



Interoffice Memorandum

SEE MINUTES
FOR MOTION

BCC Mtg. Date: March 15, 2016

March 15, 2016

TO: Mayor Teresa Jacobs
and the Board of County Commissioners

FROM: *WJ* Johnny Richardson, Manager, Procurement Division

CONTACT: Blain Mustain, Senior Monitoring & Evaluation Coordinator
Health Services Department
407-836-8994

SUBJECT: Selection of Consultant for Request for Proposals Y15-143-ZM Centralized
Community Resource/Case Management Software Application

RECOMMENDATION:

Selection of one firm to provide Centralized Community Resource/Case Management Software Application, Request for Proposals Y15-143-ZM, from the following firms listed alphabetically:

Cocentrix, Inc.
Social Solutions
Spirit, Inc.

Request authority for the Procurement Division to negotiate and execute a 5-year contract within a budget of \$398,925.

This item was evaluated by the Procurement Committee on January 27, 2016. Commissioner Ted Edwards was assigned to the Procurement Committee.

PURPOSE:

This centralized community resource/case management software application is tailored towards youth and families in Orange County. The system will be able to provide real-time detailed information about appropriate and available community resources in order to connect youth and families to community service providers. Participating service providers will have the ability to enter client information into the database and establish an individualized care plan based on client needs. The system will track client demographics, insurance information, and client scheduling.

FUNDING:

Funding is available in account 0001-060-2504-3192.

REMARKS:

This software system is a new implementation, the intent is to utilize a centralized Community Resource/Case Management Database software to increase the connectivity between community providers and youth and families in need, increasing the effectiveness and proper use of community resources.

A three-phase evaluation process was conducted. Proposers had to successfully complete Phase 1 and 2. Phase 1 of this RFP evaluated written proposals for qualification, technical compliance and methodology with Cocentrix, Inc., Netsmart Technologies, Inc., Social Solutions, Spirit, Inc., and Zeomega, Inc. achieved the minimum score of 105 to advance to Phase 2. Phase 2 evaluated the firm's on-site presentations and technical demonstrations and Cocentrix, Inc., Social Solutions, Spirit, Inc., and Zeomega, Inc. advanced to Phase 3. Phase 3 culminated with an evaluation of the fee proposal and MWBE criteria with Spirit, Inc receiving the highest score followed by Social Solutions and Concentrix. The proposal from Zeomega, Inc was deemed non-responsive because the proposer submitted additional terms and exceptions to their fees. The Procurement Committee evaluated the proposals against the stated criteria. Attached are the consensus scores.

PHASE 3 EVALUATION SCORESHEET

RFP#: #Y15-143-ZM

Centralized Community Resource/Case Management Software Application

	PHASE 1 WRITTEN		PHASE 2 PRESENTATION		PHASE 3							TOTAL
	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	Fee Proposal	Location		M/WBE Utilization		Welfare Hires	Disabled Vet. Hires	
WEIGHT:	35		30		20	5		10		5	15	
FIRM:	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	RAW SCORE	WEIGHTED SCORE	BONUS POINTS	BONUS POINTS	
COCENTRIX, INC.	3.48	121.7	4.39	131.7	52.0	0.0	0.0	3.0	30.0	0.0	0.0	335.4
NETSMART TECHNOLOGIES, INC.	3.61	126.2	4.25	127.5	DECLINED INVITATION TO PHASE 3							
SOCIAL SOLUTIONS	3.62	126.8	3.89	116.7	100.0	3.0	15.0	2.0	20.0	0.0	0.0	378.5
SPERIDIAN TECHNOLOGIES	2.07	72.5	DID NOT ADVANCE TO PHASE 2									
SPIRIT, INC.	4.21	147.2	5.00	150.0	95.0	5.0	25.0	3.0	30.0	0.0	0.0	447.2
ZEOMEGA, INC.	3.35	117.4	4.53	135.8	NON-RESPONSIVE IN PHASE 3							

* Only Proposers whose Phase 1 responses scored 105 or above advanced to Phase 2.


** Only Proposers whose Phase 1 responses and Phase 2 Presentations cumulatively scored 195 or above advanced to Phase 3.



Interoffice Memorandum

December 18, 2015

To: Zulay Millan, Senior Purchasing Agent
Procurement Division

FROM: Kesi Warren, Senior Contract Administrator 
Business Development Division

SUBJ: **RFP #Y15-143-ZM, Centralized Community Resource/Case Management Software Application**

Below are the respondents to the subject RFP with their firm's certified sub-consultants and MWBE participation score on a 1 – 5 rating:

1.	Spirit, Inc.		3 Points
*	None	0%	
	Total MWBE Participation:	0%	
	EEO Staff	75%	
Bonus Points			
*	Service-Disabled Veterans (SDV)	0	
*	Welfare Recipients:	0	

*The Schedule of Sub-Contracting –MWBE & SDV Participation and Welfare Recipient forms were not submitted with this proposal.

2.	Social Solutions		2 Points
*AFAM	AceApplications, LLC	0%	
	Total MWBE Participation:	0%	
*	EEO Staff	0%	
Bonus Points			
*	Service-Disabled Veterans	0	
*	Welfare Recipients:	0	

*The Employment Data, Schedule of Minorities and Women and the Schedule of Sub-Contracting – MWBE & SDV Participation and Welfare Recipient forms were not submitted with this proposal. There was not a percentage of contract amount to be subcontracted to the Minority sub listed in the proposal. Therefore, the evaluator could not assess points for that criteria.

cc: Contract File

Aheena Ferguson

3.	CoCentrix, Inc.		3 Points
*	None	0%	
	Total MWBE Participation:	0%	
	EEO Staff	52%	
Bonus Points			
*	Service-Disabled Veterans	0	
*	Welfare Recipients:	0	

*The Schedule of Sub-Contracting –MWBE & SDV Participation and Welfare Recipient forms were not submitted with this proposal.