Appendix B - TECHNICAL PROPOSAL NARRATIVE TEMPLATE

State of Rhode Island
RFP for an Enterprise Content Management System (eCMS)

The technical proposal narrative is limited to fifty (50) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).

Using the following outline, please provide detailed explanations of each section.

(*PLEASE NOTE, the following outline is provided as a convenient reference tool. For detailed requirements of each section, please refer to the master RFP document.*)

4.1 CAPABILITY, CAPACITY, AND QUALIFICATIONS OF THE OFFEROR

1. **Vendor Profile and Demographics**
2. **Financial Information**
3. **Product and Service History**
4. **References**
5. **Staff Qualifications**
6. **Roles**

4.2 WORK PLAN AND PROPOSED APPROACH

1. **Description of Solution**
   Based on the request for information contained in this document, please provide a general description of your proposed solution for ETSS's requirements. Please itemize and describe all hardware, software and service components required.
2. **Product Delivery Model**
   Vendors should describe the delivery model on which they base their solution proposal, together with the advantage they see such a delivery model offers ETSS, given its goals.
3. **Product Capabilities and Functions**
   In addition to the requirements stated within the eCMS RFP, please detail any other product capabilities and functions that may be of interest to ETSS. Ensure these are linked clearly to the high-level goals of the project and describe their role in helping to achieve these goals.

4. **Product Support and Service Warranty**
   Vendors should describe the support offerings available for their applications and associated products. In addition, vendors should provide a copy and description of all warranties associated with the proposed application.

5. **Ability to Meet All ETSS's Security Requirements**
   Vendor should describe its ability to support ETSS's current security requirements (Outlined in Section 3.6) and complete ***Appendix E: eCMS RFP Security Questionnaire*** *(Appendix-E-eCMS-RFP-Security-Questionnaire-PRC-1709002.xlsx).*

6. **Detailed Work Plan**
   Describe in detail the framework within which requested services will be performed. This may come in the form of a sample project plan, including the timeline with duration of each phase, sequence of the project, deliverables and milestones. ETSS will assign a Project Manager to work with the vendor's Project Manager. The vendor must assign an experienced Vendor Project Manager(s) (VPM), who will be responsible for the detailed requirements, configuration, customization, testing, training, and go live of the system (for all modules chosen for implementation).

7. **Approach/Methodology**
   Vendor must describe in detail how comprehensive processes, tools and techniques are applied to the lifecycles of the project (i.e. initiation, planning, execution, control and closing). Specifically, please illustrate the following:
   - ***a.*** *Approach to Methodology (Agile / Waterfall) Framework*
   - ***b.*** *Approach to integrating with existing external systems.*
   - ***c.*** *Approach for migrating data in a cloud-based environment.*
   - ***d.*** *Approach to Release and Change Management.*
   - ***e.*** *Approach to Approach to training and deployment.*
   - ***f.*** *Approach to iterative development and support.*

8. **Cloud/SaaS Deployment Options**
   There are many deployment models for cloud computing. Public cloud eCMS solutions are run in the provider's data center, and a core feature is that they are run in a multitenancy environment. Private cloud eCMS solutions are deployed either in a corporate data center using virtualization and shared-service approaches, or in a dedicated environment using a hosting partner. Vendors should describe their experience in implementing their software in cloud environments and/or provide details of any offerings from application service providers or other SaaS vendors.

   In addition, the vendor should explain (in detail) any cloud service agreement (CSA)/service level agreement (SLA) expectations of security control performance, describe measurable outcomes, and identify remedies and response requirements for identified instances of noncompliance.

9. **Development and Maintenance Service Level Agreements (SLA)**
In order to ensure the sustainability and success of the Rhode Island eCMS, vendors must recommend development and maintenance Service Level Agreements (SLA) with a focus on performance measuring and service quality.

Specifically, the vendor should describe how their development and maintenance SLAs will formalize:

a. *Specific details of services provided*
b. *Change Management*
c. *Conditions of service availability*
d. *Calculations of eCMS availability or uptime*
e. *Standards such as vendor response time for each level of service*
f. *Responsibilities of Vendor and ETSS*
g. *Escalation procedures*
h. *Penalties for SLA breach*
i. *Reporting process and frequency*
j. *Dispute resolution protocols*

10. **Product Upgrades and New Version Releases**
Vendors should describe:

a. *The process of new version releases and the application of service packs to the software product(s).*

b. *The quality assurance/testing processes to follow in order to determine whether an upgrade or custom modification is suitable for release.*

c. *The process by which opportunities for system enhancements are identified, screened, programmed, field-tested and released to customers.*

d. *Whether the upgrade methodology includes a tracking system not only to report on the status of the upgrade, but also to record problems and bugs.*

11. **User Needs Analysis, Assessment, and Testing**
The high-level business objectives of Section 3: Scope of Work and Requirements reflect the goals of the overall program of work planned by ETSS. The cornerstone of this initiative is the focus on 'Citizen-Centered Design'. Citizen-Centered Design is the process of improving the usability, accessibility, and accountability of a government's digital service for the benefit of enhancing a citizen's interaction with the service.

To address this goal, the project should be based on repeatable, iterative user research testing processes created by the selected Vendor. Vendors should describe these processes in detail, including personnel training in user

research, tools used during these processes, and typical artifacts that result from this research.

12. Training

Vendors should describe what training of ETSS staff is required or recommended to support the implementation of products and services. In addition, the Vendor should describe the vision for providing training materials and how said materials shall be updated with future eCMS updates.

13. Skill Set Requirements of Personnel

Vendors should describe the skills and likely full-time equivalents (FTEs) needed to implement and support their application product(s) as outlined in this proposal. A sample or representative RASCI model is also desirable.

14. General Comments

Vendors should include any additional information that they consider would help ETSS evaluate their submission. The State has offered its vision and a description of where it stands today within the master eCMS RFP. We'd like the Offeror to share their vision, as well.