NCCSD Systems Modernization Committee
Systems Modernization States Lessons Learned Webinars

Procurement – 10/15/2021

Indiana

Dawn McNeal – dawn.mcneal@dcs.in.gov

Indiana – INvest Project

- IV-D Caseload – 230K+, State administered/County operated

- Infrastructure – Managed by Indiana Office of Technology (IOT)
- Applications – Managed by Agency – Dept of Child Services (DCS), CIO directed move to COTS (Salesforce)
- Project – managed by DCS IT Team with some dedicated Child Support Bureau (CSB) staff
- Agency requested an agile approach in RFP – Scrum was proposed in winning bid

- Vendors:
  - Design, Development, Implementation (DDI) – Deloitte
  - Project Mgmt. Office (PMO) – netlogx
  - Quality Assurance (QA) – CSG
  - IVV – KPMG

- Timeline: June 2020 start – November 2022 Statewide Implementation

Procurement

IN Procurement approach for each vendor:

- DCS wrote Procurement Plan and shared with OCSE
- 3 of 4 RFP through IDOA, IVV through Managed Service Provider

Order of onboard:

- QA – proactive, governance (PM/SDLC), monthly QA report
- PMO – decided to outsource, cost/schedule/quality, traceability, risks and issues, change control, project metrics
- DDI – required Salesforce, asked for agile, required ALM tool
- IV&V – reactive, OCSE semi-annual, IOT required monthly reports

Procurement

IN Procurement Plan - Responses, Proposals & BAFO:

- DCS wrote all four vendor procurement documents based on needs and pre-procurement discussions with other states, vendors, software companies
- Resources - IDOA/Ikaso facilitated procurement discussions, State and County staff on procurement both as advisors and evaluators
- Procurement Rules – IDOA/Ikaso ensured rule adherence, 50 points for mgmt. assessment and 25 points for cost
- All procurements had between 3-6 proposals, Orals, BAFO

- Lessons – have PM review schedule and share feedback, in orals have them show system/framework, get clear picture of agile process

Procurement

IN Procurement Contract Development:

- Contracts – Ikaso helped facilitate DDI/PMO contract discussions, averaged about 4 - 6 months to finalize
- Contract Management – Directors manage contracts but have backup, have weekly mtgs, address issues, sign invoices, amendments, most weekly mtgs include vendor sponsor

- Lessons – get majority of software decisions clear prior to contract finalization, understand where your agency will do some work and plan for that work

Procurement

OCSE Approval of RFPs, Contracts:

- Strategy – Ensure using federal key clauses, had OCSE provide letter for IDOA to remove geographical preference
- Meetings – Communication key, provided status updates, follow up
- Timeline – provided a high-level graphic of RFP/Contract estimates, as get closer communicate your start date