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STATE OF HAWAII
KA MOKU'ĀINA O HAWAI'I
DEPARTMENT OF HUMAN SERVICES
KA 'OIHANA MĀLAMA LAWELAWÉ KANAKA
Office of the Director
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Honolulu, Hawaii 96809-0339

TRISTA SPEER
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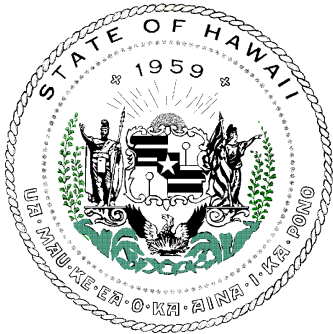
NOTICE OF INVITATION FOR BIDS (IFB)

The State of Hawaii, Department of Human Services is procuring the following service:

**FIELD OFFICE DATA QUALITY ASSESSMENT (FODQA) & PREPARATION ACTIVITIES
FOR THE COMPREHENSIVE CHILD WELFARE INFORMATION SYSTEM (CCWIS).
IFB No: SSD-CCWIS-24-07A**

The new contract(s) are anticipated to begin on October 1, 2024

As of July 23, 2024, interested parties may review the IFB posted on the State Procurement Office website at www.spo.hawaii.gov and see [Procurement Notices/Bidding Opportunities](#).



STATE OF HAWAII
Department of Human Services
Social Services Division

RELEASE DATE: July 23, 2024

INVITATIONS FOR BIDS
IFB# SSD-CCWIS-24-07A

SEALED BIDS
FOR THE
FIELD OFFICE DATA QUALITY ASSESSMENT (FODQA) &
PREPARATION ACTIVITIES FOR THE COMPREHENSIVE
CHILD WELFARE INFORMATION SYSTEM (CCWIS).

WILL BE RECEIVED UP TO 4:30 PM (HST) ON

AUGUST 21, 2024

THE DEPARTMENT OF HUMAN SERVICES SOCIAL SERVICES DIVISION 1010 RICHARDS STREET, SUITE 216 HONOLULU, HAWAII 96813.

DIRECT QUESTIONS RELATING TO THIS SOLICITATION TO [MICHAEL ARMSTRONG](mailto:MARMSTRONG@DHS.HAWAII.GOV) E-MAIL AT MARMSTRONG@DHS.HAWAII.GOV.

NOTE: *It is the Bidder's responsibility to access the State of Hawaii eProcurement system (HlePRO) and the Hawaii Awards and Notices Data System (HANDS) on the State Procurement Office (SPO) website for information on Bidding Opportunities (Notices for Solicitations) or to contact the IFB Contact Person identified in this IFB regarding any subsequently issued addenda for this IFB. The State shall not be responsible for an incomplete bid submitted as a result of the Bidder's not knowing about issued addenda, including additionally requested information or attachments, regarding this IFB.*

SSD-CCWIS-24-07A

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TRISTA SPEER
DEPUTY DIRECTOR
KA HOPE LUNA HO'ŌKELE

TO: IFB Prospective Bidders

FROM: Daisy Lynn Hartsfield
Social Services Division Administrator

SUBJECT: DEPARTMENT OF HUMAN SERVICES (DHS or Department)
SOCIAL SERVICES DIVISION (SSD)
INVITATION FOR BIDS

The State of Hawaii, Department of Human Services, Social Services Division, is currently soliciting bids from qualified Bidders to provide FIELD OFFICE DATA QUALITY ASSESSMENT (FODQA) & PREPARATION ACTIVITIES FOR THE COMPREHENSIVE CHILD WELFARE INFORMATION SYSTEM (CCWIS). The attached Invitation for Bids (IFB) # SSD-CCWIS-24-07A provides that these services are being issued pursuant to Hawaii Revised Statutes (HRS) Chapter 103D. Please see the following "Bid Submission Information Sheet" for important bid submission information.

Thank you for your interest. The DHS looks forward to receiving and reviewing your bid.

BID SUBMISSION INFORMATION SHEET

BID SUBMISSION DEADLINE:

Wednesday, August 21, 2024, 4:30 P.M., HAWAII STANDARD TIME

**PLEASE READ CAREFULLY AS THIS BID SUBMISSION INFORMATION
HAS BEEN REVISED FROM PREVIOUSLY ISSUED IFBs.**

THE BIDDER IS REQUIRED TO SUBMIT:

The Bidder shall submit a Portable Document Format (PDF) bid to the solicitation located on the State of Hawaii eProcurement system (HlePRO).

**A COMPLETE BID SUBMISSION REQUIRES THAT
ALL COMPONENTS ARE RECEIVED BY THE SPECIFIED DATE AND TIME.**

NO EXCEPTIONS SHALL BE MADE.

If the electronic copies of the bid are not received as described or not received by the specified date and time, the bid submission shall be considered incomplete or late and **SHALL NOT BE ACCEPTED** for consideration.

The Bidder shall submit bids onto the HlePRO. The Bidder shall locate this solicitation on HlePRO. The bid shall include the IFB number and the Bidder's name. All bids in PDF shall be submitted in at least eight (8) parts for ease of transmission and reviewing. All PDFs shall be identified with the IFB number SSD-CCWIS-24-07A (as abbreviated in the following example), along with the Bidder's initials (e.g., JC), and the PDF's content. If the PDF contains several sections of the bid, the PDF shall be labeled with the names of the main sections (as stated in the following example):

1. SSD FODQA 24 07A IFB (initials) v1
2. SSD FODQA C_01 Cost Workbook (initials) v1
3. SSD FODQA T_01 Cover Letter and Executive Summary (initials) v1
4. SSD FODQA T_02 Bidder Experience (initials) v1
5. SSD FODQA T_03 Bidder Project Organization and Staffing (initials) v1
6. SSD FODQA T_04 Staff Experience (initials) v1
7. SSD FODQA T_05 Bid and Contracting Forms (initials) v1
8. SSD FODQA T_06 Response Checklist (initials) v1

Bidders who submit bids or amendments by electronic means, bear the whole and exclusive responsibility for assuring that the documents are received by DHS and for assuring the complete, correctly formatted, legible, timely transmission of their documents, and assume the risk that the electronic copies may not be readable by the DHS.

All bids shall be submitted using the HlePRO portal at the following website link:

STATE OF HAWAII EPROCUREMENT SYSTEM:

<https://hiepro.ehawaii.gov/>

DHS POINT OF CONTACT (DHS POC) PERSON:

Michael Armstrong

Email: marmstrong@dhs.hawaii.gov

PLEASE BE ADVISED:

1. Bid submissions attempted after **Wednesday, August 21, 2024, 4:30 p.m., Hawaii Standard Time (HST), SHALL NOT** be accepted.
2. The Bidder is **strongly encouraged** to submit **all** electronic copies of the bid submission in advance of the bid submission deadline. This will allow the Bidder the opportunity to assure that the electronic copies have been received by the DHS in a timely manner.
3. Bids sent by facsimile (fax) shall not be accepted.
4. It is the Bidder's responsibility to access the HlePRO and the Hawaii Awards and Notices Data System (HANDS) on the State Procurement Office (SPO) website for information on Bidding Opportunities (Notices of Solicitations) or to contact the IFB Contact Person identified above regarding any subsequently issued addendum for this IFB, which may include a revision to the bid submission deadline.

PLEASE NOTE: Should a Bidder be awarded a Contract, the selected Bidder shall be required to subsequently submit in Word or Excel format, as applicable, the bid's Narrative, Performance Measurement Forms, Organization and Program Charts, Job Descriptions (no resumes), Budget forms (including the Administrative Budget forms), and Work Plan (if required), and All Mandatory FODQA IFB Required Documents (e.g. C-1, T1-T6 Documents) which shall be used to complete the final Contract.

Website Reference

The State Procurement Office (SPO) website is <http://spo.hawaii.gov/>

Non-SPO websites

Note: Website addresses may change from time to time. If a link is not active, try the State of Hawaii website at <https://portal.ehawaii.gov/>

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I. General Information

I.A. Introduction

This IFB is issued by the State of Hawaii Department of Human, Services Social Services Division (SSD), Child Welfare Services Branch (CWSB) (referred to as State or DHS) for a Firm Fixed Price Bid to provide field office data quality assessment & preparation for CCWIS activities services for the implementation of HI THRIVE, a case management information system to support Hawaii's child welfare program needs in accordance with requirements of a Comprehensive Child Welfare Information System (CCWIS) (as defined in the Glossary) compliant with 45 CFR §§1355.50 through 1355.59 and 85 FR 28410 for a CCWIS Solution. Currently, Hawaii child welfare branch has two systems in place for case management purposes including functions to generate required data reports for both federal and state government. These two systems include a legacy system known as Child Protective Services System (CPSS) which is Hawaii's child welfare's system of records and a web-based support system known as State of Hawaii Automated Keiki Assistance (SHAKA). All legacy systems shall be replaced with the implementation of Hawaii's CCWIS.

The CCWIS system shall be compliant with the U.S. Department of Health & Human Services, Administration for Children and Families (ACF) CCWIS standards. Specifically, the CCWIS system shall meet the standards established in the following federal regulations: 45 CFR §75.364 Access to Records, 45 CFR §95.615 Access to Systems and Records, 45 CFR §95.617 Software and ownership rights, 45 CFR § 75.330 Contracting with small and minority businesses, women's business enterprises, and labor surplus are firms. The CCWIS system shall also meet all federal and state data quality and data security, statutory, and regulatory requirements.

DHS intends to award a multi-term Contract, with an initial term of two (2) years, with an option to extend for an additional two (2) six (6) month terms, for a maximum length of three (3) years.

This procurement is conducted using a competitive sealed bid process pursuant to chapter 103D of the Hawaii Revised Statutes (HRS), and Title 3, Subtitle 11, Chapter 122, Subchapter 5 of the Hawaii Administrative Rules (HAR), and other applicable laws, statutes, and rules, the provisions of which are incorporated by reference and made a part of this IFB in accordance with the terms of this IFB document.

I.B. State Point of Contact and Bidder Point of Contact

The single DHS POC for all Bidder communications related to this IFB and the delivery point for all responses and correspondence is:

Attention: Michael Armstrong
Department of Human Services
Social Services Division
1010 Richards Street, Suite 216
Honolulu, HI 96813
E-mail: marmstrong@dhs.hawaii.gov

DHS may designate one or more members of DHS as a successor or successors to the individual named above.

All Bidder communications, responses and/or correspondences shall be submitted electronically.

During the IFB process, prospective and actual Bidders shall contact the DHS POC for matters regarding the IFB, except to the extent directed otherwise by the DHS POC. In that case, the prospective or actual Bidder shall contact the State governmental unit or employee designated by, and for, the purposes directed by the DHS POC. Contact with any other State personnel or attempts by a prospective or actual Bidder to contact any other State personnel, regarding this IFB, in DHS’s discretion, may result in the rejection of its Bid.

Each Bidder shall designate its own employee to serve as its point of contact (Bidder POC) to communicate on its behalf with the DHS POC throughout the procurement. The Bidder may designate new or replacement employees to serve as its Bidder POC upon reasonable notice to the DHS POC provided there shall be only one individual serving as the Bidder POC at any time unless otherwise permitted in writing by DHS.

I.C. Interpretive Conventions

Whenever the term “shall” is used in this IFB in conjunction with a specification or performance requirement, the specification or requirement is mandatory. Failure to address or meet any mandatory requirement in a Bid submitted by the Bidder may be cause for DHS’s rejection of the Bid.

Whenever the term “may” is used in this IFB in conjunction with a specification or performance requirement, the specification or performance expectation is desired, but not mandatory. Accordingly, a Bidder’s failure to address or provide any items so referred to shall not be the cause for rejection of the Bid but could result in a less favorable evaluation, because desirable requirements shall add value to the overall Bid.

Refer to the Glossary for definitions of any terms contained within this Bid.

I.D. Procurement Schedule

I.D.1 Schedule of Due Dates and Deadlines

The schedule in Table 1 represents DHS’s best estimate of the schedule that will be followed. All times indicated are in Hawaii Standard Time (HST). If a component of this schedule, such as “Bids Due (Date / Time)” is delayed, the rest of the schedule may be shifted commensurately. Any change to the IFB Schedule and Significant Dates shall be reflected and issued in an addendum. The approximate schedule is as follows:

Table 1. IFB Schedule and Significant Dates

PROCUREMENT SCHEDULE	
Release of the IFB	Tuesday, July 23, 2024
Written Questions Due	Tuesday, July 30, 2024
State’s Responses to prospective Offeror Questions Posted	Wednesday, August 7, 2024
Bids Due (Date / Time)	Wednesday, August 21, 2024, 4:30PM HST
Notice of Award (anticipated)	Thursday, August 29, 2024
Contract Start Date (anticipated)	Tuesday, October 1, 2024

I.E. Department of Human Services Overview

DHS is comprised of four Divisions with about 2,300 positions in 88 separate locations and an annual operating budget of approximately \$3.8 billion. Each of its Divisions provides different kinds of assistance.

- I.E.1** The Med-QUEST Division (MQD) provides Medicaid, Child Health Insurance Program (CHIP) health coverage, and State funded medical assistance programs, primarily through managed care plans, to low-income families, children, and individuals.
- I.E.2** The Social Services Division (SSD) provides Child Welfare Services that include child protective services, permanency placement, and case management. SSD is also responsible for Adult Protective and Community Services, however, the sole focus of this procurement is on implementing a modernized automated case management system for Hawaii's Child Welfare program to enhance case workers' ability to quickly assess safety and risk issues of vulnerable children in need of protection and make informed intervention decisions based on real time data available on-line and through electronic interfaces with other agencies who provide services to the same family.
- I.E.3** The Division of Vocational Rehabilitation (DVR) provides rehabilitation needs for persons with disabilities to secure employment, and to lead full, and productive lives.
- I.E.4** The Benefit, Employment, and Support Services Division (BESSD) provides Supplemental Nutrition Assistance Program (SNAP, formerly known as "Food Stamps"), financial assistance, employment support, dependency diversion and prevention services, and childcare licensing.

The DHS Office of the Director has primary responsibility for overall leadership, oversight, and operations of DHS. The Director is appointed by the Governor, confirmed by the Senate, and assisted by the Deputy Directors. The Director's office staff responds to public and media inquiries and maintains the DHS website (<http://humanservices.hawaii.gov/>).

Six staff offices support DHS administration, operating divisions, and attached agencies:

I.E.5 The Administrative Appeals Office (AAO)

The Administrative Appeals Office (AAO) currently provides administrative due process hearings in contested cases for the Department. The AAO also serves as the rule's coordinator for the Department, and reviews administrative proceedings for the adoption, modification, or repeal of Department rules. AAO hearings for child welfare services address parents who disagree with CWS' adverse actions against them such as confirmation as perpetrators of child abuse/neglect.

I.E.6 The Budget, Planning, and Management Office (BPMO), and the Audit, Quality Control and Research Office (AQCRO).

Two offices provide research, quality assurance (QA), program, and financial evaluation and assessment capabilities that enable DHS to oversee its programs and make appropriate decisions concerning those programs – The Budget, Planning, and Management Office (BPMO), and the Audit, Quality Control and Research Office (AQCRO). The BPMO supports the Budget Staff, Planning Staff, and the Program and Management Evaluation Staff. The AQCRO supports the Financial Evaluation Staff, Quality Control Staff, and the Research Staff.

I.E.7 The Fiscal Management Office (FMO)

The Fiscal Management Office (FMO) provides staff assistance and advisory services for the administrative functions of fiscal management. FMO formulates policies and procedures, and administers the Department's central accounting functions, funds management, client and vendor payment, employee payroll, inventory management, contracting, purchasing, records management, office space allocation, and central mail distribution functions. FMO also provides consultative and technical advisory services in these functional areas.

I.E.8 The Office of Information Technology (OIT)

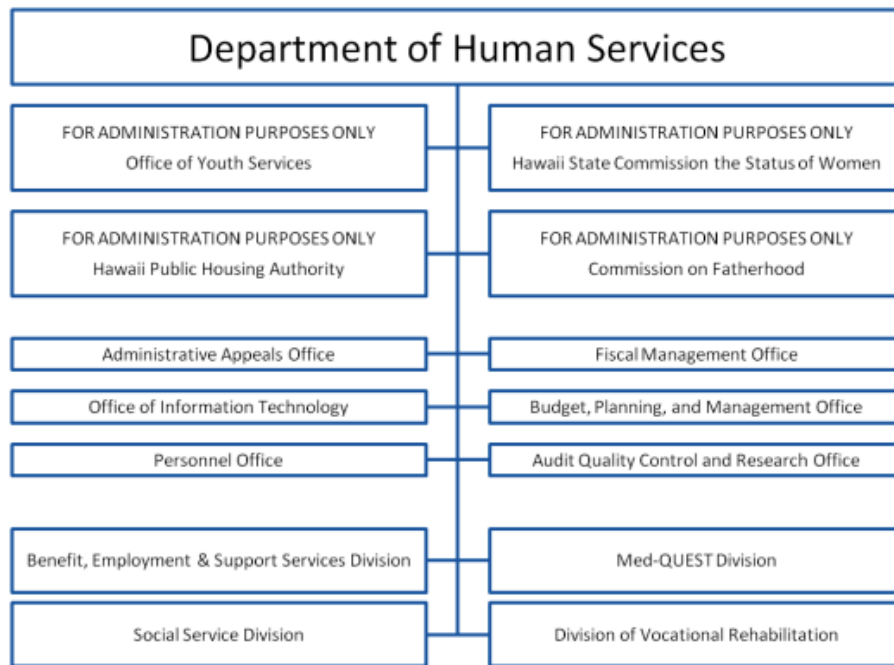
The Office of Information Technology (OIT) is responsible for the overall administration, planning, direction, management, development, implementation, and maintenance of all Information Technology (IT), and Information Systems processing for the Department statewide. OIT provides project planning and management, business Software application systems development, maintenance, systems software and hardware management, telecommunications, network management and support, and technical training. OIT operates the Data Center including computing facilities management, data control, and technical help desk functions located in the Queen Liliuokalani Building basement. OIT also oversees the administration of the dedicated DHS Mainframe System Complex, and all hardware peripherals located at the Department of Accounting and General Services (DAGS), Information and Communication Services Division (ICSD). This is separate from the State's mainframe system. Additionally, this office directs and coordinates all IT matters within, and between, DHS and other State and county agencies, federal agencies, and commercial hardware and software vendors, including private consultants.

I.E.9 The DHS Human Resources Office

The DHS Human Resources Office oversees the personnel programs of the Department, including recruitment, examination and placement, position description, classification and pricing analysis, labor relations, civil rights, employee safety and relations, employee training and development, personnel transactions, and maintenance of personnel records.

DHS is comprised of the Directors Office, four divisions, 6 staff offices, 2 attached agencies, and 2 commissions.

Figure 1. DHS Organizational Structure



I.F. DHS Social Services Division Overview

SSD is comprised of the Child Welfare Services Branch (CWSB), and Adult Protective and Community Services Branch (APCSB). SSD provides protection from abuse and neglect for children, and vulnerable adults. The CCWIS project is targeted solely for Hawaii’s Child welfare programs. Child welfare programs focus on safety, permanency and well-being of vulnerable children. SSD operates out of 15 office locations with a total of about 500 employees and serves four (4) counties across the islands: Honolulu County (Island of Oahu), Maui County (Islands of Maui, Molokai, and Lanai), Kauai County (Islands of Kauai, and Niihau), and Hawaii County (Hawaii Island, also known as the Big Island). SSD also includes the Support Services Office (SSO), with several units that provide various administrative, training, and technical support to the Division. The SSO is comprised of the Systems Operations Unit, Staff Development Office, and the Purchase of Services and Grant Management Unit.

CWSB provides services to an ethnically and culturally diverse population of children and families. CWSB staff reflect the cultures, languages, and ethnic backgrounds of the people they serve. The CCWIS Solution shall be developed and/or configured in a manner that considers the diverse needs, linguistics, and cultures of the state’s populations.

Our agency is committed to partnering with vendors who are culturally responsive, attuned to and practiced in delivering services with an eye towards diversity, equity, and inclusion. Culturally responsive services mean work tailored to or sensitivity and expressed understanding of Hawaii’s cultural background, beliefs, knowledge, or frames of reference for engagement.

An organization that demonstrates cultural responsiveness is one that is designed to effectively meet the needs of individuals from diverse cultural backgrounds and experiences. It involves understanding not only the societal oppressions faced by various groups of people, but also

respecting the strengths and assets inherent in different communities. This understanding is then reflected in program services, personnel, staffing, philosophies, and policies.

I.F.1 Child Welfare Services Branch Information

The CWSB is a State-administered and operated Child Welfare Agency that provides Child Welfare Services (CWS), and is mandated by law to ensure the safety, permanency, and well-being of children (Federal Child Abuse Prevention and Treatment Act (CAPTA) as Amended by Public Law 111-320, the CAPTA Reauthorization Act of 2010, and HRS Chapter 587A, The Child Protective Act). CWSB operates 8 geographic sections Statewide with a total number of 500 employees or users. Four sections are on Oahu (East, West, Statewide, and Special Services); East Hawaii Section located in Hilo, Hawaii; West Hawaii Section located in Kona; Kauai Section in Kauai Island, and Maui Section located in Maui and covering the islands of Molokai and Lanai. CWS' Intake or Hotline unit opens 24-7 daily. The primary functions of CWS include intake, assessment/ investigation to ensure safety, well-being, and permanency of children, and provides supportive services to children, and their families. Statewide services include child protection services, family first prevention of foster care placement, differential response services (DRS) such as family strengthening services (FSS) and voluntary case management (VCM), foster care, adoption, legal guardianship (LG), independent living/ transitional services for young people in foster care including extended foster care of young adults up to 21 years of age known as Imua Kakou (IK), licensing of general and relative resource caregivers homes, also known as foster homes, Child Care Institutions (CCIs), and Child Placement Organizations (CPOs). Currently, CWSB is functioning at 70% of workforce capacity.

I.F.1.a Child Welfare Services Caseload

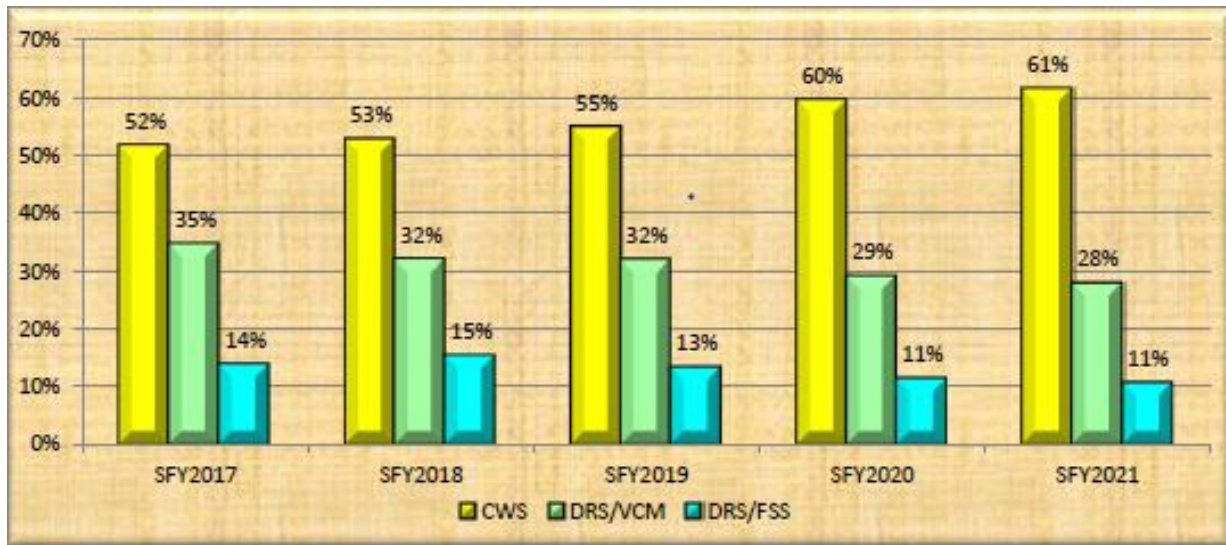
CWSB caseloads encompass a wide range of clients and services including intake, investigation/assessment, case management/permanency, foster care, and permanency services including goals of adoption, legal guardianship, and another planned permanent living arrangement (APPLA) as required by the Adoption and Safe Family Act of 1997 (ASFA 1997). The CWSB also offers continuing financial support to sustain adoptions with adoption assistance (AA), guardianship with permanency assistance (PA) and higher education payments and Educational Training Vouchers (ETV) endeavors for eligible youth formerly in foster care.

As of March 2022, the average statewide caseload for CWSB was approximately 26 cases per social worker. Caseloads have been consistent for the past three years.

During state fiscal year (SFY) 2021, CWSB Intake assigned a total of 5,001 cases for follow-up. Of that total, 3,073 (61%) cases were assigned to CWSB for investigation, another 1,397 (28%) were assigned to VCM, and 531 (11%) were referred to FSS.

The percentage of assessments assigned to CWSB, VCM, and FSS from SFY 2017 through SFY 2021 are shown in Figure 2 below.

Figure 2. % Of Assessments Assigned to CWSB, VCM and FSS (FY 2017 – FY 2021)



I.F.1.b Foster Care

A total of 2,520 children entered the Hawaii foster care system in FY 2021.

CWSB has partnered with EPIC ‘Ohana, Inc. (EPIC) to engage fathers, and families, to fully participate in their CWSB case, and more broadly, to fully participate in their children’s lives. The collaborative emphasis on family connections promotes the location, recruitment, and development of family connections, and placement resources with extended family. These efforts also help ensure a child’s permanency by increasing the identification of connections, and placement/support resources within their own family.

I.F.1.c Resource Caregivers

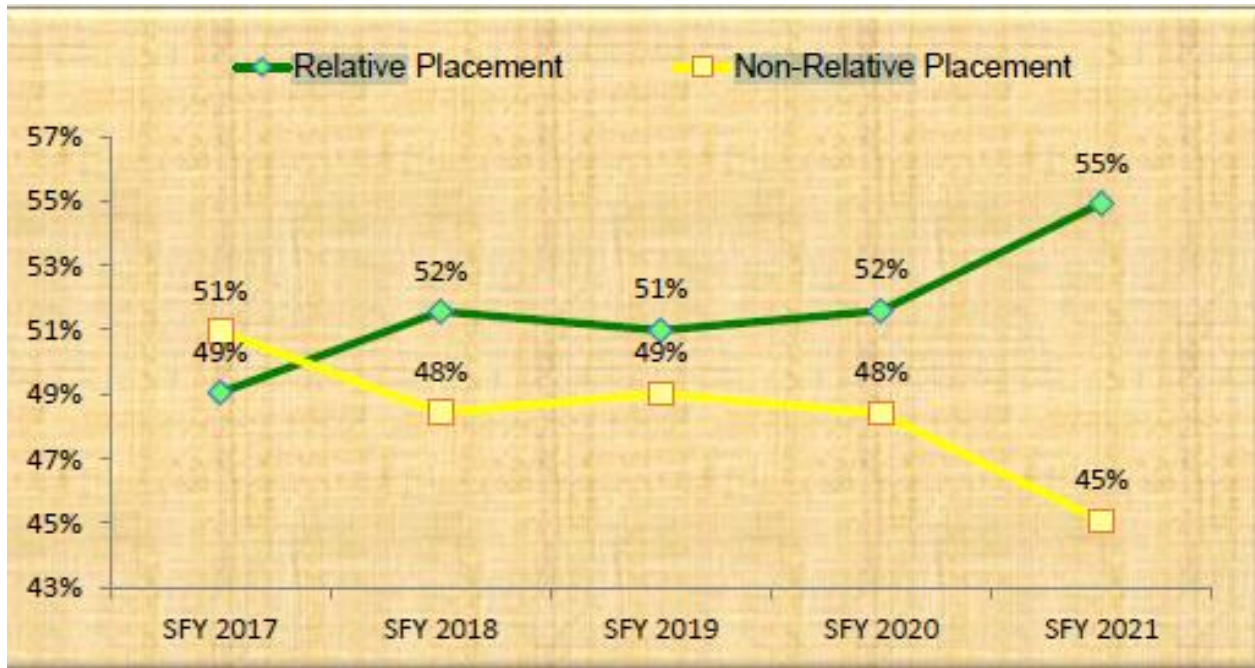
DHS is committed to supporting a child’s family connections. National data indicate that when children and youth cannot remain safely in their family homes, placement with relatives provides the next best outcome. Through continuing CWSB emphasis on finding family connections and establishing partnerships with community stakeholders like ‘Ohana Conferencing, and EPIC, children in foster care have: 1) increased connections with their birth and extended families, and 2) increased placement with relatives.

DHS continues to contract for services with Catholic Charities of Hawaii, and Family Programs Hawaii to integrate recruitment, training, home studies, and support services for foster children, and resource families. The focus on statewide recruitment of Native Hawaiian resource families has successfully increased the availability of Native Hawaiian resource families to approximately 44% of the total resource family pool.

The continued emphasis on family, and family connections, has positively increased the percentage of children placed with relative resource caregivers. In 2020, approximately 52% of children in foster care are placed with relatives; 48% with non-relatives. In SFY 2021, approximately 55% of the children in foster care were placed with relatives. Hawaii leads the nation in the percentage of foster children placed with relatives.

Details regarding relative versus non-relative placement from FY 2017 through FY 2021 are shown in Figure 3 below.

Figure 3. CWSB Relative versus Non-Relative Placement (FY 2014 – FY 2018)¹



I.F.1.d Sex and Labor Trafficking

DHS introduced, and championed, legislation that protects child victims of sex and labor trafficking within the scope of the Child Protective Act section 350-1, HRS. The legislation heightened awareness and support for child victims of sexual exploitation or labor trafficking, and promote prevention, early identification, intervention, and services to address the needs of trafficked children. Currently, contracted agencies provide comprehensive human trafficking services to children identified as victims. CWSB continues collaboration with local and federal law enforcement and other community partners to provide a coordinated response to child victims of sex or labor trafficking.

I.F.1.e Family First Prevention Services Act (FFPSA)

The *Family First Hawaii (FFH): Keeping Families Together* five-year prevention plan was approved by the U.S. Department of Health and Human Services (HHS) for implementation beginning October, 2021. The plan allows CWSB to support the prevention of child abuse/neglect and prevent children from entering foster care through delivery of four evidence-based programs: Intensive home-based services using the HOMEBUILDERS® model; Home Visiting programs using two models: Parents as Teachers (PAT) and Healthy Families America—Child Welfare Adaptation (HFA); and Motivational Interviewing (MI). Hawaii implemented statewide the HOMEBUILDERS® model, PAT, and HFA in 2021-2022, with plans to implement MI in 2023-2024. DHS is authorized to claim Title IV-E prevention funds from the federal government to support these services. However, DHS shall be able to capture required data and outcomes reports accurately and timely in order to comply with federal claims requirements. FFH programs are supported by Federal Title IV-E Prevention Funds and State General Funds.

¹ State of Hawaii Department of Human Services MSO.

I.F.1.f Voluntary Care to Age 21 – Imua Kakou

DHS provides services of extension of foster care to age 21 also known as Imua Kakou (IK). Young adults are eligible to receive a safety net of supportive services and financial benefits during their critical transition to adulthood, including extension of foster care payments made to their caregivers, continued oversight by a case worker for additional support, counseling services, continued health care coverage, housing options, training in independent living skills, employment or job skills, and additional time to finish high school, and pursue vocational or secondary education. The program is supported by Federal Title IV-E, and State general funds.

II. General Instructions and Bid Requirements

II.A. Pre-Bid Instructions

II.A.1 Written Questions and Responses

If a prospective Bidder believes that any provision of the IFB is unclear, is potentially defective or would prevent it from providing a complete and thorough Bid, it shall submit questions via HlePro, before the date set forth in the schedule contained in Section I.D.1 of this IFB.

Each question shall identify the page, section number, paragraph, and line or sentence of such provision(s) of the IFB to which the question applies, the specific language in question, as well as the question itself. DHS shall use its best efforts to respond by the date stated in the schedule.

Responses to questions shall be posted to HlePRO by the answer deadline.

II.A.2 Bidders Shall Review State Documents

As part of reviewing state statutes, rules, policies and administrative directives, Bidders shall review and have an understanding of the following:

- Hawaii Awards and Notices Data System (HANDS) for Bidding Opportunities (Notices of Solicitations) <https://hands.ehawaii.gov/hands/opportunities>
- Hawaii Revised Statutes (HRS) <http://spo.hawaii.gov/references/hrs/>
- Hawaii Administrative Rules (HAR) <https://spo.hawaii.gov/references/har/goods/>
- Hawaii Revised Statutes §27-43 (ETS and CIO mandate and responsibilities)
ADMINISTRATIVE DIRECTIVE NO. 18-03 - Program Governance and Field Office Data Quality Assessment & Preparation for CCWIS Activities Requirements for Enterprise IT Projects
- ETS IT Governance found on the ETS website (<https://ets.hawaii.gov/>)
- ETS Policies, Standards and Guidelines found on the ETS website (<https://ets.hawaii.gov/>)

This IFB is issued under the provisions of chapter 103D, HRS, and the corresponding administrative rules. The Bidder is charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed bid by the Bidder shall constitute admission of such knowledge on the part of Bidder.

II.B. Bid Instructions

II.B.1 Bid Preparation Costs

All costs incurred by the Bidder in preparing, submitting a Bid and participating in this procurement, shall be the Bidder's sole responsibility whether any award results from this IFB. DHS shall not reimburse such costs.

II.B.2 Multiple Responses

Each Bidder may only submit one (1) Bid. If the Bidder submits more than one (1) Bid, DHS shall reject all Bids submitted by the Bidder.

II.B.3 Required Review

Before submitting a Bid, the Bidder shall thoroughly and carefully examine this IFB, any attachment, addenda, and other relevant documents, to confirm the Bidder understands the requirements of the IFB. The Bidder shall also become familiar with state, local, and federal laws, statutes, ordinances, rules, standards, and regulations that may in any manner affect cost, progress, or performance of the work required.

II.B.4 Subcontractors

If selected, the FODQA Vendor is fully responsible for all work performed under the Contract. If a Bid is submitted jointly by more than one organization, one organization shall be designated as the Bidder who then is designated as the primary FODQA Vendor. All other organizations shall be designated as subcontractors.

All subcontracted work, and subcontractors performing that work, shall be identified in the Bid. Bidder shall only enter into written subcontract(s) for performance of these functions under the Contract upon the agreement and Acceptance of the subcontract by DHS, and after all parties sign the Contract. Subcontracts shall be approved in writing by DHS prior to the effective date of any subcontract. No subcontract that the selected Bidder (or Contractor) enters into with respect to performance of this Contract shall in any way relieve the Contractor of any responsibility for performance of duties.

The Contractor shall give DHS immediate notice by certified mail of any action or suit filed, including but not limited to arbitration or mediation, and prompt notice of any claim made against the Contractor, by any subcontractor or vendor that in the opinion of the Contractor may result in litigation related in any way to the Contract with DHS.

II.B.5 Bid Submission Instructions and Details

II.B.5.a Forms/Formats

Forms, with the exception of Mandatory FODQA IFB specific forms, may be found on the SPO website (SEE THE BID SUBMISSION INFORMATION SHEET AT THE BEGINNING OF THIS IFB). For the FODQA IFB specific forms see Table 2. Bid Sections and Mandatory Response Template Overview of this IFB. The Applicant shall address all the requirements in this IFB as specified.

II.B.5.a.1 Hawaii Compliance Express (HCE)

All Contractors shall comply with all laws governing entities doing business in the State. Contractors are encouraged to register with HCE for on-line compliance verification from the Hawaii State Department of Taxation (DOTAX), Internal Revenue Service (IRS), Department of Labor and Industrial Relations (DLIR), and Department of Commerce and Consumer Affairs (DCCA). There is an annual registration fee for the service (currently \$12.00). The HCE's on-

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line "Certificate of Vendor Compliance" provides the registered Contractor's current compliance status as of the Certificate's issuance date and may be accepted for both contracting and final payment purposes.

HCE Forms may be found on the SPO website (SEE THE BID SUBMISSION INFORMATION SHEET AT THE BEGINNING OF THIS IFB.)

II.B.5.a.2 Tax Clearance

Pursuant to HRS §103-53, as a prerequisite to entering into a contract of \$25,000.00 or more the Bidder shall be required to have a tax clearance from DOTAX and the IRS.

II.B.5.a.3 Labor law compliance

Pursuant to HRS §103-55, the Contractor shall be in compliance with all applicable laws of the State and federal governments relating to Payment of Wages, Safety, Workers' Compensation, and Unemployment Compensation.

II.B.5.a.4 DCCA business registration

Prior to entering into a contract, the owner of any Bidder doing business in the State, except the owner of a sole proprietorship, charitable organization, unincorporated association, or foreign insurance company, shall be registered and in good standing with the DCCA, Business Registration Division. Also, a foreign insurance company shall register with the DCCA, Insurance Division.

II.B.5.a.5 Wages Law Compliance

By submitting a bid, the Bidder certifies that it is in compliance with HRS §103-55 Wages, Hours, and Working Conditions of Employees of Contractors Performing Services.

II.B.5.a.6 Campaign contributions by State and county providers/contractors

HRS §11-355 prohibits campaign contributions from certain State and county government providers/contractors during the contract term if the providers/contractors are paid with funds appropriated by a legislative body.

II.B.5.a.7 Confidential information

If the Bidder believes any portion of a bid contains information that may be withheld as confidential, the Bidder shall request in writing for non-disclosure of designated proprietary data to be confidential and provide justification to support confidentiality. Such data shall accompany the bid, be clearly marked, and be readily separable from the bid to facilitate eventual public inspection of the non-confidential sections of the bid.

Note: Expenditure/Item costs are not considered confidential and shall not be withheld.

II.B.5.b Bid Submission

FOR BID SUBMISSION INFORMATION REGARDING THIS IFB PLEASE REFER TO THE "BID SUBMISSION INFORMATION SHEET" AT THE BEGINNING OF THIS IFB.

II.C. Instructions for IFB Response Content

II.C.1 Bid Objectives

The IFB document, and the Mandatory Response Templates, provide a structured approach for DHS to detail its business and technical needs for this Project, and a structured way for the Bidder to respond to those needs. It is critical that Bidders respond in a manner consistent with this structure to ensure that DHS shall evaluate all responses in an objective manner. No additional materials than those requested in the Response Template may be submitted. In event additional materials are submitted, they will not be reviewed as part of the acceptability evaluation.

The acceptability evaluation is not conducted for the purpose of determining whether one bidder's item is superior to another but only to determine that a bidder's offer is acceptable as set forth in the IFB. Any bidder's offering which does not meet the acceptability requirements shall be rejected as “nonresponsible”.

All Bids shall be evaluated in an objective, and structured manner. The award shall be issued to the lowest responsive, responsible bidder whose bid meets the requirements and criteria set forth in the invitation for bids and posted pursuant to section 103D-701, HRS.

II.C.2 Bid Format and Contents – Mandatory Response Templates

The Bid shall be in the order and format of the Mandatory Response Templates, and all Mandatory Response Templates shall be completed. Bids that do not closely follow the format and structure of the Mandatory Response Templates may have a significant negative impact on the acceptability evaluation process. It is the Bidder's responsibility to confirm its Bid is submitted in a manner that enables DHS to easily locate all response descriptions and exhibits for each requirement of this Bid.

All sections/templates listed in Table 2 shall be completed and included for a Bid to be considered responsible:

Table 2. Bid Sections and Mandatory Response Template Overviews

Section / Template	Name	Description
T-1	Cover Letter and Executive Summary	<ul style="list-style-type: none"> ■ This section of the Bid shall include a cover letter and executive summary stating the Bidder's intention and willingness to enter into a Contract with DHS on the basis of the submitted Bid. ■ The Bidder's response shall include a transmittal (cover) letter, table of contents, executive summary, contact information and locations. ■ Offer Form OF-1 in the Response Template T-1 is required to be completed using Bidder's exact legal name as registered with the Department of Commerce and Consumer Affairs, if applicable, in the appropriate space. Failure to do so may delay proper execution of the Contract. ■ The Bidder's authorized signature on the Response Template T-1 marked "ORIGINAL" shall be a wet original signature in black or blue ink, which shall be required before an award, if any, may be made.
T-2	Bidder Experience	<ul style="list-style-type: none"> ■ This section of the Bid shall include details of the Bidder's Experience. ■ The Bid shall include Bidder organization profile, the Bidder's experience in U.S. State and National level, financial references, and other required forms. If the Bid includes the use of subcontractor(s), projects completed in the last five (5) years shall be provided. ■ Prime Bidder's experience must demonstrate fulfillment of the Minimum Mandatory Qualifications
T-3	Bidder Project Organization and Staffing	<ul style="list-style-type: none"> ■ This section of the Bid shall include the Bidder's proposed Organization and Project Staffing approach. ■ The Bid shall include the proposed approach to: organization plan; organization chart; key staff; subcontractor(s); Bidder's approach to working with the Project staff.
T-4	Staff Experience	<ul style="list-style-type: none"> ■ This section of the Bid shall include a narrative of the Bidder's Staff Experience. ■ The Bid shall include the summary of skill sets; total years of experience in the proposed role; qualifications. ■ If a subcontractor is included, the Bid shall include a summary of the proposed staff's (Prime Bidder and subcontractor) experience in working together on projects.

Section / Template	Name	Description
T-5	State of Hawaii Bid and Contracting Forms	<ul style="list-style-type: none"> ■ This section of the Bid includes Bid and Contracting forms broken down into three (3) sections; instructions are stated at the beginning of each section. ■ Section 1 includes Forms to be Returned with the Bid where the Bidder shall identify and provide an explanation for any information in its Bid that it considers to be confidential and proprietary. Section 2 includes Forms Required to Execute Contract. Section 3 includes Attachment as Part of the Contract, provided for reference only, that shall be attached to the Contract if the selected Bidder is awarded the Contract.
T-6	IFB Response Checklist	<ul style="list-style-type: none"> ■ This section of the Bid shall include the completed checklist verifying that all the IFB response requirements have been completed.

II.C.2.a Cost Bid

This portion of the Bid shall include Template C-1 as described below. This shall abide by the instructions contained within the Response Template.

Section / Template	Name	Description
C-1	Cost Workbook	<ul style="list-style-type: none"> ■ Details the costs associated with the Bid.

The Cost Bid shall include a response through the mandatory use and submission of Mandatory Response Template C-1 Cost Workbook. Bidders shall complete the Template as instructed. No cost information may be contained in the Bid submission, unless explicitly requested. Only cost information provided in the Cost Bid shall be considered.

The Bid cost shall be firm fixed price with payments based on deliverables as required and approved by DHS.

It is the sole responsibility of the Bidder to ensure that all mathematical calculations are correct, and that the total costs reflect the total Bid cost (State reserves the right to correct obvious mathematical errors).

Completion of all portions of the Cost Workbook is mandatory. Applicable purchase, delivery, tax, services, safety, license, travel, per diem, Bidder's staff training, facility, and any other expenses associated with the delivery, and implementation of the proposed items shall be included in the proposed costs.

There shall not be any conditions attached to the proposed costs such as a price guarantee period.

All proposed software, including but not limited to proprietary software and tools, custom software, and COTS software, shall be included in the Cost Workbook as part of the total deliverable cost.

II.D. Additional Instructions

II.D.1 Bid Forms

The Bidders shall respond to, and include all items specified in this IFB, and any subsequent addendum.

Pricing shall be submitted in Response Template C-1. The price shall be the all-inclusive cost, including but not limited to the General Excise Tax (GET) to State. No other costs shall be honored. Any unit prices shall be inclusive.

II.D.2 Issuance of IFB and State's Right to Modify, Cancel, Suspend, and/or terminate the IFB and any Contracts

Without limiting any other provision of the IFB (including but not limited to any exhibits, attachments, appendices, Response Templates, and the IFB as amended by any addenda), DHS has the right for its convenience, and without cause, to modify, cancel, suspend, or terminate the IFB, including, without limitation, the right to cancel and withdraw the IFB prior to acceptance of Bids or prior to the award of a Contract for some or all of the requested FODQA services, or in connection with any termination or change in funding. Any modifications to the IFB shall be written in an addendum, posted as an attachment to the original posting on SPO website.

II.D.3 Modifications Prior to Submittal Deadline or Withdrawal of Bids

The Bidder may modify or withdraw the bid at any time prior to the due date. The Bidder may modify the bid after the due date, only if allowed by DHS.

II.D.4 Opening of Bids

All received bids shall be secured by the State and not examined for evaluation purposes until after the bid submittal deadline. Procurement files shall be open to public inspection after a contract has been awarded and fully executed.

II.D.5 Rejection of Bids

The State reserves the right to consider only those bids submitted that are in accordance with all requirements set forth in this IFB, comply with the service specifications, and demonstrate an understanding of the problems involved as responsible. A bid offering any other set of terms and/or conditions may be rejected without further notice.

II.D.6 Proprietary/Confidential Information

All Bids shall become part of the Contract files, and available for public inspection, except for those sections that a Bidder has designated as confidential and has requested in writing that the section not be disclosed. Any requests for nondisclosure sections shall accompany the Bid with justification to support the confidentiality claim (see State of Hawaii Bid and Contracting Forms, Section 1.1 Confidential and Proprietary Information Form).

Bidders shall identify confidential sections in the designated areas of the Response Templates. Such sections shall accompany the Bid and shall be readily separable from the Bid in order to facilitate eventual public inspection of the non-confidential portion of the Bid. The confidential information shall be marked "Proprietary" or "Confidential" and shall be easily identified by indicating its section and/or page number(s) in the Bid's table of contents.

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If it is determined that the material designated as confidential is subject to disclosure, the material shall be open to public inspection unless the Bidder appeals pursuant to HRS §92F-42(1).

III. Background and Scope of Work

III.A. Project Overview and History

DHS is acquiring a CCWIS Solution to support SSD's CWSB and replace DHS's current systems. The envisioned CCWIS Solution is highly configurable in function and format.

III.B. Project Governance

DHS has established effective governance to ensure the CCWIS Project shall improve access, outcomes, quality, and cost for child welfare services.

The following represents the Project structure and governance. It provides a high-level definition of the role of each group and illustrates the flow of project decision-making and escalation of project issues.

III.B.1 Hawaii'i CCWIS Executive Team

The Hawaii'i CCWIS Executive Team is comprised of Daisy Lynn Hartsfield, Social Services Division Administer, and Mark Choi and Enterprise Officer. Their role on the project is to provide direction and guidance and to safeguard that the project aligns with the agency's strategic direction and goals. They also ensure that required resources (financial and personnel) are made available to project completion. The executive team has final say to manage and direct the day-to-day operations for the CCWIS.

III.B.2 Hawaii'i CCWIS Program Steering Committee

The Hawaii'i CCWIS Program Steering Committee is comprised of Hawaii'i DHS Child Welfare Administrators. The program steering committee provides subject matter expertise on all child welfare program-related questions. Their role on the project is to ensure that program priorities and needs are addressed by the project deliverables and outputs. Per the escalation procedures detailed below, this team is responsible for vetting any escalated issues or decisions and providing a recommendation to the CCWIS Executive Team. Members of this team are maintained in the Stakeholder Register.

III.B.3 Hawaii'i CCWIS Core Team

The Hawaii'i CCWIS Core Team is comprised of Hawaii'i DHS staff and contracted staff. Their role on the project is to manage and direct the day-to-day operations for the CCWIS. Per the escalation procedures detailed below, this team is responsible for ensuring that all identified project risks and issues are initially vetted and mitigated/resolved or escalated for resolution. Members of this team are maintained in the Stakeholder Register.

III.B.4 Project Management Office (PMO)

The Project Management Office (PMO) is comprised of the PMO vendor for the Hawaii'i CCWIS project. Their role on the project is to streamline project decision making for the Hawaii'i CCWIS Core Team by providing tools, best practices, child welfare expertise and guidance in effective large-scale, culturally competent child welfare system implementations. This team advises and recommends to the Hawaii'i CCWIS Core Team. Members of this team are maintained in the Stakeholder Register.

III.B.5 Hawai'i CCWIS Program Team

The Hawai'i CCWIS Program Team is comprised of Hawai'i DHS program staff. Their role on the project is to set the direction of what needs to occur (program goals, reporting mandates, data collection and outcomes), and to provide the business metrics for measuring success. This team is responsible for ensuring that the selected configured system meets the desired policy and procedural requirements that the state has defined a best practice for child welfare services. This team has representation on the Hawai'i CCWIS Core Team. Members of this team are maintained in the Stakeholder Register.

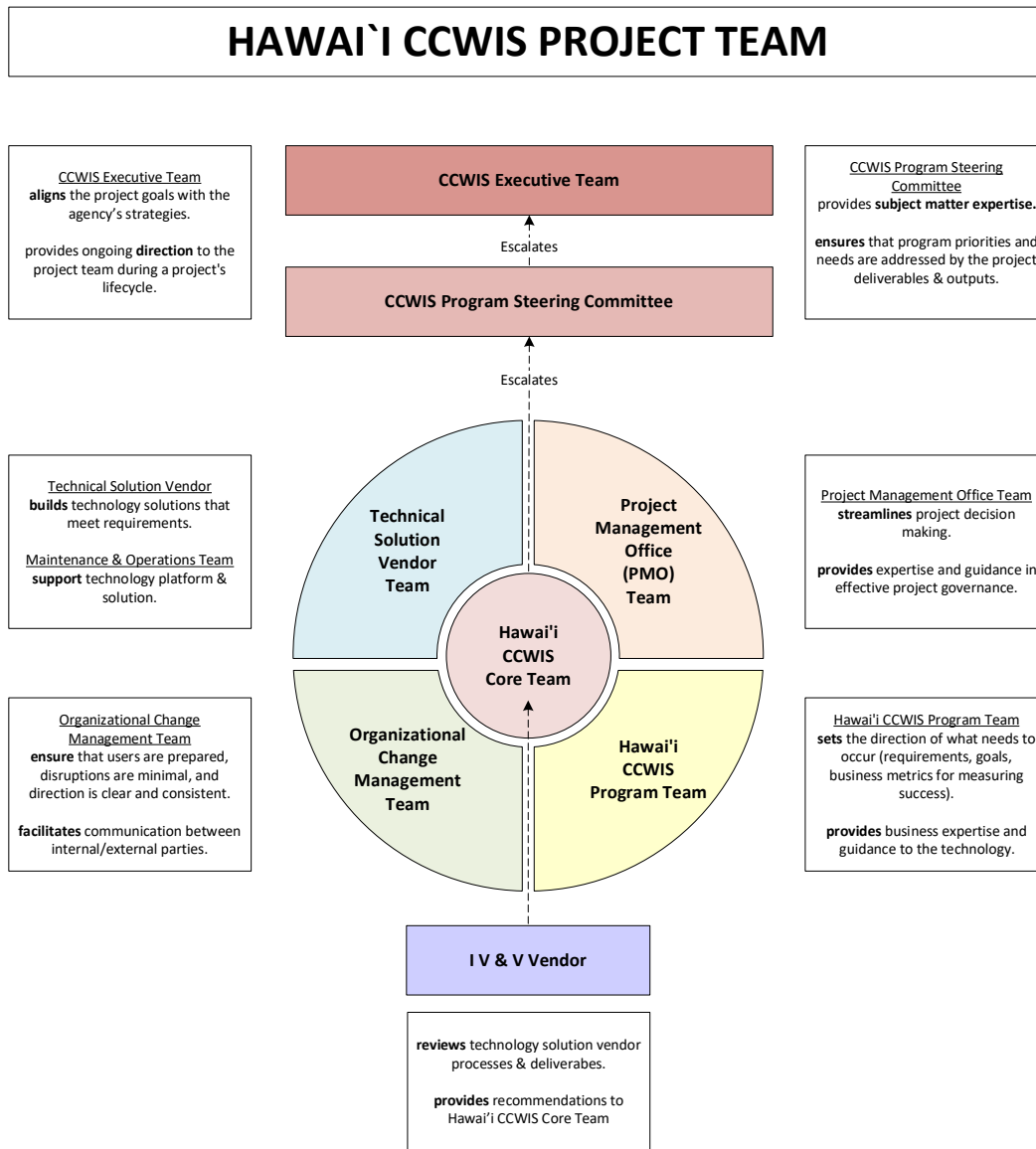
III.B.6 Technical Solution Vendor

The Technical Solution Vendor is comprised of the selected vendor who will provide, configure and implement the CCWIS system. This team will build the technology solution(s) that meet the requirements for Hawai'i CCWIS. As part of this work, this team will extract, transform and load existing identified Hawai'i child welfare data that is required for the newly installed system to be operational and compliant when deployed. This team reports to the Hawai'i CCWIS Core Team.

III.B.7 Organizational Change Management Team

The Organizational Change Management Team is comprised of the selected vendor who will provide, under the direction and guidance of the Hawai'i CCWIS Program Team and Hawai'i CCWIS Core Team a comprehensive Change Management Plan that ensures users (defined as internal Hawai'i DHS staff and contracted staff, third party child welfare service providers, foster care resource families and facilities, and any consumer or potential consumer of Hawai'i child welfare services; i.e., clients or members of the public) are prepared, that disruptions are minimal, and that direction is clear and consistent. This team will also facilitate communication between internal/external parties. This team reports to the Hawai'i CCWIS Core Team.

Figure 4. CCWIS Project Governance Structure



III.C. FODQA Scope of Work

The FODQA Vendor will plan and conduct onsite sessions with each field office for the purpose of assessing the condition of hardcopy case records for active clients. These onsite activities will coincide with a parallel effort by the FODQA Vendor in assessing the data quality and condition of electronic case records for each field office in legacy systems for active clients.

The FODQA Vendor will provide the Hawai'i CCWIS Core Team and to each office, an assessment of their current state of data quality and areas requiring attention prior to CCWIS implementation.

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The FODQA Vendor will then provide ongoing onsite technical assistance to each field office; this assistance will be tailored to the identified data quality needs and incorporating best practices for child welfare documentation.

The FODQA Vendor will monitor progress for each field office and provide each field office and the Hawai'i CCWIS Core Team with status on a monthly basis.

Finally, the FODQA Vendor will provide recommendations to the Hawai'i CCWIS Core Team and CCWIS Technical Vendor as to the CCWIS data migration strategy to be employed for that field office.

The FODQA Vendor will be responsible for:

Table 3. List of FODQA Tasks and Deliverables

*Note: Each deliverable indicated in this table has a dedicated deliverable description section below. Some deliverables listed are made up of multiple documents which are listed within their respective section.

Task	#	Deliverable	Frequency
Task 1 – Develop and Maintain the FODQA Plan	FODQA.1	FODQA Plan	Once
	FODQA.2	FODQA Plan Updates	Updated as needed. At a minimum, updated once the CCWIS Technical Vendor Release Plan is approved.
Task 2 – Perform Field Office Hardcopy Case Record Assessments	FODQA.3	Hardcopy Case File Format, Taxonomy and Minimum Requirements	Once Approved by CCWIS Program Steering Committee prior to commencement of onsite activities.
	FODQA.4	Field Office Onsite Hardcopy File Review	Two onsite visits per field office Location (38 locations, A total of 76 trips), with a two-day duration of each onsite visit
	FODQA.5	Field Office Hardcopy Case Record Baseline Assessment	Once per field office
Task 3 – Perform Field Office Electronic Case Record Assessments	FODQA.6	Electronic Case File Minimum Requirements	Once Approved by CCWIS Program Steering Committee prior to commencement of data analysis activities.
	FODQA.7	Field Office Electronic Case Record Baseline Assessment	Once per field office location
Task 4 – Perform Ongoing Technical Assistance/ Report on Status	FODQA.8	Field Office Hardcopy Case Record Ongoing Assessments	Monthly, following Field Office Electronic Case Record Baseline Assessment. Each monthly assessment includes all field office locations.
	FODQA.9	Field Office Electronic Case Record Ongoing Assessments	Monthly, following Field Office Electronic Case Record Baseline

Task	#	Deliverable	Frequency
			Assessment. Each monthly assessment includes all field office locations.
Task 5 – Provide recommendation for CCWIS data migration based on Field Office data collection	FODQA.10	CCWIS Field Office Implementation Strategy	Once per field office location

Payments for the applicable deliverables in the table above shall occur based on the Deliverable Acceptance process outlined in section III.D.3 and shall be scheduled as defined in the Project Work Plan & Schedule deliverable. A payment event shall include all deliverables eligible for payment based on the Deliverable Acceptance process and Project Schedule.

Table 4. List of FODQA Deliverables

Deliverable FODQA.1 – FODQA Plan	
Required Delivery	Submitted for approval no more than 30 business days following Contract Start Date
Description	<p>The purpose of this deliverable is to provide a detailed FODQA Plan that addresses the key domains required to execute the full FODQA life cycle. The Plan also includes metrics for tracking project performance against milestones. The FODQA Plan will include, at a minimum, the following:</p> <ul style="list-style-type: none"> • Engagement Introduction and Overview <ul style="list-style-type: none"> • FODQA Objectives and Goals • FODQA Approach (e.g., methodology, approach to FODQA process improvement) • FODQA Overview <ul style="list-style-type: none"> • Vendor Organization (roles, responsibilities) • Tools, techniques and methodologies required to perform FODQA activities (e.g., quality standards, reporting templates) • FODQA Schedule (Work Breakdown Structure (WBS)) • FODQA Field Office Onsite Schedule • Alignment with all CCWIS project schedules • Major milestones and target dates • FODQA role assignment(s) for each deliverable / task • FODQA Activities, Tasks, and Deliverables • Detailed descriptions aligned to the Solutions' life cycle • Glossary of Terms and Acronyms <p>The format and content of the workplan portion of this report will be made in coordination with the CCWIS PMO team and project tool Smartsheet.</p>
Deliverable FODQA.2 – FODQA Plan Updates	
Required Delivery	Submitted for approval no less than 30 calendar days following approval of CCWIS Technical Solutions Vendor Implementation Release schedule. Updated when CCWIS Project Schedule Release Milestone(s) or Phase(s) are changed.

Description	<p>The FODQA Plan is a dynamic, iterative process that must be periodically updated to meet the current state of the projects. The Vendor will be required to make updates to the FODQA Plan, as necessary, to verify the Plan reflects any changes or additions to the FODQA approach, activities or any CCWIS Project Schedule. Updates may include, but are not limited to:</p> <ul style="list-style-type: none"> • Modified FODQA methodology • New or modified templates • New or modified tools • FODQA Plan (WBS) • Field Office Site Visit Schedule • Personnel modifications
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Deliverable FODQA.3 – Hardcopy Case File Format, Taxonomy and Minimum Requirements

Required Delivery	30 business days prior to initial field office onsite assessment
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Description	<p>This deliverable provides minimum requirements for maintaining a hardcopy casefile for a child welfare client in Hawai'i. This includes at a minimum the following:</p> <ul style="list-style-type: none"> • Definitions of relevant terms pertaining to a casefile; e.g., <ul style="list-style-type: none"> • Electronic File • Physical or Hardcopy File • Active • Inactive • File Taxonomy; e.g. <ul style="list-style-type: none"> • Hardcopy Casefile sections and subsections • Listing of documents that must be present in a hardcopy file • Listing of documents that must either be present in the hardcopy file or the electronic case file • Definitions of relevant terms pertaining to documents within a casefile; e.g., <ul style="list-style-type: none"> • Original Document definition and standards • Official Document definition and standards • Transitory Records definition and standards • Imaging Standards for hardcopy to electronic records • Best Practice Standards for <ul style="list-style-type: none"> • Quality Assurance standards for Hardcopy files • Safekeeping of hardcopy file standards • Instant Messages, Text Messages, and Voice Mails standards • Handling Drug or Alcohol Abuse Treatment Records • Handling Criminal History Record Information (CHRI) <ul style="list-style-type: none"> • Procedures for Handling CHRI <p>This deliverable is created by the FODQA Vendor and is submitted to the HI THRIVE Program Steering Committee for review and approval. Once approved, this document becomes the standard by which hardcopy files are assessed onsite.</p>
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Deliverable FODQA.4 – Field Office Onsite Hardcopy File Review

Required Delivery	Per Approved FODQA Plan
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Description	<p>Plan, coordinate, schedule, conduct & follow-up field office onsite hardcopy file reviews.</p> <p>This deliverable includes the following:</p> <ul style="list-style-type: none"> • Planning for Field Office Onsite Hardcopy Review. Includes <ul style="list-style-type: none"> • Preparation/agency approval of onsite two-day agenda materials • Preparation/agency approval of pre-session orientation materials
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	<ul style="list-style-type: none"> • Scheduling and conducting of pre-session video conference(s) with each field office • Preparation/approval of FODQA vendor costs associated with each onsite review • Proposed FODQA vendor staffing for each onsite review • Coordination of a minimum of two (2), two-day onsite sessions with each field office. (See frequency above for number of locations to use and total number). Includes <ul style="list-style-type: none"> • Scheduling of each onsite review • Conduct each two-day session. Includes <ul style="list-style-type: none"> • Conduction of the approved onsite two-day agenda • Meeting notes of each session • 'Parking lot' items from each session • Daily FODQA vendor / HI THRIVE Core onsite member debrief • Follow-up each two-day session. Includes <ul style="list-style-type: none"> • Scheduling and conducting of post-session video conference(s) with each field office <ul style="list-style-type: none"> • 'What went well' (plus) • 'What can be improved' (delta) • Any lessons learned that can be applied to future sessions
Deliverable FODQA.5 – Field Office Hardcopy Case Record Baseline Assessment	
Required Delivery	Submitted for approval no more than 30 business days following each FODQA Onsite Visit
Description	<p>This deliverable provides an objective assessment of the field office use of hardcopy files in accordance with approved deliverable FODQA.3 Hardcopy Case File Format, Taxonomy and Minimum Requirements. The Report will include a description of the assessment framework, as well as an analysis of the information collected (e.g., interviews, casefiles reviewed). The deliverable will include, at a minimum, the following:</p> <ul style="list-style-type: none"> • Assessment of casefile quality based upon approved hardcopy casefile standard. • Assessment of documentation gaps in casefiles • Assessment of barriers related to casefile readiness that may impact CCWIS deployment • Assessment of readiness for CCWIS deployment • Areas of concern/Risks <ul style="list-style-type: none"> • Risks are prioritized based on agreed upon criteria (e.g., potential and severity) • Recommendations to address areas of concern / Mitigation and Contingency Plans <p>Each FODQA Field Office Hardcopy Case Record Baseline Assessment will be presented to and reviewed by HI THRIVE Core Team, CWSB Program Development and CCWIS Technical Solution Vendor and other stakeholders (e.g., that Field Office & training) as necessary. The Vendor is responsible for ensuring the format and content areas are appropriately addressed, as previously agreed upon with DHS. The Vendor is also responsible for updating the FODQA Field Office Hardcopy Case Record Baseline Assessment to address misrepresented or inaccurate information and redistributing the updated version accordingly.</p>
Deliverable FODQA.6 – Electronic Case File Minimum Requirements	
Required Delivery	30 business days prior to initial field office onsite assessment

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Description	<p>This deliverable provides minimum requirements for what is needed in the electronic casefile for a child welfare client in Hawai'i. This includes at a minimum the following:</p> <ul style="list-style-type: none"> • Definitions of relevant terms pertaining to a casefile; e.g., <ul style="list-style-type: none"> • Electronic File • Physical or Hardcopy File • Active • Inactive • Minimum sets of data required for Federal & State Reporting <ul style="list-style-type: none"> • National Child Abuse and Neglect Data System <ul style="list-style-type: none"> • Data in Legacy Systems needed to be a member of cohort • NCANDS data elements/mapping in legacy system(s) • Adoption and Foster Care Analysis Reporting System <ul style="list-style-type: none"> • Data in Legacy Systems needed to be a member of cohort • AFCARS-F data elements/mapping in legacy system(s) • AFCARS-A data elements/mapping in legacy system(s) • National Youth in Transition Database <ul style="list-style-type: none"> • Data in Legacy Systems needed to be a member of cohort • NYTD data elements/mapping in legacy system(s) • Family First Prevention Services Act <ul style="list-style-type: none"> • Data in Legacy Systems needed to be a member of cohort • FFPSA data elements/mapping in legacy system(s) • Uploaded File Taxonomy; e.g. <ul style="list-style-type: none"> • Document type sections and subsections • Listing of documents that must be present in a hardcopy file • Listing of documents that must either be present in the hardcopy file or the electronic case file • Definitions of relevant terms pertaining to documents within a casefile; e.g., <ul style="list-style-type: none"> • Original Document definition and standards • Official Document definition and standards • Transitory Records definition and standards • Imaging Standards for hardcopy to electronic records • Electronic Casefile Data Practices for <ul style="list-style-type: none"> • Case Notes • Service Plans • Legal Status • Placements/Living Arrangement • Handling Criminal History Record Information (CHRI) <ul style="list-style-type: none"> • Procedures for Handling CHRI <p>This deliverable is created by the FODQA Vendor and is submitted to the HI THRIVE Program Steering Committee for review and approval. Once approved, this document becomes the standard by which electronic casefiles are assessed.</p>
Deliverable FODQA.7 – Field Office Electronic Case Record Baseline Assessment	
Required Delivery	Submitted for approval no more than 30 business days following each FODQA Onsite Visit
Description	This deliverable provides an objective assessment of the field office use of electronic files in accordance with approved deliverable FODQA.6 Electronic Case File Minimum Requirements. The Report will include a description of the assessment framework, as well as an analysis of the information collected (e.g.,

	<p>data analysis, reports reviewed). The deliverable will include, at a minimum, the following:</p> <ul style="list-style-type: none"> • Assessment of electronic data quality based upon approved electronic data standard. • Assessment of documentation gaps in electronic files • Assessment of barriers related to electronic data readiness that may impact CCWIS deployment • Assessment of readiness for CCWIS deployment • Areas of concern/Risks <ul style="list-style-type: none"> • Risks are prioritized based on agreed upon criteria (e.g., potential and severity) • Recommendations to address areas of concern / Mitigation and Contingency Plans <p>Each FODQA Field Office Electronic Case Record Baseline Assessment will be presented to and reviewed by HI THRIVE Core Team, CWSB Program Development and CCWIS Technical Solution Vendor and other stakeholders (e.g., that Field Office & training) as necessary. The Vendor is responsible for ensuring the format and content areas are appropriately addressed, as previously agreed upon with DHS. The Vendor is also responsible for updating the FODQA Field Office Electronic Case Record Baseline Assessment to address misrepresented or inaccurate information and redistributing the updated version accordingly.</p>
Deliverable FODQA.8 – Field Office Hardcopy Case Record Ongoing Assessments	
Required Delivery	Submitted for no more than 5 business days after reporting period closes
Description	<p>Monthly FODQA Hardcopy Casefile Reports are required to provide a continuous, objective assessment of each field office’s progress in addressing gaps in hardcopy casefiles. The FODQA Hardcopy Casefile report can be developed using content from the weekly status reports and must highlight achieved milestones and status for the month.</p> <p>The Reports will include an analysis of any/all technical assistance provided in the reporting period (e.g., meetings, onsite visits, reviews) to assess performance to date. The deliverable will include, at a minimum, the following:</p> <ul style="list-style-type: none"> • Summary of any/all technical assistance provided by field office and type of technical assistance • Assessment of each field office’s health / performance • Compared to baseline metrics • Areas of concern / Risks <ul style="list-style-type: none"> • Risks are prioritized based on agreed upon criteria (e.g., potential and severity) • Recommendations to address areas of concern / Mitigation and Contingency Plans • Review and approval of previous meeting minutes, consolidation of minutes and feedback comments received from participants to the previous month’s meeting. • Overall actual versus planned project progress -quantifiable progress made during the reporting period <p>The Monthly FODQA Hardcopy Casefile Report will be presented to and reviewed by DHS, PMO, CCWIS Technical Solution Vendor and other stakeholders (e.g., ACF) as necessary. The Vendor is responsible for ensuring the format and content areas are appropriately addressed, as previously agreed upon with DHS. The Vendor is also responsible for updating the Monthly FODQA Hardcopy</p>

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	<p>Casefile Report to address misrepresented or inaccurate information and redistributing the updated version accordingly.</p> <p>The format and content of this report will be made in coordination with the CCWIS PMO team and project tool Smartsheet.</p>
Deliverable FODQA.9 – Field Office Electronic Case Record Ongoing Assessments	
Required Delivery	Submitted for no more than 5 business days after reporting period closes
Description	<p>Monthly Field Office Electronic Case Record Ongoing Assessment Reports are required to provide a continuous, objective assessment of each field office’s progress in addressing gaps in electronic data collection. The Field Office Electronic Case Record Ongoing Assessment report can be developed using content from the weekly status reports and must highlight achieved milestones and status for the month.</p> <p>The Reports will include an analysis of any/all technical assistance provided in the reporting period (e.g., meetings, onsite visits, reviews) to assess performance to date. The deliverable will include, at a minimum, the following:</p> <ul style="list-style-type: none"> • Summary of any/all technical assistance provided by field office and type of technical assistance • Assessment of each field office’s health / performance • Compared to baseline metrics • Areas of concern / Risks <ul style="list-style-type: none"> • Risks are prioritized based on agreed upon criteria (e.g., potential and severity) • Recommendations to address areas of concern / Mitigation and Contingency Plans • Review and approval of previous meeting minutes, consolidation of minutes and feedback comments received from participants to the previous month’s meeting. • Overall actual versus planned project progress -quantifiable progress made during the reporting period <p>The Monthly Field Office Electronic Case Record Ongoing Assessment Report will be presented to and reviewed by DHS, PMO, CCWIS Technical Solution Vendor and other stakeholders (e.g., ACF) as necessary. The Vendor is responsible for ensuring the format and content areas are appropriately addressed, as previously agreed upon with DHS. The Vendor is also responsible for updating the Monthly Field Office Electronic Case Record Ongoing Assessment Report to address misrepresented or inaccurate information and redistributing the updated version accordingly.</p> <p>The format and content of this report will be made in coordination with the CCWIS PMO team and project tool Smartsheet.</p>
Deliverable FODQA.10 – CCWIS Field Office Implementation Strategy	
Required Delivery	Submitted for no more than 60 business days prior to CCWIS release
Description	<p>The purpose of this deliverable is to make a recommendation to the CCWIS Vendor and HI THRIVE Core Team the best method for smoothly migrating hardcopy casefile data for each field office when the CCWIS Solution is deployed for Statewide rollout. This plan shall include, at a minimum:</p> <ol style="list-style-type: none"> 1) Detailed recommendations of what hardcopy casefile documents require migration. 2) Estimation of onsite resources needed during implementation. <p>Each FODQA CCWIS Field Office Implementation Strategy will be presented to and reviewed by HI THRIVE Core Team, CWSB Program Development and</p>

	<p>CCWIS Technical Solution Vendor and other stakeholders (e.g., that Field Office & training) as necessary. The Vendor is responsible for ensuring the format and content areas are appropriately addressed, as previously agreed upon with DHS. The Vendor is also responsible for updating the FODQA CCWIS Field Office Implementation Strategy to address misrepresented or inaccurate information and redistributing the updated version accordingly.</p> <p>The format and content of this report will be made in coordination with the CCWIS PMO team and project tool Smartsheet.</p>
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III.D. Deliverables Approach

DHS shall use a deliverables-based approach to determine progress and completion for all FODQA deliverables listed above. DHS and the FODQA Vendor shall establish specific requirements and specifications for these deliverables using the Deliverables Expectation Document (DED) process described below and the process described in the Contract. All FODQA deliverables shall be reviewed and approved using a structured and controlled process. These processes, structures, and tools shall govern all work done by the FODQA vendor on the CCWIS Project. The FODQA Vendor shall agree to these processes, and accept all risks associated to any work completed that is not in compliance with these processes.

III.D.1 Deliverables Expectations Document (DED)

The FODQA Vendor shall complete required DEDs in a template that shall be provided by DHS after selection, and FODQA Vendor deliverables shall adhere to the information within the DED. The FODQA Vendor shall not perform any work on any deliverable until the DED has been approved in writing by DHS.

As each deliverable is submitted, the FODQA Vendor shall include a copy of the associated DED.

III.D.2 Controlled Correspondence

In order to track and document requests for decisions and/or information and the subsequent response to those requests, DHS and the FODQA Vendor shall use Controlled Correspondence.

Each Controlled Correspondence document shall be signed by the DHS Project Manager (or designee) and the FODQA Vendor Project Manager (or designee). No Controlled Correspondence document shall be effective until the signatures of both are attached to the document.

The Controlled Correspondence process may be used to document mutually agreeable operational departures from the Requirements and/or changes to the Requirements. Controlled Correspondence may be used to document the cost impacts of proposed changes, but Controlled Correspondence shall not be used to change pricing.

Controlled Correspondence shall not be the basis of a claim for adjustment of pricing. Any changes that involve a change in pricing shall be by a Change Order or amendment to the Contract.

Controlled Correspondence documents shall be maintained by both DHS and the Contractor in ongoing logs and shall become part of the normal status reporting process.

III.D.3 Deliverable Acceptance

All FODQA Vendor deliverables are subject to review by DHS prior to final acceptance and payment, if applicable. Where appropriate in DHS's discretion, the FODQA Vendor shall perform a walkthrough of a draft version of any Deliverables Acceptance Document (DAD), DED, or deliverable with all staff as requested by DHS in order to solicit feedback prior to Acceptance.

Acceptance of all FODQA Vendor deliverables shall occur via a DAD in a template that shall be provided by DHS after selection to be completed for each deliverable by the FODQA Vendor.

Review time shall depend on the complexity of the deliverables. DHS shall have no less than ten (10) business days to complete its review of the deliverable. In the event of the rejection of any deliverable, the FODQA Vendor shall be notified in writing via Controlled Correspondence or a notice in accordance with the DHS Contract Deliverable Submission, Review and Approval Process, giving the specific reason(s) for rejection. Unless agreed by DHS, the FODQA Vendor shall have five (5) business days to correct the rejected deliverable and return it to DHS via Controlled Correspondence. Failure by DHS to complete activities within the timeframes noted does NOT constitute acceptance, approval, or completion unless otherwise agreed upon in writing by DHS and the FODQA Vendor. The State's acceptance of a deliverable or the delay of a due date shall be made in writing by the DHS Project Manager.

All payment requests (e.g., invoices) shall include copies of the relevant DADs signed by the DHS Project Manager and/or designee authorized to approve the deliverable. Deliverables, along with associated approved DADs, shall be tracked by the FODQA Vendor in a tracking tool approved by DHS.

III.E. Vendor Staffing

DHS understands that staffing of this Project shall be critical to its success, and DHS shall closely evaluate Bids for the appropriate consideration, and structure of the proposed staffing model including the identified Key Personnel. DHS shall require that the Bidder brings the minimum required staffing to the Project.

Key Personnel obligations are indicated in the section below. The Bidder shall clearly describe the roles of each proposed staff in the phases in which they shall be participating. If the Bidder's Key Personnel includes the use of subcontractors, regardless of the actual percentage work done by the subcontractor, DHS requires the Prime Bidder to be responsible for 100% of the work, unless otherwise authorized by DHS.

III.E.1 Key Personnel and Staffing Changes

The term "Key Personnel," for purposes of this procurement, means FODQA Vendor staff deemed as being both instrumental, and essential to the FODQA Vendor's satisfactory performance of all requirements contained in this IFB. FODQA Vendor Key Personnel shall be the primary team that delivers FODQA services being procured. As these staff members are deemed critical to the success of this initiative, they shall be full-time, and dedicated solely to FODQA for the CCWIS Project.

The Bidder shall define the approach to staffing as a part of its Bids, using Response Template T-3 - Bidder Project Organization and Staffing, and shall also include names, and qualifications for proposed Key Personnel as part of its Bid, using Response Template T-4 - Staff Experience, to clearly demonstrate the proposed Key Personnel's ability to perform the role as described. The Bidder shall confirm Key Personnel have, and maintain, relevant current license(s) and/or certification(s). The Bidder may provide alternative solutions though any changes shall be

approved by DHS. Changes to the proposed positions and responsibilities shall only be allowed with prior written permission from DHS. If the Bidder believes that an alternative organizational design could improve service levels or decrease costs, a discussion of these options and their benefits shall be included in the Response Templates for this IFB.

The FODQA Vendor shall be committed to keeping staff turnover at a minimum for the duration of the Project. The FODQA Vendor shall provide a list of its staff, qualifications, and work experience at the beginning of the Project. The list shall be updated and shared with DHS whenever there are personnel changes.

The FODQA Vendor shall provide DHS with written notification of vacancies of Key Personnel within two business days of receiving the individual's resignation notice, the FODQA Vendor's notice to terminate an individual, or the position otherwise becoming vacant. Replacements for Key Personnel shall have qualifications that meet or exceed those specified in this section, shall complete all training required by DHS (i.e., security procedures, etc.), and shall be subject to Acceptance by DHS. The FODQA Vendor shall seek and receive DHS approval before hiring or replacing any Key Personnel. The FODQA Vendor shall remove and replace Key Personnel, if requested by DHS, within two weeks of the request for removal. The FODQA Vendor shall provide DHS with status update reports every week on the progress of the replacement candidate recruiting process until a qualified candidate is hired. The FODQA Vendor shall have in place a qualified replacement within (60) calendar days of the last day of employment of the departing Key Personnel. During the recruitment and training period, the FODQA Vendor shall provide an interim replacement for all Key Personnel, subject to Acceptance by DHS.

III.E.2 FODQA Vendor Key Personnel - Project

Table 5. FODQA Vendor Key Personnel Roles for the Project

Title	Roles and Responsibilities	Minimum Qualifications
Engagement Director / Executive	1) Serves as the primary point of contact with DHS leadership, governance bodies, and other State Executive Sponsors for activities related to contract administration, overall project management, and scheduling, correspondence between DHS and the FODQA Vendor, dispute resolution, and status reporting to DHS for the duration of the Contract. 2) Is authorized to commit the resources of the FODQA Vendor in matters pertaining to the implementation performance of the Contract. 3) Is responsible for addressing any issues that cannot be resolved with the FODQA Vendor's Project Manager. 4) Is responsible for all subcontractor relationships.	1) Minimum of five years direct project oversight and authority over projects more than five million dollars. 2) Special consideration shall be given to those who have previously managed Child Welfare Systems FODQA accounts. <i>(Does not need to be dedicated 100% to the Project.)</i>

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Title	Roles and Responsibilities	Minimum Qualifications
FODQA Project Manager	<ol style="list-style-type: none"> 1) Leads the remote FODQA effort for the HI THRIVE project. 2) Is responsible for managing and facilitating the FODQA effort by using project management processes, organizing the FODQA effort, and managing the FODQA team activities consistent with the approved work plan. 3) Is responsible for scheduling, reporting FODQA activities, coordinating use of FODQA resources, identifying risks and issues, solving problems, and facilitating FODQA services. 4) Hosts weekly FODQA status meetings, monthly milestone meetings, as well as interim meetings. 5) Assigns FODQA Vendor staff to the above meetings as appropriate. 6) Develops and distributes an agenda and minutes for each meeting. 7) Advises DHS regarding best practices, and recommends modifications to business processes, which improve the overall operations. 8) Immediately notifies HI THRIVE Project Manager on any deviation from agreed upon scope, schedule, budget, or level of quality. 9) Develops and supports oversight reports sent to the State and Federal partners. 10) Verifies alignment of all CCWIS Project FODQA standards with Program, State and Federal expectations 11) Provides the leadership and creation of standards and processes required for the successful execution of FODQA activities. 12) Manages CCWIS Project FODQA activities and provides reports accordingly. 13) Supports delivery and execution of all tasks and deliverables specified within this Scope of Work for the CCWIS Project 14) Verifies all FODQA deliverables meet the appropriate quality standards. 	<ol style="list-style-type: none"> 1) Current Project Management Professional (PMP) certification from the Project Management Institute (PMI), or Project Management Roles in 3+ CCWIS/TCWIS Projects as equivalent. 2) A total of five years of demonstrated experience in: <ol style="list-style-type: none"> a. Project Management of a project that encompassed FODQA services for the full system development life cycle from initiation through post implementation within a Health and Human Services (HHS) Agency in a State or other US territory; and/or b. Account Management for a public sector social services division, including a minimum of three years of Child Welfare Systems experience in a state similar in scope and size to Hawaii. <p><i>(Does not need to be dedicated 100% to the Project.)</i></p>

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Title	Roles and Responsibilities	Minimum Qualifications
FODQA CCWIS Program Functional Lead	<ol style="list-style-type: none"> 1) Provides input on the FODQA Plan and Work Plan. 2) Is primarily responsible for Hardcopy casefile standards. 3) Is primarily responsible for development of functional, programmatic (e.g., policy and procedures, operations, usability, performance, training, engagement, etc.) aspects of field office FODQA assessments. 4) Plans, coordinates, conducts and follows up onsite reviews of hardcopy casefiles. 5) Conducts onsite & remote technical assistance geared to deficiencies found during onsite field reviews. 6) Proactively identifies project and program risks and issues, then proposes recommended courses of action as necessary as they relate to field office processes and procedures. 7) Engages and coordinates field office SMEs to execute FODQA tasks as needed. 8) Provides input on status reports. Supports other tasks as identified by the FODQA Project Manager. 	<ol style="list-style-type: none"> 1) Twenty (20) years of experience leading or performing analysis and implementing practice, policy and process that support child welfare data and data systems; 2) Twenty (20) years of experience supporting Child Welfare agencies in practice and data decision making, using data to inform child welfare practice 3) Minimum of ten (10) years of experience working as a Subject Matter Expert, preferably working with multiple agency sites. 4) Minimum of ten (10) years of experience implementing culturally responsive and respectful Child Welfare practice models e.g. Federally recognized Tribe, Alaska Native or Pacific Island) 5) Experience with Kinship, Foster Care Placement, Families First, ICWA, Governance and other Federal programs relating to specialized populations 6) Experience conducting compliance analysis for Child Welfare practice, policy and mandated data sets (NCANDS, AFCARS & NYTD) for Reporting 7) State SACWIS/CCWIS Project experience 8) MSW or twenty (20) years of experience in Child Welfare or HHS 9) Ability for this position and FODQA CCWIS Onsite Program Functional Analyst to virtually participate in, and travel to when scheduled, to all 38 Child Welfare Branch Units for onsite review & ongoing assessments within prescribed initial contract duration. <p><i>(Must be dedicated 100% to the Project.)</i></p>

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Title	Roles and Responsibilities	Minimum Qualifications
FODQA CCWIS Program Functional Analyst	<ol style="list-style-type: none"> 1) Provides input on the FODQA Plan and Work Plan. 2) Is primarily responsible for Hardcopy casefile standards. 3) Is primarily responsible for development of functional, programmatic (e.g., policy and procedures, operations, usability, performance, training, engagement, etc.) aspects of field office FODQA assessments. 4) Plans, coordinates, conducts and follows up onsite reviews of hardcopy casefiles. 5) Conducts onsite and remote technical assistance geared to deficiencies found during onsite field reviews. 6) Proactively identifies project and program risks and issues, then proposes recommended courses of action as necessary as they relate to field office processes and procedures. 7) Engages and coordinates field office SMEs to execute FODQA tasks as needed. 8) Provides input on status reports. 9) Supports other tasks as identified by the FODQA Project Manager. 	<ol style="list-style-type: none"> 1) Ten (10) years of experience leading or performing analysis and implementing practice, policy and process that support state government or child welfare data and data systems; 2) Eight (8) years of experience supporting Child Welfare agencies in practice and data decision making, using data to inform child welfare practice 3) Minimum of ten (10) years of experience working as a Subject Matter Expert, preferably working with multiple agency sites. 4) Minimum of eight (8) years of experience implementing culturally responsive and respectful Child Welfare practice models (e.g. Federally recognized Tribe, Alaska Native or Pacific Island) 5) Minimum of eight (8) years Experience with Kinship, Foster Care Placement, Families First, ICWA, Title IV-E Eligibility and other Federal programs relating to specialized populations 6) Experience conducting compliance analysis for Child Welfare practice, policy and mandated data sets (NCANDS, AFCARS & NYTD) for Reporting 7) State CCWIS Project experience 8) MSW or fifteen (15) years of experience in Child Welfare or State HHS government 9) Ability for this position and FODQA CCWIS Onsite Program Functional Lead to virtually participate in, and travel when scheduled, to the Child Welfare Branch field offices for onsite initial review & ongoing assessments within prescribed initial contract duration. <p><i>(Must be dedicated 50% to the Project.)</i></p>

Title	Roles and Responsibilities	Minimum Qualifications
FODQA Data Analyst	<ol style="list-style-type: none"> 1) Provides input on the FODQA Plan and Work Plan. 2) Is primarily responsible for Electronic casefile standards. 3) Is primarily responsible for development of technical and data aspects (e.g., legacy system analysis, etc.) aspects of field office FODQA assessments. 4) Conducts data reviews of field office electronic casefile reviews. 5) Conducts data technical assistance geared to deficiencies found in field office data reviews. 6) Proactively identifies project and program risks and issues, then proposes recommended courses of action as necessary as they relate to field office electronic data collection processes and procedures. 7) Engages and coordinates field office SMEs to execute FODQA tasks as needed. 8) Provides input on status reports. 9) Supports other tasks as identified by the FODQA Project Manager. 	<ol style="list-style-type: none"> 1) Five (5) years of data quality experience in large-scale state information systems 2) Five (5) years of data migration experience in large-scale state information systems 3) Five (5) years of vendor management experience in large-scale state information systems 4) Five (5) years of quality Assurance / Quality Control experience in large-scale state information systems 5) Five (5) years experience with Kinship, Foster Care Placement, Families First, ICWA and other Federal programs relating to specialized populations 6) Five (5) years experience conducting compliance analysis for Child Welfare practice, policy and mandated data sets (NCANDS, AFCARS & NYTD) for Reporting with a Title IVE State, Tribe or other US Territory. 7) Five (5) years state CCWIS Project experience 8) Experience with at least two state CCWIS Projects 9) Experience with Hawai'i Child Welfare Systems CPSS and SHAKA data systems. <p><i>(Must be dedicated 100% to the Project.)</i></p>

III.F. Work Environment

III.F.1 Facilities, Equipment, and Location of Contracted Personnel

The FODQA Vendor may conduct their services from their chosen remote location within the United States, provided they have reliable phone and internet service, and are available by phone, email and video conference during regular Hawaii state working hours Monday-Friday, 7:45 a.m.-4:30 p.m. HST. All staff shall be located, and all work performed in the United States of America.

DHS is not requiring the FODQA project work to be conducted on-island, with the exception of the Field Office data quality reviews outlined in the deliverables. The FODQA vendor must include a travel budget allowance calculated based on the required number of site visits, and the required 2-day duration of each visit. The vendor is required to assign project staff to facilitate the data quality activities for each onsite field office visit. The State plans to have one or more HI THRIVE project staff accompany the vendor on each field office visit. The activities associated with each onsite review is approved by DHS under *Deliverable FODQA.4 – Field Office Onsite Hardcopy File Review* in Table 4. List of FODQA Deliverables.

The FODQA vendor will be allowed to invoice for 25% of travel budget allowance at the time of Deliverable FODQA.1 – FODQA Plan approval, and once every six months following for the duration of the 2-year contract, for a maximum of two travel budget invoice requests per project year. The FODQA Vendor is required to provide a running total of travel expenditure totals in the monthly status report.

All equipment (e.g., laptops, printers, etc.) shall be supplied by the FODQA Vendor and shall establish appropriate protocols in alignment with Federal and State legal and regulatory requirements to confirm the staff, physical property and facility security, data security, and confidentiality safeguards are maintained. The FODQA Vendor shall be responsible for providing, installing, and configuring all workstations, desktop software, and supporting peripherals necessary at its facility for this Project.

The Vendor staff shall be available to participate in project-related meetings as scheduled by DHS. Work shall be performed during normal State business hours, Monday through Friday 7:45 a.m. to 4:30 p.m. HST, except federal, state, and local holidays.

IV. Bid Evaluation

DHS shall use a structured and objective evaluation process to select the successful FODQA Vendor. The award shall be made to the lowest cost responsive, responsible bidder and shall be based on the acceptability criteria set forth in the IFB.

IV.A. Evaluation Criteria

DHS shall perform an acceptability evaluation to determine whether the bidder meets minimum qualifications for key personnel and minimum staffing levels and minimum experience qualifications, IV.C.

The acceptability evaluation is not conducted for the purpose of determining whether one bidder's item is superior to another but only to determine that a bidder's offer is acceptable as set forth in the IFB.

Any bidder's offering which does not meet the acceptability requirements shall be rejected as "nonresponsive".

IV.B. Compliance Screening

DHS shall perform a screening of all bids received. Unsigned bids and bids that do not include all required forms and sections may be subject to disqualification. Screening shall check for (1) completeness, thoroughness, and proper formatting of the bid and Response Templates, and (2) minimum qualification requirements defined in Section IV.C.

DHS reserves the right to waive only minor irregularities errors that are correctable by Bidders after the bid submission deadline (e.g., minor irregularities such as math errors and typographical errors) in bids. Where DHS may waive minor irregularities, the waiver shall in no way excuse the Bidder from full compliance with IFB Requirements and other Contract requirements if the Bidder is awarded the Contract.

IV.C. Minimum Mandatory Qualifications

Bidders shall clearly demonstrate compliance with the Minimum Mandatory Qualifications listed below in order for their bids to be responsive:

- IV.C.1** The FODQA Bidder (Prime only) must have at least fifteen (15) years' experience in hardcopy and electronic case management systems for a Child Welfare (CW) Agency in a Title IVE, State, Tribe, or other US territory.
- IV.C.2** Every FODQA Vendor Key Personnel (III.E.2 Table 5) submitted must meet minimum qualifications and the required staffing level for duration indicated.
- IV.C.3** The FODQA Bidder (Prime only) must disclose annual revenue details using Template T-2 – Bidder Experience.

The Bidder shall demonstrate compliance with the above Minimum Mandatory Qualifications in Template T-1 - Cover Letter and Executive Summary. FODQA Bidder bids that do not meet the above Minimum Mandatory Qualifications will be determined “nonresponsive” and further evaluation of the bid shall not be performed.

IV.D. Bid Evaluation Process

The award shall be made to the lowest responsive, responsible bidder and shall be based on the acceptability criteria set forth in the IFB.

V. Vendor Selection and Contract Award

DHS shall notify the successful Bidder and all other Bidders that have submitted Bids in writing of the selection decision.

Award if any, resulting from this solicitation shall be posted to the State of Hawaii eProcurement system and the Hawaii Awards and Notices Data System (HANDS) on the State Procurement Office website on Contract Awards at <http://spo.hawaii.gov>.

DHS may not provide information regarding progress of the procurement. Bidders shall not request information on the status of the procurement prior to posting of the award.

V.A. Notice of Award

A Statement of Findings and Decision (Notice of Award) shall be provided to all responsive and responsible Bidders for the award or non-award of a contract upon completion of the evaluation of all bids. The Statement shall provide information regarding only the individual Bidder, not information about the other Bidders.

Any contract resulting from this IFB is subject to the approval of the State Department of the Attorney General as to form and to all further approvals, including the approval of the Director, as required by statute, rule, regulation, order, or other directive.

No work is to be undertaken by a Bidder awarded a contract prior to the contract start date. The State is not liable for any costs incurred prior to the official contract start date.

V.B. Contract Execution

The successful Bidder shall be required to enter into a formal written Contract with DHS in accordance with the laws, rules, and regulations of the State of Hawaii. The funds available for this procurement are limited. DHS reserves the right to contract for all or portions of the services being solicited whichever appear to be in the best interest of State.

If the successful Bidder is other than a sole proprietorship, it shall submit satisfactory evidence (certificate or corporate resolution, power of attorney or other such evidence of authority) of the signer's authority to execute on the contract date on behalf of the successful Bidder.

V.C. Availability of Funds

The contract award and any allowed extension thereof is subject to allotments made by the State Director of Finance pursuant to HRS Chapter 37 and subject to the availability of State and/or Federal funds.

If funding is delayed or reduced, or is not appropriated in full, DHS shall have the right to partially or fully terminate or suspend any contracts under this IFB. If DHS does not exercise the right to fully terminate or suspend, DHS shall determine which aspects of this IFB shall move forward and which services shall be performed.

V.D. Notice to Proceed

Any work performed by the successful Bidder prior to receipt of a "Notice to Proceed" letter or a fully executed copy of the Contract shall be at the selected Bidder's own risk and expense. The State is not, and shall not be liable for any work, contract costs, expenses, loss of profits or damages whatsoever incurred by the successful Bidder prior to the receipt of a fully executed Contract.

V.E. Term of Contract

This is a multi-term contract solicitation that has been deemed to be in the best interest of State. The award shall be represented by a Firm Fixed Price contract. Funds are currently available only for the initial term of the Contract. The contractual obligation of the parties in each fiscal period succeeding the first initial term is subject to the appropriation and availability of funds to DHS.

The initial term of the contract shall be for a term of two (2) years, with an option to extend for two (2) six (6) month terms, with a maximum length of three (3) years for a period starting on the official commencement date of the contract. If an option to extend is mutually agreed upon, the FODQA Vendor shall be required to execute a supplement to the Contract for each agreed upon extension period.

V.F. Process for Filing a Protest

Pursuant to HRS § 103D-701 and HAR § 3-126-4, any actual or prospective bidder who is aggrieved in connection with the solicitation or award of a contract may protest to the chief procurement officer or a designee as specified in the solicitation.

All protests shall be submitted in writing to the following address:

Michael Armstrong

Department of Human Services
Social Services Division
1010 Richards Street, Suite 216
Honolulu, HI 96813
E-mail: marmstrong@dhs.hawaii.gov

V.G. Responsibilities of Vendors

Bidder is advised that in order to be awarded a contract under this solicitation, Bidder shall be required to be registered to do business in Hawaii and to be compliant with all laws governing entities doing business in the State including the following chapters and pursuant to HRS §103D-310(c):

- V.G.1** Chapter 237, HRS, General Excise Tax Law;
- V.G.2** Chapter 383, HRS, Hawaii Employment Security Law;
- V.G.3** Chapter 386, HRS, Worker's Compensation Law;
- V.G.4** Chapter 392, HRS, Temporary Disability Insurance;
- V.G.5** Chapter 393, HRS, Prepaid Health Care Act; and
- V.G.6** HRS §103D-310(c), Certificate of Good Standing (COGS) for entities doing business in the State.

The State shall verify compliance with the above statutes.

The Hawaii Compliance Express (HCE) is an electronic system that allows vendors, contractors, or service providers doing business with the State to demonstrate compliance quickly and easily with applicable laws relating to tax, labor, and business registration. It is an online system that replaces the necessity of obtaining paper compliance certificates from the Department of Taxation, Federal Internal Revenue Service; Department of Labor and Industrial Relations, and Department of Commerce and Consumer Affairs.

Bidders are encouraged to register with HCE prior to submitting an offer, at <https://vendors.ehawaii.gov>.

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VI. Glossary

A

Access to Records (45 CFR § 75.364) (a) *Records of non-Federal entities.* The HHS awarding agency, Inspectors General, the Comptroller General of the United States, and the pass-through entity, or any of their authorized representatives, shall have the right of access to any documents, papers, or other records of the non-Federal entity which are pertinent to the Federal award, in order to make audits, examinations, excerpts, and transcripts. The right also includes timely and reasonable access to the non-Federal entity's personnel for the purpose of interview and discussion related to such documents.

(b) Only under extraordinary and rare circumstances would such access include review of the true name of victims of a crime. Routine monitoring shall not be considered extraordinary and rare circumstances that would necessitate access to this information. When access to the true name of victims of a crime is necessary, appropriate steps to protect this sensitive information shall be taken by both the non-Federal entity and the HHS awarding agency. Any such access, other than under a court order or subpoena pursuant to a bona fide confidential investigation, shall be approved by the head of the HHS awarding agency or delegate.

(c) *Expiration of right of access.* The rights of access in this section are not limited to the required retention period but last as long as the records are retained. HHS awarding agencies and pass-through entities shall not impose any other access requirements upon non-Federal entities.

Access to Systems and Records (45 CFR § 95.615) The State agency shall allow the Department access to the system in all of its aspects, including pertinent state staff, design developments, operation, and cost records of contractors and subcontractors at such intervals as are deemed necessary by the Department to determine whether the conditions for approval are being met and to determine the efficiency, economy and effectiveness of the system.

Administration for Children and Families (ACF) The division of the Federal Department of Health & Human Services that promotes the economic and social wellbeing of children, families, and individuals.

Administrative Appeals Office (AAO) An organization within DHS that provides administrative due process hearings in contested cases for the Department.

Adult Protective and Community Services Branch (APCSB) State of Hawaii Department of Human Services, Social Services Division includes APCSB which provides protective services for vulnerable adults and home and community-based services to prevent premature institutionalization of clients.

Agency of One A DHS initiative to move from a solely *program-centric* approach focused on discrete outputs to a *person- and family-centric* approach focused on access to and delivery of multiple coordinated services to improve outcomes, cost, and quality of DHS programs and services.

Application Systems Integration (ASI) The design, development, implementation and deployment of software, equipment, telecommunication facilities, and/or services.

Application Systems Integrator (ASI) Vendors refers to any and all vendors, such as the CCWIS Vendor and Unisys, implementing software applications.

Audit, Quality Control and Research Office (AQCRO) An organization within DHS that supports the Financial Evaluation Staff, Quality Control Staff, and the Research Staff.

B

Benefit, Employment and Support Services Division (BESSD) The largest division in the Hawaii Department of Human Services. Staff and administrators provide a continuum of services, through nine programs that serve different populations, aimed at providing clients with monthly benefits to assist them with such essentials as food, shelter, childcare, employment support, work-training, and dependency diversion and prevention.

Benefits Eligibility Solution (BES) The Solution designed, developed, and implemented to provide integrated eligibility and benefits management capabilities that support the BESSD programs.

Budget, Planning and Management Office (BPMP) An organization within DHS that supports the Budget Staff, Planning Staff, and the Program and Management Evaluation Staff.

C

Case A Case refers to an individual's or household's interaction with SSD; all members of a household are included in a single case.

Certified Information Systems Security Professional (CISSP) An independent information security certification granted by the International Information System Security Certification Consortium (ISC2).

Child Abuse Prevention and Treatment Act (CAPTA) The CAPTA is a key piece of legislation that guides child protection. CAPTA, in its original inception, was signed into law on January 31, 1974. It was reauthorized in 1978, 1984, 1988, 1992, 1996, and 2003, and with each reauthorization, amendments have been made to CAPTA that have expanded and refined the scope of the law.

Child Protective Services System (CPSS) The primary legacy system for CWSB, CPSS is mainframe based using Natural and ADABAS under CICS transaction Monitor.

Child Support Enforcement Agency (CSEA) CSEA is a division within the Department of the Attorney General. The primary goal of the CSEA is to ensure that the children involved in child support cases have ongoing financial support from both parents, by providing a system for payments and disbursements of court-ordered child support².

Child Welfare Services (CWS) State of Hawaii Department of Human Services, Social Services Division CWS programs include family strengthening and support, child protection, foster care, adoption, independent living, and licensing of resource family homes, group homes, and child-placing organizations.

Child Welfare Services Branch (CWSB) The branch within the Social Services Division that provides Child Welfare Services.

Client A person who is receiving services from CWSB.

Code of Federal Regulations (CFR) Official legal print publication containing the codification of the general and permanent rules published in the *Federal Register* by the departments and agencies of the Federal Government.

Comprehensive Child Welfare Information System (CCWIS) Started from the Title XIII, Section 13713, ENHANCED MATCH FOR AUTOMATED DATA SYSTEMS, of the Omnibus Budget Reconciliation Act (OBRA) of 1993 (Public Law 103-66), enacted on August 19, 1993.

² Hawaii.gov website. Retrieved 14:05, February 13, 2018 from <http://ag.hawaii.gov/csea/>

CCWIS is required to be a comprehensive automated case management tool that supports social workers' foster care and adoptions assistance case management practice.

Comprehensive Child Welfare Information System Engagement (Engagement) The scope of work that completes ASI of the CCWIS Solution; M&O of the CCWIS Solution; and retirement of the SSD legacy systems.

Comprehensive Child Welfare Information System Maintenance and Operations The M&O activities for the CCWIS Solution.

Comprehensive Child Welfare Information System Project/Solution (Project) The ASI of the CCWIS Solution.

Comprehensive Child Welfare Information System Technical Solution A system to implement a case management information system to support Hawaii's child welfare program needs in accordance with requirements of a Comprehensive Child Welfare Information System (CCWIS) (as defined in the Glossary) compliant with 45 CFR §§1355.50 through 1355.59.

Commercial Off-The-Shelf (COTS) Software or hardware that is ready-made and available for sale or licensing to the general public. Such software and hardware are often designed to be implemented easily into existing systems without the need for customization.

Contract The terms and conditions, all attachments to this Contract, and documents incorporated into this Contract by this reference, the IFB, and the Response.

Contract Administrator The DHS State role responsible for management of the Contract between DHS and the awarded FODQA Vendor.

Contractor The selected FODQA Vendor performing Services pursuant to this Contract, including the Contractor's owners, members, officers, directors, and employees. Also referred to as the "Bidder" and the "Vendor" in the IFB.

CCWIS M&O specifically refers to the ongoing M&O of the CCWIS Solution

CCWIS M&O Team is a collaboration of Enterprise Software Integrator (ESI) Vendor, CCWIS Vendor, and State

CCWIS Project or **Project** specifically refers to the ASI activities for the CCWIS Solution

CCWIS Solution or **Solution** The set of capabilities that shall support SSD's Child Welfare Services Branch (CWSB) and all products and Services required for (1) configure, customize as needed, implement, and deploy a new CCWIS; (2) maintain and operate the CCWIS; and (3) perform other obligations for the CCWIS, all as described in the Contract.

D

Defects or **Deficiencies** A failure or omission in a Service or Deliverable, which causes it not to conform to its Specifications, or a failure to conform to reasonable commercial or industry standards for appearance, quality, functionality, or format. Also referred to as an issue, incident, problem, error or similar term in the IFB.

Deliverables Acceptance Document (DAD) The form that State shall use, approve, and sign to provide Acceptance of a Deliverable or Services to Contractor.

Deliverables Expectations Document (DED) The document that describes Acceptance Criteria for each Deliverable and Service subject to Acceptance Tests. Each DED is a Deliverable.

Department of Accounting and General Services (DAGS) DAGS is responsible for managing and supervising a wide range of State programs and activities. Responsibilities include but are not limited to: develops and maintains State's accounting systems (e.g., FAMIS); verifies expenditures before making payments; and records and reports on State's financial transactions.

Department of Business, Economic Development and Tourism (DBEDT) Hawaii's resource center for economic and statistical data, business development opportunities, energy and conservation information, and foreign trade advantages.

Department of Health and Human Services (HHS) The U.S. Department of Health and Human Services is the U.S. government's principal agency for protecting the health of all Americans and providing essential human services, especially for those who are least able to help themselves. HHS is responsible for almost a quarter of all federal outlays and administers more grant dollars than all other federal agencies combined.

Department of Human Services (DHS) DHS is the second largest department in the State of Hawaii that manages an annual budget of \$2.7 billion. DHS has four divisions: Benefit, Employment and Support Services Division; Social Services Division; Med-QUEST Division; and Division of Vocational Rehabilitation. DHS also has administratively attached agencies and commissions: the Hawaii Public Housing Authority, Office of Youth Services, Hawaii State Commission on the Status of Women, and State Commission on Fatherhood.

Department of Taxation (DOTAX) Tax agency for the Hawaii state government.

Deployment The process for installing the fully Operational System and thereafter to all applicable State Sites or moving the System from one location or environment to another during the term of this Contract. Also referred to as Roll-out in the IFB and Response.

DHS Enterprise Program (Program) A DHS-wide initiative that serves to coordinate IT and non-IT projects to support the vision of an Agency of One. Leverages the technology capabilities of the DHS Enterprise Platform to provide Department-wide information sharing and consistency in capabilities.

Division of Vocational Rehabilitation (DVR) DVR is a division of DHS which administers a state-federal program for individuals with disabilities who require assistance to prepare for, secure, retain or regain employment. The Hawaii DVR administers three programs that have separate but related functions to provide for the rehabilitation needs of people with disabilities to secure employment, and to lead full, and productive lives. The underlying philosophy and goal of the DVR is that through employment, individuals with disabilities are empowered toward economic self-sufficiency, independence, and inclusion and integration into society.

E

F

Family Strengthening Services (FSS) A type of service that is provided by a private nonprofit organization to families who have been assessed to have NO safety issues, and very low risks of abuse and neglect. Family Strengthening Services help families provide a safe home for their children, promote positive parenting, and help prevent child abuse and neglect. Families receive free, short-term, home visiting services. These voluntary services are designed to provide support and help maintain and improve individual and family function by improving parenting skills.

Federal Poverty Line (FPL) A measure of income level issued annually by the Department of Health and Human Services. FPL is used to determine a person's eligibility for certain programs and benefits.

Financial Accounting Management and Information System (FAMIS) FAMIS is the State of Hawaii accounting System.

Firm Fixed Price The amount of payment that does not depend on the number of resources or time expended.

Fiscal Management Office (FMO) provides staff assistance and advisory services for the administrative functions of fiscal management.

Fiscal Year (FY) The State of Hawaii's fiscal year

G

General Excise Tax (GET) The General Excise Tax is levied against a business's gross receipts for the privilege of doing business in Hawaii.

H

Hawaii Administrative Rules (HAR) Administrative rules by which the Department implements programs it administers.

Hawaii Compliance Express (HCE) Electronic system that provides vendors, contractors and service providers doing business with state or county agencies to quickly and easily document that they are compliant with applicable laws.

Hawaii Revised Statutes (HRS) Statutes published by the State of Hawaii that apply to State organizations.

Hawaii Standard Time (HST) The local time in the State of Hawaii.

Health and Human Services (HHS) May refer to either the Federal agency of this name, or the domain of organizations involved in the delivery of healthcare and human services benefits and care to citizens.

I

Field Office Data Quality Assessment & Preparation for CCWIS Activities (FODQA) Third party vendor that oversees the Project activities of the CCWIS Vendor to ensure quality and timely delivery of its products and services.

Information and Communication Services Division (ICSD) A division of the Department of Accounting and General Services that plans, coordinates, organizes, directs, and administers information processing and telecommunication services to all agencies of the State of Hawaii.

Information Technology (IT) The application of computers and telecommunications equipment and software to store, retrieve, transmit, and manipulate data, often in the context of a business or other enterprise. It is also used as a synonym for computers and computer networks, and it also encompasses other information distribution technologies.

Internal Revenue Service (IRS) Tax agency for the federal government.

Invitation for Bid (IFB) SSD-CCWIS-24-07A, dated January 5, 2024, and all addenda thereto which are incorporated into the IFB.

J

K

Kauhale On-Line Eligibility Assistance (KOLEA) KOLEA has been established to support MAGI eligibility determination for the State's Medicaid program known as Med-QUEST.

KEIKI is Hawaii's Child Support Enforcement Agency's (CSEA's) automated system.

L

Limited English Proficiency (LEP) Persons who are unable to communicate effectively in English because their primary language is not English, and they have not developed fluency in the English language.

M

Maintenance and Operations (M&O) Maintenance and support Services which shall be performed by Contractor following the Warranty Period for each Deliverable, each Function, each Release, Services and the System, in whole and in part, including but not limited to Functions, Releases and other Deliverables and Services that previously received Acceptance and that are integrated into the System and which are described as such in the IFB, the Response, General Conditions of the Contract. Also referred to as Maintenance and Operations (M&O) in the IFB.

Management Services Office (MSO) An organization within DHS that provides research, quality assurance, program and financial evaluation, and assessment capabilities that enable DHS to oversee its programs and make appropriate decisions concerning those programs.

Med-QUEST Division (MQD) A division within the State of Hawaii DHS, it provides Medicaid and Child Health Insurance Program health coverage, primarily through managed care plans, to low-income families, children, and individuals.

N

O

Office of Information Technology (OIT) The Office of Information Technology is responsible for the overall administration, planning, direction, management, development, implementation, and maintenance of all information technology (IT), and information systems processing for the Department of Human Services statewide. OIT provides project planning and management, business Software application systems development and maintenance, systems software and hardware management, telecommunications and network management and support, and technical training; and operates the Data Center including computing facilities management, data control, and technical help desk functions.

Organizational Change Management (OCM) A framework for managing the effect of new business processes, changes in organizational structure or cultural changes within an enterprise.

P

Point of Contact (POC) An individual that is responsible for all communication regarding the IFB. There is a DHS POC identified, and each Bidder shall name a Bidder POC.

Program See "DHS Enterprise Program"

Program Management Office (PMO) An organization within DHS that coordinates projects leveraging the DHS Enterprise Platform.

Project The ASI of the Solution. See "Comprehensive Child Welfare Information System Project"

Project Management Institute (PMI) A certifying agency that specializes in project management. The PMI is a not-for-profit professional membership association for the project, program, and portfolio management profession.

Project Management Plan (PMP) A comprehensive plan for the execution of the Project; includes multiple sub-plans that address specific project management aspects.

Purchase of Services Purchase of Services is the unit in SSD CWSB that oversees contracts for an array of services that are provided by community agencies for SSD CWSB clients.

Q

Quality Assurance (QA) This is a process-centered approach to ensuring that the organization is providing the best possible products or services.

R

Remote Access (RA) The ability to access a computer or network from a remote distance or location.

Response Bidder's response to the IFB dated January 10,2024. Also referred to as the Bid in the Contract, including the IFB.

Responsible Bidder A responsible bidder is one who submits a responsible bid when the procurement officer makes the determination that the prospective bidder can perform the work called for in the solicitation based on available information. See HAR §3-122-33.

S

Scope of Work (SOW) The scope of the products and services requested through this procurement as outlined in the IFB.

Service-Level Agreement (SLA): The standards to which the System and other Services provided by Contractor shall perform as required by this Contract and any succeeding amendments thereto, as described in the IFB and as otherwise agreed to by the parties in writing. Also referred to as Service Level Requirements, Key Performance Indicators, SLAs, and Service Level Agreements in the IFB and Performance Standards in the Contract.

Service-Oriented Architecture (SOA) is a design paradigm and discipline that helps IT meet business demands. Some organizations realize significant benefits using SOA including faster time to market, lower costs, better Software application consistency, and increased agility. SOA reduces redundancy and increases usability, maintainability, and value. This produces interoperable, modular systems that are easier to use and maintain. SOA creates simpler and faster systems that increase agility and reduce total cost of ownership.

Service Provider Service Provider is any third-party service provider, program or entity who may provide services directly to a client.

Social Services Division (SSD) The State of Hawaii, Department of Human Services, consists of Child Welfare Services Branch and Adult Protective Community Services Branch. SSD provides protection from abuse and neglect for children and dependent adults. Our programs also provide safe living arrangements with the goal of reducing abuse, neglect, and maltreatment.

Software The application software for the System, as described in the IFB, Response, the other parts of this Contract, and Change Orders; Custom Software; Functions; the Releases; the Configuration; all Enhancements thereto; Third-Party Software; and the Contractor Technology, all of the above in Source Code and Object Code formats. Software includes all prior, current, and future versions of the Software and all Deficiency corrections. Embedded code, firmware, internal code, microcode, and any other term referring to software that is residing in the Equipment or that is necessary for the proper operation of the Equipment is not included in this definition of Software.

Software and ownership rights (45 CFR § 95.617) (a) *General.* The State or local government shall include a clause in all procurement instruments that provides that the State or local government shall have all ownership rights in software or modifications thereof and associated documentation designed, developed or installed with Federal financial participation under this subpart.

(b) *Federal license.* The Department reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use and to authorize others to use for Federal Government purposes, such software, modifications, and documentation.

(c) *Proprietary software.* Proprietary operating/vendor software packages which are provided at established catalog or market prices and sold or leased to the general public shall not be subject to the ownership provisions in paragraphs (a) and (b) of this section. FFP is not available for proprietary applications software developed specifically for the public assistance programs covered under this subpart.

State of Hawaii (State) The State in which the issuing entity of this IFB, DHS, is located.

State of Hawaii Automated Keiki Assistance (SHAKA) The secondary legacy system for CWSB, SHAKA is a web-based solution, developed and maintained by Maui Community College, that is primarily used as an internet portal for adopted children to request higher education payments (via SHAKA TOWN).

State Procurement Office (SPO) The State Procurement Office for the State of Hawaii is made up of four segments: administration, procurement, inventory management and surplus property management.

Subject Matter Expert (SME) An expert in a specific subject area.

Supplemental Nutrition Assistance Program (SNAP) The SNAP program provides crucial food and nutritional support to qualifying low-income and needy households, and those making the transition from welfare to self-sufficiency. In FY 2012, SNAP helped put food on the table for an estimated 90,534 Hawaii families each month. SNAP clients access their benefits with an EBT card, which they use like a debit card. The Supplemental Nutrition Assistance Program (SNAP) is a federal program funded through the U.S. Department of Agriculture (USDA). It is administered at the federal level through its Food and Nutrition Service (FNS). State agencies administer the program at State and local levels, including determination of eligibility and monthly allotments.

I

U

Usability³- Usability refers to the quality of a user's experience when interacting with products or systems, including websites, software, devices, or Software applications. Usability is about effectiveness, efficiency, and the overall satisfaction of the user.

It is important to realize that usability is not a single, one-dimensional property of a product, system, or user interface. 'Usability' is a combination of factors including:

- 1) **Intuitive design:** A nearly effortless understanding of the architecture and navigation of the site.

³ From Usability Evaluation Basics, on <https://www.usability.gov/what-and-why/usability-evaluation.html>

- 2) **Ease of learning:** How fast a user who has never seen the user interface before may accomplish basic tasks.
- 3) **Efficiency of use:** How fast an experienced user may accomplish tasks.
- 4) **Memorability:** After visiting the site, if a user may remember enough to use it effectively in future visits.
- 5) **Error frequency and severity:** How often users make errors while using the system, how serious the errors are, and how users recover from the errors.
- 6) **Subjective satisfaction:** If the user likes using the system.

V

Vendor Party responsible for all Services pursuant to a Contract, including the Vendor's owners, members, officers, directors, partners, employees, agents, representatives, and subcontractors.

Voluntary Case Management (VCM) The goal of VCM is to create a safe and healthy home for children by preserving family strengths and decreasing family stress. Services include: ongoing assessment of family strengths and needs; supportive services; referrals for Ohana Conferencing; service plan development with families; and assistance in finding community resources.

W

Warranty Period(s) The one-year period(s): (i) which begins following Acceptance of each Deliverable and Service, following Go-Live of each Function and Release, and following Go-Live of the System, in whole and in part, including without limitation Functions, Releases, and other Deliverables and Services that previously received Acceptance and that are integrated into the System; and (ii) during which Contractor shall provide Warranty Services at no cost.

Work Breakdown Structure (WBS) A hierarchical and incremental decomposition of the project into releases, deliverables, and work packages.

Work Plan The overall plan of activities for the delivery of Services and Deliverables, the delineation of tasks, activities, and events to be performed, and Deliverables to be produced with regard thereto, as provided in accordance with this Contract. Also referred to as the Project Plan in the IFB.

X

Y

Z

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