

Request for Information
Soldiers, Sailors and Marine Fund Client Management System
RFI# 08ITZ0020

State of Connecticut
Department of Information Technology

Request for Information

For

Soldiers Sailor and Marine Fund
Client Management System

RFI# 08ITZ0020

Issue Date:
March 3, 2008

Question Deadline Date:
March 24, 2008 @3:00 PM EST

Due Date:
April 24, 2008 3:00 PM EST

Issued by:
Department of Information Technology on behalf of Soldiers Sailor and Marine Fund

OVERVIEW

The Connecticut Department of Information Technology is seeking information from vendors regarding a configurable Client Management product. The objective is to determine if there are software products available that can automate the Back Office business functions of Client Management, Accounting (including Income, Expense, Check Generation, and Disbursement), Reporting (Static and Ad-Hoc) for the State of Connecticut Soldier, Sailors and Marine Fund (SSMF). Currently the Clients are managed through the Home Office and 5 District Offices.

This Request for Information (RFI) outlines the type of information being solicited from vendors and includes guidelines for content and format of responses. The Vendor(s) will have 3 weeks from issuance date (**March 3, 2008**) to respond with questions. ALL QUESTIONS will be addressed

vernon.derbabian@po.state.ct.us No later than close of business **March 24, 2008 3:00 PM EST**

Written responses must be received no later than **April 24, 2008 3:00 PM EST**. Responses may be mailed to:

State of Connecticut
Department of Information Technology
ATTN: Vernon Lee Derbabian
101 East River Drive 5066
East Hartford, CT 06108

STATEMENT OF PURPOSE

The purpose of this RFI is to gather company and product information from vendors of scalable Client Management systems. Information being sought includes product functionality, technology platform(s) and other specifics including ease of maintenance and enhancements.

For purposes of this RFI "Client Management System" shall be determined to mean "containing modules specific to a business function that can be modified by an end-user, or a developer, using a natural, common language interface to accommodate the various business processes and regulations that differentiate the categories of SSMF Clients. "modified" may be interpreted as provision for modifying existing control, logic and/or database schema; provision for creating new controls, logic, database schema that can interface with provided controls, logic or schema; interface through web services with other products that will enhance functionality.

BACKGROUND

The Soldiers, Sailors and Marine Fund Administrator receive funding (interest income for a Trust) from the State Treasurers Office. The funds are used to provide temporary relief to qualified, honorably discharged service men and woman from all wars (past and present), who have fallen on hard times. Examples of relief are paying a months rent, paying a utility bill or provide funding for food. The aforementioned agency ability to pay is based on the funding source and has the right to refuse assistance to individuals who do not meet the requirements to qualify for assistance. The agency also provides numerous reports to the State Legislature, Towns and Counties as well as keeping track of income, disbursements, client tracking and historical backup. The aforementioned system would be classified as a Back-Office system. However, the proposed system should be scalable to allow a web interface in the future.

RESPONSE CONTENT

Each respondent is being asked to provide the following information (1 original and 5 copies of response):

Company

The Department/Agency is seeking organization and client profile information which may include their resellers or implementation partners (if applicable). This information will be used to gain a better understanding of the nature and capability of each respondent including their experience.

General Product Information

Generally, the Department/Agency is looking for clear statements about product functionality and features. To help the Department/Agency quickly identify and compare features, it is asking respondents to group functionality by category names when possible. This includes additional screen definition, data requirements and flexible reporting of information. The product should allow for Department/Agency data entry and reporting, scheduling, and the ability to do all accounting and Check issuance functions for Clients as well as allowing the scalability to do data transfer to the statewide accounting system PeopleSoft (XML file transfer) in the future.

Business Modules

Client Management

- Request for services from SSMF, Self Service Request/Response (WEB, Email, Mail, Phone, FAX) scalable
- Client Demographic Master File
- Activity Management for Clients
- Request for services Management System
- Ad-hoc Reporting
- Static Reporting
- Case Management Database
- Revocation & Reinstatement Actions of Clients
- Check Issuance, Processing and Control
- Historical Archiving of inactive Clients

Information Reporting and Back Office Support

- Accounting - a module for recording monetary transactions related to a Client and the respective account(s) to which said fees are posted. This must include an assessment of the daily, monthly and yearly reports required for accounting purposes.
- Internal Inquiry/Reporting
- Export selected data to other formats such as spreadsheet or text files to be electronically sent to 3rd parties for Freedom of Information purposes.
- Document Management, work flow, supporting document attachment
- Code/Table Maintenance

Help Desk

- vendor sponsored
- Online interactive available to Departmental/Agency Administrative Personnel. Modifiable by Department/Agency and Applications.

CONCLUSION

The SSMF goals are as follows:

- State of the art Client Management System that provides all Back Office Functionality for a small Agency (including Central Office and Regional Office accessibility) and allow for future public facing (WEB) capabilities utilizing the State of Connecticut EWTA standards.
- Development of a user-friendly relational database that a) Client Demographic Master file, Client Requests for services, Generates and Prints legal tender checks, Provides Administrative Database Maintenance tools, User friendly workflow process, Provides auditable accounting functionality into an all encompassing Client Management System; b) interfaces with Microsoft products (excel, word, access); c) generates static and Ad-Hoc reports based on a variety of data sources; d) is capable of interfacing with a enterprise wide financial system; e) search capabilities.

Technology

The technological solution will reside on state premises. The target architecture should be a logical and physical 3 tier – presentation, business and database layers utilizing web services providing for security and scalability; department level .NET framework 2.0, SQL server 2005 solutions. However, all technology submissions will be considered, as the ultimate goal is to accomplish the business objectives. Respondents should provide technology requirements for their product(s) including, if necessary, any special needs for making application modifications or deployment. The Department/Agency requires respondents to clearly state the requirements of each platform. All third party or proprietary hardware or software should be identified with respective version numbers. Browser product and support levels must be identified. For additional information on the State of Connecticut Department of Information Technology Enterprise-wide Technical Architecture requirements example, go to the following website; (<http://www.ct.gov/doit/cwp/view.asp?a=1245&q=253968>).

If services such as application development/maintenance, data file conversion, product installation and training are also available these should be identified. Any and all rates for these services, if not part of the purchase price, should be identified.

Projected Costs

The Department is interested in deployment costs. Therefore, respondents are asked to include the following:

1. Approximate Licensing and Operating costs and/or formula to calculate at list price rates including but limited to: per seat, product licenses, transactions, server architecture, file conversion costs and file size cost. All alternative cost strategies will be accepted.
2. Rough estimate of total deployment costs i.e. people costs, excluding hardware and license costs, based on completed projects of similar size.

PRESENTATIONS

RFI responses will be reviewed by the Department's staff. Respondents providing clear, concise information may be invited to make oral presentations and product demonstrations to staff members. The Department will select examples that demonstrate functionality identified as being critical or important.

Only a limited number of firms will be invited to make presentations. Those firms not invited to participate in the RFI presentations will still have an equal opportunity to compete in the future RFP. It is possible that some respondents will not be invited due to logistical and time constraints. All onsite presentations will occur on State of Conn. premises.

DISCLAIMERS

The Department is asking for responses to this RFI for informational purposes only and will not be obligated in any way to use any of the information received. Vendors responding to this RFI will not be compensated in any way. Also, responding to this RFI will not enhance any vendor's chances of receiving future work from the Department. Similarly, not responding to this RFI will not be a detriment to any vendor when competing for future work.

In addition, the Department will not be providing feedback regarding the quality or suitability of the vendor's solution to any subsequent RFP. The Department may, however, contact individual respondents for clarification of information contained in their response to this RFI. Vendors may refer the Department to jurisdictions with operating model installations or offer product demonstrations, but the state reserves the right to accept or decline any such referrals.

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FREEDOM OF INFORMATION ACT

Due regard will be given for the protection of proprietary information contained in all proposals received; however, vendors should be aware that all materials associated with the procurement are subject to the terms of the Freedom of Information Act (FOIA) and all rules, regulations and interpretations resulting therefrom. It will not be sufficient for vendors to merely state in general terms that the proposal is proprietary in nature and, therefore, not subject to release to third parties. Any proposal that makes such a general or overarching claim may be subject to disqualification. **Those particular sentences, paragraphs, pages or sections which a vendor believes to be exempt from disclosure under the Act must be specifically identified as such.**

QUESTIONS

Administrative questions should be directed to: vernon.derbabian@po.state.ct.us no later than March 24, 2008
@3:00 PM EST