

Department of Children and Family Services
Request for Proposal
Federal Revenue Enhancement and Claiming Systems Support Services
PO27-149
26-418DCFS-PROCU-B-53611

Section A. SCOPE OF WORK

A.1. OVERVIEW AND PURPOSE

The Illinois Department of Children and Family Services (DCFS or the Department) is seeking proposals from qualified Offerors to provide federal revenue enhancement services. These services support the Department's claiming of federal financial participation (FFP) under Titles IV-B and IV-E of the Social Security Act, the Temporary Assistance for Needy Families (TANF) program, and the John H. Chafee Foster Care Program for Successful Transition to Adulthood (Chafee).

The Department's purpose in this procurement is to obtain the maximum federal revenue lawfully available to support Illinois child welfare services, claimed accurately, claimed on time, and fully defensible under federal and State audit review. The resulting contract is expected to cover preparation and submission of federal claims and reports, review of Title IV-E eligibility documentation for adoption assistance and guardianship assistance subsidies, support and maintenance of the systems and processes used for federal claiming, cost allocation support, and technical assistance related to claiming, audits, and federal program reviews. Section B of this solicitation describes the Department's current operating environment, systems, and volumes. A Draft Contract, Attachment G.1, describes in detail the work the successful Offeror will be expected to perform under the resulting contract.

DCFS will consider this engagement successful if the resulting contract delivers:

- Federal revenue claimed and retained at the level available under the Department's approved cost allocation and claiming methodologies.
- Federal claims and reports submitted within federal deadlines in every quarterly and annual cycle.
- No interruption to federal claiming, reporting, or audit activity during the transition at the start of the contract term.
- No federal disallowances, deferrals, or audit findings caused by claim preparation or supporting documentation.

A.2. DESIRED OUTCOMES OF THIS PROJECT/ENGAGEMENT

DCFS seeks the following outcomes from the resulting contract. Section B describes the Department's current operating environment, systems, volumes, and challenges. The Draft Contract, Attachment G.1, describes the specific work, deliverables, and service levels the successful Offeror will be expected to perform. Offerors should describe their proposed approach to achieving these outcomes in their technical response, as directed in Section F.3.

- A.2.1. **Complete and timely federal claiming.** DCFS seeks preparation, review, validation, and submission support for all federal claims and reports across its funding streams, including Title IV-E, Title IV-B subparts 1 and 2, TANF Emergency Assistance, Chafee and Education and Training Vouchers, Medicaid administrative claiming, and SSI/SSA trust fund operations under Titles II and XVI of the Social Security Act. The outcome sought is that every quarterly and annual claim and report is complete, accurate, supportable, and filed within federal deadlines.
- A.2.2. **Eligibility review and revenue protection.** DCFS seeks review of all adoption assistance and guardianship assistance (KinGap) subsidies prior to finalization to ensure that eligibility criteria documentation, Adam Walsh Act compliance, background check documentation, and required court documentation support the eligibility determination process. DCFS also seeks ongoing monitoring of claimability across foster care, adoption, and guardianship populations to identify and correct eligibility issues that affect federal revenue. The outcome sought is that federal revenue is protected through accurate, well-documented eligibility support and that deficiencies are identified and resolved before they result in federal findings or disallowances.
- A.2.3. **Identification of allowable but unclaimed revenue.** DCFS seeks ongoing analysis of Department spending, service populations, contracts, and appropriations to identify costs that are allowable under federal requirements but are not currently being claimed. The outcome sought is a recurring, documented analysis that results in measurable additional federal revenue to the State.
- A.2.4. **Cost allocation and indirect cost support.** DCFS seeks assistance maintaining and updating its Public Assistance Cost Allocation Plan (PACAP) and indirect cost rate proposal in response to legislative changes, policy changes, organizational changes, and operational needs. The outcome sought is an approved, current cost allocation plan that supports the Department's claiming methodologies.
- A.2.5. **Revenue protection through audit and review support.** DCFS seeks technical and programmatic support for federal Title IV-E eligibility reviews, the annual statewide single audit, internal mock compliance reviews, and negotiation of actual or proposed federal disallowances. The outcome sought is that federal revenue already claimed is retained, and that findings, deferrals, and disallowances are avoided or successfully resolved.

- A.2.6. **Sustained and improved claiming systems.** DCFS seeks maintenance, enhancement, and continued development of the applications and processes that support federal eligibility and claiming, which operate across integrated legacy mainframe and modern web platforms. The outcome sought is that these systems remain available, accurate, current with State and federal requirements, and capable of supporting claiming through the Department's planned transition to a Comprehensive Child Welfare Information System (CCWIS).
- A.2.7. **Transition without interruption to claiming.** DCFS seeks a structured transition at the start of the contract term that brings the successful Offeror to full operating capability without disrupting active claiming cycles, eligibility determinations, or audit activity. The outcome sought is continuity of federal revenue across the transition period, with historical claiming logic, data, and documentation carried forward intact.
- A.2.8. **Retained institutional knowledge.** DCFS seeks current documentation of claiming methodologies, system processes, and operating procedures, together with training and knowledge transfer to Department staff. The outcome sought is that the Department's ability to claim federal revenue does not depend on any single individual, system, or contractor.

A.3. SCHEDULE

- A.3.1. **Timing needs and constraints.** Federal claiming operates on a fixed quarterly cycle aligned with the federal fiscal year, which runs from October 1 through September 30. Claims and reports are prepared and submitted following the close of each federal fiscal quarter (December 31, March 31, June 30, and September 30), with submission deadlines established by the federal grantor agencies. Eligibility review work is continuous throughout the year. Services under the resulting contract cannot pause. Transition activity at the start of the contract term must be planned around active claiming cycles so that no quarterly claim is late, incomplete, or unsupported.
- A.3.2. DCFS currently receives these services under an existing contract. Continuity of federal claiming, eligibility determination, and audit support is required from the first day of the resulting contract. Offerors should account for this constraint in the transition schedules they propose.
- A.3.3. The Department is engaged in a multi-year transition to a Comprehensive Child Welfare Information System (CCWIS). Existing claiming systems and processes will continue to operate on current platforms while that transition proceeds. The Department will set the schedule for CCWIS related work, and Offerors should not assume a fixed completion date for that transition in their proposed schedules.

- A.3.4. **Estimated procurement timeline.** The following timeline is an estimate provided to assist Offerors in planning resource availability. Dates are subject to change, and any changes will be posted to BidBuy.

Event	Estimated Date
Deadline for Offeror questions	October 19, 2026
Agency responses to questions posted to BidBuy	October 26, 2026
RFP opening, proposals due	November 13, 2026
Technical and Commitment to Diversity evaluation	November 13 through December 01, 2026
Price proposals opened	December 2, 2026
Notice of intent to award posted to the Bulletin	December 18, 2026
Contract execution	February 2 2027
Transition period begins	Upon contract execution

A.4. UNIQUE CONSIDERATIONS

The following conditions distinguish this engagement from comparable work in the vendor community. DCFS provides this information so that all Offerors, including those with no prior relationship with the Department, can assess the environment and propose accordingly.

- A.4.1. **Integrated legacy and modern platforms.** Federal claiming and eligibility functions operate across a mainframe environment and a set of web-based applications that exchange data with it. The mainframe components are long established and support business logic that has been developed over many years. Offerors should expect to work in both environments concurrently and should describe their approach to supporting an integrated legacy and modern platform environment. Section B describes these systems, and Section G provides a list of attachments that describes the supporting work in detail.

- A.4.2. **Incumbent knowledge.** Services of this type have been provided to DCFS under contract for an extended period. The Department recognizes that a contractor currently performing this work holds operational familiarity that other Offerors will not have at the time of proposal. DCFS has taken the following steps so that Offerors are evaluated on capability rather than on prior access: the Draft Contract, Attachment G.1, describes the work in detail; Section B describes the current operating environment and systems; and the question period identified in Section C is available for Offerors to request clarification. Evidence submitted in response to Section F.2 may be drawn from comparable engagements and is not required to be specific to Illinois or to DCFS systems. Procedure manual tables of contents are provided as exhibits in Section G to further assist Offerors in understanding the Department's current operations.

- A.4.3. **Ownership of documentation and work product.** All work product, documentation, manuals, and operating procedures developed under the current and resulting contracts are the property of the Department. Documentation of claiming methodologies, system processes, and unit procedures is maintained and will be made available to the successful Offeror during transition.
- A.4.4. **Claim processing application.** The application currently used to prepare and process federal claim submissions is owned by the incumbent contractor and is not the property of the Department. DCFS does not require any particular technical solution. Offerors may propose a proprietary application, a commercially available product, a custom developed solution, or another approach that meets the Department's claiming requirements, please see the Draft Contract (Attachment G.1.) for additional detail Offerors should describe the solution they propose, how the Department's data will be maintained and accessed, and what rights the Department will hold in that solution and in the data it contains.
- A.4.5. **Concurrent CCWIS transition.** DCFS is engaged in a multi-year transition to a Comprehensive Child Welfare Information System. Federal claiming components are expected to be addressed in later phases of that effort, and the schedule is subject to change. Existing systems will continue to operate and must continue to support claiming throughout. Offerors should not assume a fixed completion date for the CCWIS transition and should describe how they would maintain current systems while supporting planning for the future environment.
- A.4.6. **Dependencies on other State agencies.** Federal claiming for DCFS populations depends on systems, data, and schedules controlled by other State agencies, including the Department of Healthcare and Family Services, the Department of Human Services, and the Department of Innovation and Technology. Interagency data exchanges are governed by intergovernmental agreements to which DCFS is a party. Schedules for changes to those systems are set by the owning agency. Offerors should describe their experience coordinating work across agency boundaries where the system of record is owned by another entity.
- A.4.7. **Access, security, and onboarding conditions.** Certain functions require specialized access that is granted only after Department training and background screening, including access to court order data and to case management systems containing confidential child welfare records. Access to some county court systems is separately restricted. Offerors should account for onboarding time associated with these conditions in the transition schedules they propose.
- A.4.8. **Audit exposure spans contract periods.** Federal claims remain subject to review, audit, deferral, and disallowance for periods after they are submitted. The successful Offeror should expect to support Department responses to reviews and

audits covering claiming periods that precede the contract term, based on Department records and documentation.

- A.4.9. **Conditions assumed.** DCFS has no active Title IV-E waivers at the time of this solicitation. County participation in Title IV-E legal cost claiming is expanding, and the number of participating counties during the contract term is not fixed.

A.5. TERM

- A.5.1. **TERM OF THIS CONTRACT:** The contract resulting from this procurement will have an initial term of ten (10) years, commencing upon the last dated signature of the Parties. In no event will the total term of the contract, including the initial term, any renewal terms, and any extensions, exceed ten (10) years. Vendor shall not commence billable work in furtherance of the contract prior to final execution of the contract except when permitted pursuant to 30 ILCS 500/20-80.

Section B. CURRENT CONDITIONS

B.1. OVERVIEW & BACKGROUND

B.1.1. **The Revenue Enhancement Program.** DCFS operates a federal revenue enhancement program through its Office of Federal Financial Participation (FFP), housed within the Office of Budget and Finance. The program is responsible for claiming and protecting federal reimbursement across the Department's child welfare funding streams and for maintaining the systems and processes that support that work.

B.1.2. **Organizational structure.** FFP operations are organized into functional units including the Eligibility Determination Unit (EDU), the Technical Support Unit (TSU), and the Children's Accounts Unit, each supported by a combination of Department staff and contractor personnel working in an integrated model. Contractor staff report through the contractor's management structure but work on site alongside Department staff and perform functions that are operationally embedded in the Department's daily workflow.

B.1.3. **Funding streams.** The Department claims federal financial participation under the following programs:

- Title IV-E of the Social Security Act. Foster care maintenance, adoption assistance, guardianship assistance (KinGap), Chafee Foster Care Program for Successful Transition to Adulthood, and Education and Training Vouchers. Title IV-E is the Department's largest source of federal reimbursement.
- Title IV-B of the Social Security Act. Child welfare services (Subpart 1) and Promoting Safe and Stable Families (Subpart 2).
- Temporary Assistance for Needy Families (TANF). Emergency Assistance claiming based on Maintenance of Effort documentation derived from the former AFDC Emergency Assistance program.
- Title XIX (Medicaid). Administrative claiming for allowable activities and a Medicaid billing operation supporting Rule 132 mental health services provided to children in care.
- Title II and Title XVI of the Social Security Act. SSA and SSI trust fund operations for children in DCFS care.

B.1.4. **Scale.** The Department's federal claiming volume is substantial. Historical claiming and volume information is provided in Section B.2 to assist Offerors in understanding the scale of the engagement.

- B.1.5. **Systems supporting eligibility and claiming.** Federal eligibility determination and claiming are supported by an integrated set of applications operating across a legacy mainframe environment and modern web-based platforms. These systems exchange data with each other and with systems owned by other State agencies. The Department's claiming operations depend on these systems operating continuously and accurately.

The following describes the major systems and platforms currently in use.

- B.1.5.1. **MARS FFP applications.** The Title IV-E MARS FFP applications reside within a host-based IMS DB2 system that is a subset of the overall Child and Youth Centered Information System (CYCIS). These applications support eligibility determination for Title IV-E, Medicaid, and TANF Emergency Assistance; adoption assistance and guardianship assistance processing; SSI/SSA trust fund operations; court order review; family income information; and sub-recipient reporting. The system includes online screens and batch programs. The MARS FFP environment also includes batch processing and reporting programs supporting the Eligibility Determination Unit, including Streamline monitoring and Auto-Coding functionality for initial eligibility processing. Auto-Coding is a multi-platform process that uses Standard Narrative output to drive automated initial eligibility coding on the mainframe. Streamline is an ongoing monitoring process that tracks licensing and placement information across a two-year claiming eligibility window to identify eligibility changes requiring action.
- B.1.5.2. **Emergency Assistance System.** The Emergency Assistance system calculates the maximized claimable amount under the federal Title IV-A Emergency Assistance block grant allocation program. The system is fed by eligibility data from the Case Management and Client Registration systems and by payment data from the financial systems through the Federal Claiming System. The system is comprised of batch programs and DB2 tables.
- B.1.5.3. **Revenue Maximization application (RevMax).** RevMax is a web-based application using a SQL Server database that supports federal claims preparation. The system processes the task items required to complete federal claims including Title IV-E, IV-B, and Emergency Assistance/TANF. The application also supports Federal Funding Accountability and Transparency Act reporting, sub-recipient reporting, and audit support functions.
- B.1.5.4. **Standard Narrative System.** The Standard Narrative System is a web-based application that captures information for each Title IV-E requirement and supports accurate eligibility determination. The

system contains embedded validations and acceptance criteria, imports case data from Court Tracking for pre-population of judicial findings and demographics, tracks staff assignments and work production, and provides a nightly interface file for mainframe Auto-Coding processing. The application is built on Microsoft .NET Core, Angular, and C# with a SQL Server database and is maintained on the DCFS production server.

- B.1.5.5. **Claim processing application (CARS).** The application currently used to prepare and process federal claim submissions for Title IV-E reimbursement is owned and operated by the current contractor. It is not the property of the Department. The Department's data processed through this application is the property of the Department. Additional information regarding this application and the Department's expectations for claim processing under the resulting contract is provided in Section A.4.4 and in the Draft Contract (Attachment G.1.).
- B.1.5.6. **Medical Assistance System.** This IMS/DB2 system tracks the issuance of temporary medical cards to children in the Department's care and the distribution of physical medical cards from central office to field locations. The system interfaces with the Department of Healthcare and Family Services (HFS) to receive new card numbers and validate the card issuance process.
- B.1.5.7. **Managed Care Support (Youthcare).** In 2019 DCFS transitioned its youth in care and former youth in care populations into the HFS Managed Care system. The Department produces and distributes Daily Notification File (DNF) data and maintains data exchanges with HFS, DHS, and other managed care partners. This includes daily processing and support of ongoing data exchange, processing, and reporting functions. A managed care interface flow chart is provided as Attachment G.3.
- B.1.5.8. **Home of Relative (HMR) System.** The HMR application resides in an IBM/DB2 environment and supports batch processing and reporting for home-of-relative and unrelated/unlicensed placements. The system assists in monitoring placement and payment status and retrieves data from Provider, Case Management, Case Manager, Client Registration, and Trust systems.
- B.1.5.9. **Trust System.** The Trust system is an accounting system for SSI and SSA funds received on behalf of children in DCFS care. The system establishes trust fund encumbrances, tracks reimbursement amounts due to the Department and produces management reports. The system interacts with banking partners for positive pay processing and debit/credit reconciliation.

B.1.5.10. **Subsidy Tracking System.** The Subsidy Tracking system stores pending case information for prospective adoption and guardianship subsidies and supports case monitoring and management by adoption specialists. The CWCA Tracking System is a related application provides CWCA partner agencies with visibility into the status of subsidy packets during the adoption and guardianship process.

B.1.6. **Platform environment.** The legacy mainframe applications listed above operate in an IMS DB/DC and DB2 environment on the State's IBM mainframe, which is managed by the Department of Innovation and Technology (DoIT). Batch job scheduling, production control, and mainframe infrastructure are DoIT responsibilities. Web based applications operate on Microsoft platforms using .NET, SQL Server, and related technologies. Both environments are in active use and will remain so for the foreseeable future.

Development and maintenance of the mainframe applications requires skills in COBOL (IMS DB/DC and DB2), Eztrieve Plus, and MVS JCL. Web application work requires skills in the Microsoft .NET stack including C#, ASP.NET, and SQL Server. Offerors should account for both environments in their proposed staffing.

B.1.7. **Interagency dependencies.** Federal claiming for DCFS populations depends on systems, data, and schedules that are owned or controlled by other State agencies. Key dependencies include:

- Department of Healthcare and Family Services (HFS). Medicaid eligibility data through the Integrated Eligibility System (IES), medical card processing, and Medicaid claims adjudication.
- Department of Human Services (DHS). TANF eligibility data and emergency assistance populations; shared use of PACIS (Public Assistance Client Information System).
- Department of Innovation and Technology (DoIT). Mainframe infrastructure, batch scheduling, production control, network access, and security. Production control has been transitioned to DoIT. The contractor delivers production jobs in drop folders for DoIT execution and provides ongoing coordination and troubleshooting support when production issues arise.
- County court systems. Court order data required for Title IV-E eligibility determination. Access to county court systems varies by jurisdiction and is separately restricted.

B.1.8. **CCWIS transition.** The Department is engaged in a multi-year transition to a Comprehensive Child Welfare Information System (CCWIS), referred to internally as Illinois Connect. Federal claiming and eligibility components are expected to be addressed in later phases of this effort. The existing systems described above will

continue to operate and must continue to support claiming until CCWIS components are ready to assume those functions. Offerors should not assume a fixed completion date for the CCWIS transition.

B.1.9. Operational documentation. The Department maintains operational procedure manuals for the major functional units involved in eligibility determination and claiming. These include the Eligibility Determination Unit Manual (revised February 2026) and the Technical Support Unit Manual (revised September 2025), among others. These manuals describe in detail the processes, system navigation, eligibility criteria, forms, and reference tables used in daily operations. Tables of contents for the Children’s Accounts Unit Procedures Manual, the Eligibility Determination Unit Manual, and the Technical Support Unit Manual are provided as Attachments G.4., G.5., and G.6. Complete manuals will be made available to the successful Offeror during the transition period.

B.2. VOLUMES & QUANTITIES

The following information is provided so that Offerors can understand the scale of the engagement and develop appropriately sized proposals. All figures are historical unless otherwise noted and are provided for informational purposes only. They do not represent a guarantee of future volume. Actual volumes may change during the contract term due to caseload fluctuations, policy changes, or operational initiatives.

B.2.1. Federal claiming.

Activity	Historical Annual Volume
Title IV-E foster care, adoption assistance, guardianship assistance, Chafee, and ETV reimbursement	\$399.8M in annual claiming
TANF Emergency Assistance Maintenance of Effort documentation	\$269M annually
Medicaid administrative claiming and Title XIX billing	~\$19.6M maintenance, ~\$6.5M administrative

B.2.2. Eligibility determination and review.

Activity	Historical Annual Volume
Adoption assistance eligibility reviews	2,000 – 2,500
Guardianship assistance (KinGap) eligibility reviews	600-1,000
Youth in foster care	16,000
Active youth in Adoption/Guardianship	27,000

B.2.3. Systems

Category	Approximate Scope
Mainframe applications maintained (COBOL, Eztrieve Plus, IMS DB2)	Multiple applications across eligibility, claiming, trust, medical assistance, HMR, and court tracking functions
Web applications maintained (.NET, SQL Server)	RevMax, Standard Narrative, Court Tracking, Subsidy Tracking, CWCA Tracking, and related tools
Interagency data exchanges	Recurring exchanges with HFS, DHS, DoIT, and county court systems

B.2.4. **Staffing context.**

Category	Historical Level
Contractor staff supporting FFP operations	10
Contractor IT staff supporting FFP operations	8

B.3. AREAS OF CONCERN/CHALLENGES

The following conditions represent known challenges in the Department's current operating environment. DCFS provides this information so that Offerors can address these areas in their proposals. These challenges may inform the Department's evaluation of proposed approaches under Section F.3.

B.3.1. Transition risk. Federal claiming operates on a fixed quarterly cycle and cannot be interrupted. A transition that delays or disrupts a quarterly claim submission, an eligibility review cycle, or an active audit response would directly reduce federal revenue to the State. The Department's primary concern in this procurement is that the transition from the current contract to the resulting contract preserves continuity of every claiming and reporting function from the first day of performance. Offerors should describe how they would manage this risk.

B.3.2. Contractor-owned claiming application. The application currently used to prepare and process Title IV-E federal claim submissions is owned by the current contractor and is not the property of the Department. Any transition to a new contractor requires either continued access to and use of that application under a separate arrangement, migration to a different solution, or parallel operation during a changeover period. The Department's expectations regarding claiming solutions are described in Section A.4.4. Offerors should describe their proposed approach to claim processing and address how claiming continuity would be maintained if their solution differs from the one currently in use.

B.3.3. Legacy platform workforce. The mainframe applications supporting eligibility and claiming require development and maintenance skills in COBOL, Eztrieve Plus, and MVS JCL. The pool of professionals with current experience in these technologies is shrinking nationally. The Department recognizes this constraint and

expects Offerors to describe how they would recruit, retain, and develop staff with these skills for the duration of the contract term.

- B.3.4. **Institutional knowledge concentration.** Services of this type have been provided under contract for an extended period by the same contractor organization. Operational knowledge of the Department's claiming methodologies, eligibility practices, system logic, and interagency relationships is concentrated in a small number of individuals. The Department maintains procedure manuals to mitigate this risk, but Offerors should describe how they would build and sustain institutional knowledge within their own organization so that the Department's claiming capability does not depend on any single person or team.
- B.3.5. **Interagency coordination.** Several claiming and eligibility functions depend on data, systems, and schedules controlled by other State agencies. The Department does not control the timing of changes to those external systems. When HFS, DHS, or DoIT makes changes to systems that feed DCFS eligibility or claiming processes, the contractor must adapt quickly and often without advance notice. Offerors should describe their experience working in environments where critical dependencies are owned by entities outside the contracting relationship.
- B.3.6. **Evolving federal requirements.** Federal child welfare policy, regulations, and audit standards change during the life of any multi-year contract. Recent and anticipated areas of change include the transition to CCWIS, revisions to the Title IV-E eligibility review process, changes to Medicaid managed care affecting children in care, and ongoing implementation of the Family First Prevention Services Act. The Department expects the successful Offeror to monitor, analyze, and advise on the impact of federal changes and to implement necessary modifications to claiming and eligibility processes in a timely manner.
- B.3.7. **Data integrity across systems.** Eligibility determination and claiming accuracy depend on the quality of data across multiple systems that were built at different times on different platforms. Inconsistencies between case management data, eligibility records, payment data, and court order documentation are a recurring source of errors identified in quality review and federal audit. Offerors should describe their approach to identifying and resolving data quality issues that affect claiming accuracy.

B.4. FIGURES, DIAGRAMS, & REFERENCE DOCUMENTS

The following documents are provided as attachments in Section G to assist Offerors in understanding the Department's current operating environment. These materials are Department property and are provided for informational purposes to support proposal development.

- B.4.1. **Draft Contract.** The Draft Contract (Attachment G.1.) describes the specific tasks, deliverables, service levels, and staffing requirements the successful Offeror will be expected to perform under the resulting contract. This document will become part of the executed contract.

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- B.4.2. **Managed Care Interface Flow Chart.** A flow chart describing the data exchanges between the Department and HFS, DHS, and managed care entities supporting youth in care (Attachment G.3.)
- B.4.3. **Children's Account Section Procedures – Table of Contents.** Table of contents from the Children's Accounts Unit Procedures Manual describing the operational procedures for managing trust accounts for children in the Department's care (Attachment G.4.)
- B.4.4. **Procedure manual tables of contents.** Tables of contents from the Eligibility Determination Unit Manual (revised February 2026, Attachment G.5.) and the Technical Support Unit Manual (revised September 2025, Attachment G.6.). Complete manuals will be made available to the successful Offeror during the transition period.

Section C. PROPOSAL REQUIREMENTS

Only Electronic Submissions through BidBuy of Offers will be Accepted

C.1. REQUIRED DOCUMENTS TO COMPLETE AND SUBMIT

The Offeror shall submit the listed documents in BidBuy under the Attachments tab in the appropriate "Required Attachments" spaces.

- Vendor Disclosure or IPG Active Registered Vendor Disclosure
- Technical response
- Information and Technology Request for Proposal - Offer to the State of Illinois
- Commitment to Diversity
- Pricing
- BEP Utilization Plan
- VET Utilization Plan

Blank documents may be found on the Chief Procurement Officer for General Service's website at <https://cpo-general.illinois.gov/solicitation-and-contract-templates.html> and on the BidBuy posting under "File Attachments:". Business Enterprise Program/Veterans Small Business Program Utilization Plan may be downloaded from the Commission on Equity and Inclusion's website at

<https://cei.illinois.gov/purchasing-entity-resources/compliance.html>.

Failure to submit Vendor Disclosure or IPG Active Registered Vendor Disclosure, as applicable, and the Utilization Plan(s), as applicable, with the Offer submitted in BidBuy shall render the Offer non-responsive.

Offerors are required to submit their response to the State's solicitation through BidBuy. Any information sent to the State outside of BidBuy, for example by US Mail, FedEx, UPS, e-mail, or hand delivery, will neither be accepted nor considered. Offeror submissions will only be considered if they are received through BidBuy and on or before the time and date indicated as the "Bid Opening Date" on the BidBuy posting. Any required attachments must be submitted via BidBuy.

Price entries on the Items tab will be locked automatically upon submission of the quote. **Entering cost, pricing or discount information in the Alternate Description may result in disqualification.** If the agency requires pricing to be submitted in an attachment, Offeror shall upload pricing under the "Required Documents" section on the Attachments tab and check the box "Does the attachment contain any pricing, cost or discount information?". Failure to check this box allows your pricing to be viewed when bids are opened and will result in disqualification of your offer. NOTE: Do not check "Does the attachment contain any pricing, cost or discount information" if the attachment does NOT include pricing, cost, or discount information.

Documents shall be submitted in an electronic format that is accessible and readable using Microsoft Office suite software or Adobe Reader. Corrupted files shall not be considered. It is the Offeror's responsibility to check that files are accessible and legible after uploading.

The Offeror is solely responsible for ensuring timely submission of their electronic solicitation response. Failure to allow adequate time prior to the Bid Opening Date to complete and submit a response to a solicitation, particularly in the event technical support assistance from the State is required, places the Offeror and their offer or response at risk of not being accepted.

The State encourages the Offeror to ensure that their BidBuy account is up to date. It is recommended that you access your BidBuy account prior to the solicitation due date and time to make sure that your company's information is up-to-date and your password is current. Files may be uploaded at any time prior to submission.

File size may impact the uploading and downloading speed and may lead to browser time-outs, resulting in failed upload/download attempts. Please consider this dependency when attaching very large documents.

OFFEROR INSTRUCTIONS TO SUBMIT IN BIDBUY

Create Quote:

General Tab	: Save and Continue
Items Tab	Follow instructions in the Pricing section of the solicitation document as to whether pricing will be entered in the Unit Cost of the Items Tab or submitted as a separate Pricing Document in the Attachments Tab. Note: any pricing entered in the Unit Cost of the Items Tab will be locked until after Technical Evaluations take place. Do not enter cost, pricing, or any discount information in the Alternate Description field. Entering cost, pricing or discount information in the Alternate Description may result in disqualification.
Terms and Conditions Tab	: Select "Yes", "No", or "Yes with Exceptions"

	Note: If taking any exceptions to Standard Terms and Conditions an Offeror must submit a redline version of the Standard Terms and Conditions with their proposal.
Attachments Tab	For each required quote attachment listed: : "Upload" (next to each required attachment) : "Choose File" Note: If a pricing document is required, mark the box next to the question, "Does this attachment contain any pricing, cost, or discount information?" Failure to mark this box when attaching a pricing document will result in disqualification. Check this box ONLY if a separate pricing document is required. Do NOT check this box for any other required quote attachment such as the Technical Proposal, Vendor Disclosure / IPG Active Registered Vendor Disclosure, or Utilization Plan(s), or Offer.
Summary Tab	: "Submit Quote"

Offerors may also view the "Request for Proposal (RFP) Vendor Submission Instructions Video found at <https://cpo-general.illinois.gov/vendor-resources.html>

C.2. DUE DATE AND TIME FOR SUBMISSION OF OFFERS

Each solicitation contains the Offer due date and time, appearing as the "Bid Opening Date:" on the BidBuy posting. Offeror shall submit Offers in BidBuy, and the State shall open Offers electronically in BidBuy on the "Bid Opening Date". The Offer must remain firm for 180 days from opening.

C.3. CONFLICT BETWEEN INFORMATION IN ELECTRONIC DOCUMENTS AND ON BIDBUY

If the State provides information in electronic documents (i.e., the RFP and other attachments) that is different or in conflict with the information the State provides on BidBuy, then the information in electronic documents is presumed to represent the State's intent. If the Offeror provides information in electronic documents that is different or in conflict with the information the Offeror provides in BidBuy through their Seller Account, then the information in electronic documents shall represent the Offeror's intended submission.

C.4. PUBLISHED PROCUREMENT INFORMATION

The State publishes procurement information, including solicitations, awards, and amendments, on the Chief Procurement Officer for General Services' Illinois Procurement

Bulletin, known as the Bulletin or BidBuy (<https://www.bidbuy.illinois.gov/bs/>). Procurement information may not be available in any other form or location. Offeror is responsible for monitoring BidBuy. The State will not be held responsible if Offeror fails to receive the optional e-mail notice of future amendments to the solicitation.

C.5. INFORMATION CONTACT

The individual listed in the "Info Contact:" field on the BidBuy posting shall be the single point of contact for this solicitation. Unless otherwise directed, Offeror should only communicate with the Information Contact. The State/Agency shall not be held responsible for information provided by or to any other person.

Suspected errors should be immediately reported to the Information Contact. Do not discuss, directly or indirectly, the solicitation or any Offer with any State officer or employee other than the Information Contact.

C.6. OFFEROR QUESTIONS AND AGENCY RESPONSE

All questions, other than questions raised at the Pre-Submission Conference, pertaining to this solicitation must be submitted in writing to the Information Contact no later than *October 19, 2026*. Questions received and Agency responses may be posted as a Bid Amendment to the original solicitation on BidBuy; only these posted answers to questions shall be binding on the State. Offeror is responsible for monitoring BidBuy and BidBuy email notifications.

C.7. PRE-SUBMISSION CONFERENCE

The Agency may conduct a Non-Mandatory Pre-Submission Conference, listed in the "Pre-Bid Conference:" field of the BidBuy posting. Please refer to BidBuy for this information.

If attendance is mandatory, Offeror (current contractor included) will be disqualified and considered non-responsive if Offeror does not attend, is not on time, leaves early, or fails to sign the attendance sheet. Offeror must allow adequate time to accommodate security screenings at the site.

Join from the meeting link

<https://illinois.webex.com/illinois/j.php?MTID=m9423adb22ce4c315be82082a8bc2f574>

Join by meeting number

Meeting number (access code): 2866 458 5078

Meeting password: 2nMrZfPea27

Tap to join from a mobile device (attendees only)
[+1-312-535-8110](tel:+1-312-535-8110),28664585078## United States Toll (Chicago)
[+1-415-655-0002](tel:+1-415-655-0002),28664585078## US Toll

C.8. SMALL BUSINESS SET-ASIDE

In the Bulletin posting, if "Yes" is shown to the question "Is this a Small Business Set-Aside Procurement?", then Offeror must be registered by the Illinois Small Business Set-Aside Program at the time Offers are due for the Offer to be evaluated. For requirements on qualifying Offeror's business in the Small Business Set-Aside Program, please go to the Chief Procurement Office for General Service's website at <https://cpo-general.illinois.gov/sell-2-illinois.html>.

C.9. BUSINESS ENTERPRISE FOR MINORITIES, WOMEN, AND PERSONS WITH DISABILITIES ACT PARTICIPATION AND UTILIZATION PLAN

The BidBuy posting indicates whether this solicitation contains a goal to include businesses owned and controlled by minorities, women, and persons with disabilities. If this solicitation contains a goal, then failure to complete and submit a Utilization Plan, including documentation demonstrating good faith efforts when requesting a waiver, shall render the Offer non-responsive. 30 ILCS 575/4(e). All questions regarding the subcontracting goal must be directed to the Information Contact indicated in BidBuy no later than [October 19, 2026]. See the Utilization Plan for NIGP codes used to establish this goal.

BEP Goal: 34%

Go to <https://cei.illinois.gov/vendor-resources/get-bep-certified.html> for complete requirements for BEP certification. Go to State of Illinois Commission on Equity and Inclusion at <https://supplierdiversitymanagementportal.illinois.gov/home.aspx> to search for certified BEP vendors.

C.10. VETERAN SMALL BUSINESS PARTICIPATION AND UTILIZATION PLAN

The BidBuy posting indicates whether this solicitation contains a goal to include businesses owned and controlled by military veterans. If this solicitation contains a goal, then failure to submit a Utilization Plan as instructed later in this solicitation may render the Offer non-responsive. All questions regarding the subcontracting goal must be directed to the Information Contact indicated in BidBuy no later than [October 19, 2026]. See the Utilization Plan for NIGP codes used to establish this goal.

VBP Goal: 2%

Go to <https://cei.illinois.gov/programs0/veterans-business-program.html> for complete requirements for Veteran Owned Small Business (VOSB) or Service-Disabled Veteran Owned Small Business (SDVOSB) certification. Go to State of Illinois Commission on Equity and Inclusion at <https://supplierdiversitymanagementportal.illinois.gov/home.aspx> to search for certified VOSB and SDVOSB vendors.

C.11. TERMS AND CONDITIONS

The Information and Technology Standard Terms and Conditions will become a part of any resulting contract. To view the Information and Technology Standard Terms and Conditions, please go to

<https://cpo-general.illinois.gov/solicitation-and-contract-templates.html>.

Section D. EVALUATION PROCEDURES

D.1. EVALUATION PROCESS

The State assesses each Offer for Responsibility (E.10) and Responsiveness. The State considers the information provided and the quality of that information when assessing Offers. If the State finds a failure or deficiency, the State may reject the Offer or reflect the failure or deficiency in the assessment.

There are three scored parts to each proposal – technical, commitment to diversity, and pricing. Each part of the proposal is evaluated and ranked independently of the other parts of the proposal. The results of the evaluation of all three parts shall be used in ranking the proposals.

The State may award to the most responsive and responsible Offeror whose offer best meets the specified criteria.

D.2. RESPONSIVENESS

A responsive Offeror is one who submits an offer that conforms in all material respects to the Request for Proposal and includes all required forms.

D.2.1. The State will determine whether the Offeror complied with the instructions for submitting offers. Except for late submissions, and other requirements that by law must be part of the submission, the State may require that an Offeror correct deficiencies as a condition of further evaluation.

D.2.2. Subcontractor Disclosure: If the Offer includes any subcontractors, then Offeror shall complete the Subcontractor Disclosure section of the Offer to the State of Illinois.

D.2.3. If completing IPG Active Registered Vendor Disclosure, then responsiveness may include and may not be limited to:

- Active Illinois Procurement Gateway registration # with expiration date
- Certifications timely to this solicitation
- Disclosure of lobbyists for Offeror and parent entity(ies)
- Disclosure of pending and current contracts

D.2.4. If completing Vendor Disclosure, required parts may include and may not be limited to:

- Business and Directory Information: Offeror should complete and return the Business and Directory Information form in Vendor Disclosure, Part 1.
- Illinois Department of Human Rights (IDHR) Public Contracts Number: Offeror shall complete and return the IDHR Public Contracts Number form in Vendor Disclosure, Part 2.
- Authorized to Transact Business or Conduct Affairs in Illinois: A person (other than an individual acting as a sole proprietor) must be a duly constituted legal entity prior to submitting an Offer and authorized to transact business or conduct affairs in Illinois prior to execution of the contract. For more information, see Authorized to Transact Business or Conduct Affairs in Illinois in Vendor Disclosure, Part 3.
- Standard Illinois Certifications: Offeror shall complete and return the Standard Illinois Certifications form in Vendor Disclosure, Part 4.
- State Board of Elections Registration: Offeror may be prohibited from making political contributions and be required to register with the State Board of Elections. For more information, see State Board of Elections in Vendor Disclosure, Part 5.
- Disclosure of Business Operations with Iran: Offeror should complete and return the Disclosure of Business Operations with Iran form in Vendor Disclosure, Part 6.
- Financial Disclosures and Conflicts of Interest: Offeror shall complete and return the Financial Disclosures and Conflicts of Interest form in Vendor Disclosure, Part 7.
- Taxpayer Identification Number: Offeror should complete and return the Taxpayer Identification form in Vendor Disclosure, Part 8.

D.2.5. The State will determine whether the Offer meets the stated Technical requirements. Minor differences or deviations that have negligible impact on the price or suitability of the supply or service to meet the State's needs may be accepted or corrections allowed. If no Offeror meets a particular Technical requirement, the State may waive that requirement.

D.2.6. When the specification calls for "Brand Name or Equal," the brand name product is acceptable. Other products will be considered with proof that the other product meets stated specifications and is equivalent to the brand product in terms of quality, performance, and desired characteristics.

D.3. EVALUATION METHODOLOGY

The Technical Requirements are described in Sections F.2. and F.3. The State evaluates the Technical Requirements without consideration of price.

D.3.1. Total Number of Points Available for Technical Requirements is: 625

D.3.2. Offeror shall complete and return Sections F.2. and F.3.

D.3.3. Relative Weight in Point Format

Technical Requirements	Points Available
Mandatory Requirements with Evidence (F.2.)	0; all must be met and are evaluated as pass or fail
F.3.1 Federal claiming and reporting approach	75
F.3.2 Eligibility review and revenue protection approach	75
F.3.3 Revenue identification and cost recovery	50
F.3.4 Systems maintenance and development approach	75
F.3.5 Transition and continuity plan	75
F.3.6 Staffing plan and key personnel qualifications	75
F.3.7 Audit and compliance support approach	50
F.3.8 Past performance on comparable engagements	75
F.3.9 Knowledge transfer and sustainability	75
Technical Total	625

D.4. COMMITMENT TO DIVERSITY ELEMENTS

Sections 20-15 and 35-30 of the Illinois Procurement Code (30 ILCS 500/) require Offerors to be evaluated on their commitment to diversity. The points available for Commitment to Diversity are described in Section F.4. and are equivalent to 20% of the Technical Requirements points. The State evaluates Commitment to Diversity without consideration of price.

D.4.1. The total number of points for Commitment to Diversity is: **125**

D.4.2. Offeror shall complete and return Section F.4 Commitment to Diversity

D.4.3. Commitment to Diversity Categories: The percentages at the end of each section reflect the weighted distribution of points available identified in D.4.1.

Commitment to Diversity Categories
Category 1 – BEP Compliance - Whether the Offeror meets the set goal for contracting or subcontracting with businesses owned by women, minorities, or persons with disabilities or completed a Good Faith Effort Waiver for this procurement. 5%

Category 2 – Subcontracting/Contracting with any WMD businesses (not limited to BEP vendors) - Whether the Offeror has contracted/subcontracted within the prior calendar year with businesses owned by women, minorities, or persons with disabilities. 10%
Category 3 – Diversity, Equity and Inclusion (DEI) Spend – Offeror’s percentage of business, education and/or community spend from prior calendar year gross revenue that involves businesses owned by women, minorities and/or persons with disabilities. The assisted businesses are not required to be certified in the Illinois Business Enterprise Program. 20%
Category 4 – DEI Time - Offeror’s hours spent in the prior calendar year on promoting DEI in the workplace, the community, education institutes, or supporting businesses owned by women, minorities, or persons with disabilities. The assisted business is not required to be certified in the Illinois Business Enterprise Program. The success or failure of each event does not impact the points achieved. The event may be voluntary or paid time. 20%
Category 5 – DEI Policies - The vendor has provided a written copy/screenshot of their current written workforce diversity, equity, and inclusion (“DEI”) policy. The policy provided must be actionable plans, not overarching concepts around DEI. 10%
Category 6 – Diversity in Staffing - % of individuals on governing board and/ or Senior executives who identify as women, minorities or person with disabilities. 10% % of individuals in management /supervisor positions who identify as women, minorities or person with disabilities. 13% % of total staff who identify as women, minorities or person with disabilities. 12%

D.5. MINIMUM REQUIRED POINTS

Requests for Proposal may specify that Offerors must receive a minimum number of points in their Technical and Commitment to Diversity proposals combined to be considered for price evaluation and award.

The State determines how well offers meet the Technical and Commitment to Diversity requirements and rank the offers from best to least qualified using a point ranking system (unless otherwise specified) as an aid in conducting the evaluation. Offerors who receive fewer than the minimum required points will not be considered for price evaluation and award.

D.5.1. The total number of available points for Technical and Commitment to Diversity is: **750**

D.5.2. A minimum of **563** of the available Technical and Commitment to Diversity points (75%) is required for price evaluation and award consideration.

D.6. PRICE

The State opens Price proposals after evaluating all Technical and Commitment to Diversity proposals.

If the State does not consider the price to be fair and reasonable and negotiations fail to meet an acceptable price, the State reserves the right to cancel the award and take appropriate action to meet the needs of the State. The State determines whether the

price is fair and reasonable by considering the offer, including the Offeror's qualifications, the Offeror's reputation, all price proposals submitted, other known prices, the project budget, and other relevant factors.

D.6.1. The total number of points for Price is: **125**

D.6.2. The State will determine Price points using the following formula:

Maximum Price Points X (Lowest Price/Offeror's Price) = Total Price Points

For purposes of this calculation, "Price" means the Offeror's 10-Year Total as calculated on the Summary tab of the Pricing Schedule (Section G.2.). The Pricing Schedule contains Agency-established estimated hours for each position. Offerors propose firm hourly rates only. The adequacy of proposed staffing approaches is evaluated under the technical criteria in Section F.3., not under price.

D.7. MAXIMUM AVAILABLE POINTS

The maximum number of points is **625** (Technical) + **125** (Commitment to Diversity) + **125** (Price) = **875** maximum available points.

Section E. ADMINISTRATIVE REQUIREMENTS

E.1. GOVERNING LAW AND FORUM

Illinois law and rules govern this solicitation and any resulting contract. Offeror must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois. This document contains statutory references designated with "ILCS". To view the full text, go to <https://ilga.gov/Legislation/ILCS/Chapters> . The Illinois Procurement Code (30 ILCS 500) and the Standard Procurement Rules (44 ILL. ADM. CODE PART 1) are applicable to this solicitation. To view them respectively, go to [Illinois General Assembly - 30 ILCS 500/ Illinois Procurement Code](#) and [Illinois General Assembly - ADMINISTRATIVE CODE](#).

E.2. PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT

Offers become the property of the State. All offers will be open to the public under the Illinois Freedom of Information Act (FOIA) (5 ILCS 140) and other applicable laws and rules, unless Offeror requests in its Offer that the State treat certain information as confidential. A request for confidential treatment will not supersede the State's legal obligations under FOIA. The State will not honor requests to keep entire Offers confidential. Offerors must show the specific grounds in FOIA or other law or rule that support confidential treatment. Regardless, the State will disclose the successful Offeror's name, the substance of the Offer, and the price.

If Offeror requests confidential treatment, Offeror must submit additional copy/copies (see Instructions for Submission of Offers in Section C.) of the Offer with proposed confidential information redacted. This redacted copy must tell the general nature of the material removed and shall retain as much of the Offer as possible. In a separate attachment, Offeror shall supply a listing of the provisions identified by section number for which it seeks confidential treatment and identify the statutory basis or bases under Illinois law, including a detailed justification for exempting the information from public disclosure.

Offeror will hold harmless and indemnify the State for all costs or damages associated with the State defending Offeror's request for confidential treatment. Offeror agrees that the State may copy the Offer to facilitate evaluation, or to respond to requests for public records. Offeror warrants that such copying will not violate the rights of any third party.

E.3. MINORITY CONTRACTOR INITIATIVE

The State requires a fee of \$15 to cover expenses related to the administration of the Minority Contractor Opportunity Initiative. Any Offeror awarded a contract of \$1,000 or more under Section 20-10, 20-15, 20-25 or 20-30 of the Illinois Procurement Code (30 ILCS 500) is required to pay a fee of \$15. The Comptroller shall deduct the fee from the first check issued to the Vendor under the contract and deposit the fee in the Comptroller's Administrative Fund. 15 ILCS 405/23.9.

E.4. FEDERAL FUNDS

The resulting contract may be partially or totally funded with Federal funds. Upon notice of intent to award, the percentage of supplies and/or services involved that are Federally funded and the dollar amount of such Federal funds will be disclosed.

E.5. EMPLOYMENT TAX CREDIT

Offerors who hire qualified veterans and certain ex-offenders may be eligible for tax credits. 30 ILCS 500/45-67 and 45-70. Please contact the Illinois Department of Revenue (217-524-4772) for information about tax credits [35 ILCS 5/216, 5/217].

E.6. RESERVATIONS

Offeror must read and understand the solicitation and tailor the Offer and all activities to ensure compliance. The State reserves the right to amend the solicitation, reject any or all offers, award by item/services, group of items/services, or grand total, and waive minor defects. The State may request a clarification, inspect Offeror's premises, interview staff, request a presentation, or otherwise verify the contents of the Offer, including information about subcontractors and suppliers. The State may request Best & Final Offers when appropriate. The State will make all decisions on compliance, evaluation, and terms and conditions, and shall make decisions in the best interests of the State and in accordance

with the Illinois Procurement Code, rules and other applicable State and Federal statutes and regulations. This competitive process may require that Offeror provide additional information and otherwise cooperate with the State. If an Offeror does not comply with requests for information and cooperate, the State may reject the offer as non-responsive to the solicitation. Submitting an offer does not entitle Offeror to an award or a contract. Posting a vendor's name in a Bulletin notice does not entitle the vendor to a contract. The State is not responsible for and will not pay any costs associated with the preparation and submission of any offer.

Awarded Offeror(s) shall not commence and will not be paid for any billable work undertaken prior to the date all parties execute the contract, unless approved in writing in advance by the State Purchasing Officer or the Chief Procurement Officer (or designee).

E.7. AWARD

The State is not obligated to award a contract pursuant to this solicitation. If the State issues an award, the award will be made to the responsive and responsible Offeror whose offer best meets the specified criteria unless otherwise permitted by the Illinois Procurement Code and Illinois Administrative Code. However, if the State does not consider the price to be fair and reasonable and negotiations fail to meet an acceptable price, then the State reserves the right to cancel the award and take appropriate action to meet the needs of the State. The State will determine whether the price is fair and reasonable by considering the offer, including the Offeror's qualifications, the Offeror's reputation, all prices submitted, other known prices, the project budget and other relevant factors. The State will post a notice to the Bulletin identifying the apparent most responsive and responsible Offeror.

E.8. INVOICING ADDRESS

The awarded Vendor shall invoice at the completion of the contract unless invoicing is tied in the contract to milestones, deliverables, or other invoicing requirements agreed to in the contract. The Bulletin posting contains the "Bill-to Address:" where invoices should be sent.

Vendor shall not bill for any taxes unless accompanied by proof that the State is subject to the tax. If necessary, Vendor may request the applicable Agency's Illinois tax exemption number and Federal tax exemption information.

E.9. PROTEST REVIEW OFFICE

Offeror may submit a written protest to the Protest Review Office following the requirements of the Standard Procurement Rules. 44 ILL. ADM. CODE 1.5550. For protests related to specifications, the Protest Review Office must physically receive the protest no later than fourteen (14) days after the solicitation or related addendum was

posted to the Bulletin. For protests related to rejection of individual proposals or awards, the protest must be received by close of business no later than fourteen (14) days after the protesting party knows or should have known of the facts giving rise to the protest. The Protest Review Office's information is as follows:

Chief Procurement Office
Attn: Protest Review Office
Email: cpogs.pro@illinois.gov

E.10. RESPONSIBILITY

A responsible Offeror is one who has the capability in all respects to perform fully the contract requirements and who has the integrity and reliability that will assure good faith performance. The State determines whether the Offeror is a "responsible" Offeror; an Offeror with whom the State can or should do business. For example, the State may consider the following:

E.10.1.A "prohibited bidder" includes any person assisting an employee of the State of Illinois by reviewing, drafting, directing, or preparing any invitation for bids, a request for proposal, or request of information, or providing similar assistance unless such assistance was part of a publicly issued opportunity to review drafts of all or part of these documents. For purposes of this section, an employee of the State of Illinois means one who, by the nature of his or her duties, has the authority to participate personally and substantially in the decision to award a State contract. No person or business shall submit specifications to a State agency unless requested to do so by an employee of the State. No person or business that contracts with a State agency to write specifications for a particular procurement need shall submit a bid or proposal or receive a contract for that procurement need.

Nothing herein is intended to prohibit a vendor from bidding or offering to supply developing technology, supplies or services after providing the State with a demonstration of the developing technology, supplies, or services; provided the subject of the demonstration to the State represents industry trends and innovation and is not specifically designed to meet the State's needs. Nothing herein is intended to prohibit a person or business from submitting a bid or offer or entering into a contract if the person or business: (i) initiates a communication with an employee to provide general information about products, services, or industry best practices and, if applicable, that communication is documented in accordance with Section 50-39 of the Illinois Procurement Code or (ii) responds to a communication initiated by an employee of the State for the purposes of providing information to evaluate new products, trends, services, or technologies.

E.10.2. Other factors that the State may use to evaluate to determine responsibility include, but are not limited to: political contributions, certifications, conflict of interest, financial disclosures, taxpayer identification number, past performance in business or industry, references (including those found outside the Offer), compliance with applicable laws, financial responsibility, insurability, effective equal opportunity compliance, payment of prevailing wages if required by law, capacity to produce or sources of supply, and the ability to provide required maintenance service or other matters relating to the Offeror's ability to deliver in the quality and quantity within the time and price as specified in this solicitation.

E.10.3. Awarded Offerors must always have financial resources sufficient, in the opinion of the State, to ensure performance of the contract and must provide proof upon request. The State may require a performance bond if, in the opinion of the State, it ensures performance of the contract. The State may terminate the contract, consistent with the termination for cause provision of the contract, if the vendor lacks the financial resources to perform under the contract.

E.10.4. The State may require that an Offeror correct any deficiencies as a condition of further evaluation.

E.11. BidBuy Terminology and Guidance: BidBuy is an online e-procurement system. There may be some difference between the procurement terminology used in this solicitation and the terms used in BidBuy. Please learn more about BidBuy by accessing the online resources found here:

<https://pathway2procurement.illinois.gov/bidbuy.html>

Section F. PROPOSAL FORMS

Offeror must complete and return:

- The following two (2) tables include:
 - Technical Requirements: Mandatory Requirements with Evidence (Section F.2), and
 - Proposed Technical Solution (Section F.3)
- Commitment to Diversity (Section F.4)
- Information and Technology Request for Proposal - Offer to the State of Illinois

Please read and follow each instruction carefully.

F.1. CONTRACT REQUIREMENTS

The Draft Contract (Attached as G.1.) contains all contract obligations, including scope of work, staffing requirements, key personnel, service levels, reporting, data ownership, work product ownership, transition obligations, and all other terms and conditions that will govern the resulting contract. By submitting an Offer, the Offeror agrees to perform in accordance with the Draft Contract. Offerors should review the Draft Contract in its entirety before preparing their technical response and pricing.

F.2. MANDATORY REQUIREMENTS WITH EVIDENCE

Please check "Met" to each of the mandatory requirements for the proposed solution. An Offeror that does not provide substantiating evidence for each requirement will be disqualified and the rest of the proposal will not be scored.

These Mandatory Requirements shall be included in any contract resulting from this solicitation.

Please provide substantiating evidence in your Proposed Technical Solution. Use the column on the right to indicate the section and page number where your evidence/response to each item may be found. The State will evaluate Offeror's evidence/response to verify the mandatory requirement is met.

MANDATORY REQUIREMENTS WITH EVIDENCE		Proposal Section and Page Number
F.2.1. Experience with state child welfare federal claiming. The Offeror must demonstrate experience providing federal revenue enhancement, federal claiming, or Title IV-E eligibility determination services to at least one state child welfare agency within the past ten years. Evidence may include executed contract documents, engagement summaries describing the scope and duration of services provided, or client letters confirming the nature and period of engagement. Experience is not required to be specific to Illinois or to DCFS systems.	☐ Met	
F.2.2. IT capability across required platforms. The Offeror must demonstrate organizational capability to provide development, maintenance, and support services in both a legacy mainframe environment (COBOL, IMS DB2) and a modern web application environment (.NET, SQL Server). Evidence may include project history, organizational experience descriptions, or subcontractor arrangements demonstrating the Offeror's ability to staff both environments.	☐ Met	

F.3. PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS

Please explain how your organization meets or will meet each of the desirable elements. Use the column on the right to indicate the section and page number of your proposal where your response to each item may be found.

PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS	Point Value	Proposal Section and Page Number
F.3.1. Federal claiming and reporting approach. Describe the proposed approach to preparing, validating, and submitting federal claims and reports across all funding streams identified in Section 1.2.1. of the Draft Contract, including Title IV-E, Title IV-B, TANF, and Medicaid. The response should address the Offeror's process flows, quality control measures, and key activities and deliverables for ensuring that all claims and reports are complete, accurate, and submitted within federal and State deadlines.	75	
F.3.2. Eligibility review and revenue protection approach. Describe the proposed approach to Title IV-E eligibility determination and redetermination, including initial eligibility reviews, court order language reviews, adoption assistance and guardianship assistance subsidy reviews, oversight of child-specific claiming, and identification and correction of eligibility issues impacting federal revenue. The response should address the Offeror's processes for ensuring that eligibility determinations are accurate, properly documented, and support the Department's compliance with federal standards.	75	
F.3.3. Revenue identification and cost recovery. Describe the proposed approach to identifying additional allowable federal funding, including analysis of service populations, provider contracts, administrative costs, and Department expenditures.	50	

PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS	Point Value	Proposal Section and Page Number
The response should explain the Offeror’s methodology for reviewing current spending against federal claiming rules and provide examples of potential revenue maximization opportunities and the Offeror’s approach to quantifying the estimated financial impact.		
F.3.4. Systems maintenance and development approach. Describe the proposed approach to maintaining and enhancing the legacy mainframe and modern web-based applications and systems that support the Department’s federal claiming operations, as described in Section B.1.5. of the RFP and in the Draft Contract (Attachment G1). The response should address the Offeror’s processes for supporting and upgrading systems across both environments, maintaining interagency data exchanges, planning for the Comprehensive Child Welfare Information System (CCWIS) transition, and ensuring the ongoing accuracy and availability of systems and data to support all contract functions.	75	
F.3.5. Transition and continuity plan. Describe the proposed approach to transitioning into the role of the incumbent vendor and achieving full operating capability without disrupting active claiming cycles, eligibility determinations, or audit activities. The response should include the Offeror’s plan for knowledge transfer from the incumbent, onboarding and training of Offeror staff, obtaining required system access, a phased timeline for assumption of responsibility for each contract function, the Offeror’s approach to risk identification and mitigation during the transition, and how the Offeror will ensure continuity of federal revenue. The Offeror should include a preliminary transition timeline and schedule.	75	
F.3.6. Staffing plan and key personnel qualifications. Provide a proposed organizational chart, staffing plan, and approach to staff retention and knowledge management across the ten-year contract term. The response should describe how the Offeror will structure its team to perform the services described in the Draft Contract, how the Offeror will identify and recruit qualified staff for each functional area, and how the Offeror will ensure continuity of qualified personnel throughout the contract term. The Offeror should describe its approach to onboarding, cross-training, and succession planning to minimize disruption from staff turnover.	75	
F.3.7. Audit and compliance support approach. Describe the proposed approach to supporting the Department through federal and State audit and review activities, including Title IV-E Foster Care Eligibility Reviews, the Statewide Single Audit, federal PACAP reviews, and any associated federal disallowances, deferrals, or compliance findings. The response should address the Offeror’s methodology for providing documentation and support to the Department, responding to auditor requests, and representing the Department in audit meetings and appeals. The Offeror should describe its proposed processes for identifying and mitigating audit risks proactively.	50	
F.3.8. Past performance on comparable engagements. Please provide three examples of engagements within the past ten years that demonstrate the Offeror’s performance on projects comparable in size, scope, and complexity to the services	75	

PROPOSED TECHNICAL SOLUTION – DESIRABLE ELEMENTS	Point Value	Proposal Section and Page Number
described in this RFP. For each engagement, the Offeror should identify the client agency, the scope of services provided, the contract term, and the outcomes achieved. The Offeror should describe how the work performed and results obtained are relevant to the requirements of this RFP.		
F.3.9. Knowledge transfer and sustainability. Describe the proposed approach, methodologies, and tools for documenting federal claiming business processes, system requirements and functionality, and operational procedures. The response should explain how the Offeror will develop and maintain documentation, provide training and knowledge transfer to Department staff, and ensure that the Department can sustain federal claiming operations without dependence on the Offeror or any specific individuals. The Offeror should describe its proposed transition-out plan to transfer knowledge to the Department or a successor contractor at the end of the contract term.	75	

F.4. COMMITMENT TO DIVERSITY

Commitment to Diversity Vendor Guidance including Vendor Submission Forms are located on the Chief Procurement Officer for General Service's website at <https://cpo-general.illinois.gov/commitment-to-diversity/c2d-guidance.html> and on the BidBuy posting under "File Attachments:"

F.5. PRICING

F.5.1. FORMAT OF PRICING:

F.5.1.1. Offeror shall complete the Pricing Schedule Template provided in Section G.2. and upload it as a pricing attachment in BidBuy. This attachment must be marked as "Pricing Related" when uploading. The Pricing Schedule is the sole pricing document for this solicitation. The 10-Year Total on the Summary tab of the Pricing Schedule is the Offeror's proposed price for evaluation under Section D.6. Failure to submit the completed Pricing Schedule or to mark it as Pricing Related may render Offeror's entire Offer non-responsive and ineligible for award.

F.5.2. TYPE OF PRICING: The Illinois Office of the Comptroller requires the State to indicate whether the contract pricing is firm or estimated at the time it is submitted for obligation. Pricing pursuant to this contract is firm.

F.5.3. EXPENSES ALLOWED: Expenses are not allowed.

F.5.4. TAXES: Pricing shall not include any taxes unless accompanied by proof the State is subject to the tax. If necessary, Offeror may request the

applicable agency's Illinois tax exemption number and federal tax exemption information.

- F.5.5. OFFEROR'S PRICING OFFER: Offeror shall submit pricing using the Pricing Schedule Template provided in Section G.2. The Pricing Schedule contains Agency-established estimated annual hours for each staff position. Offeror shall enter a fully loaded hourly rate for each position in the shaded cells on the "Detailed Pricing" tab for each contract year. The "Summary" tab will automatically calculate annual not-to-exceed totals and a 10-year contract total based on the detailed inputs.

The completed Pricing Schedule must be uploaded as an attachment in BidBuy and marked as "Pricing Related." The Pricing Schedule attachment is the sole pricing submission required. Failure to complete the Pricing Schedule or to upload and properly mark the attachment may result in disqualification.

Section G. ATTACHMENTS AND EXHIBITS

- G.1. Draft Contract, including all sections and attachments
- G.2. Pricing Schedule Template. Offerors must complete and upload this form as a pricing attachment in BidBuy per Section F.5.
- G.3. Managed Care Interface Flow Chart
- G.4. Children's Account Section Procedures - Table of Contents
- G.5. Eligibility Determination Unit (EDU) Manual - Table of Contents
- G.6. Technical Support Unit Manual (TSU) - Table of Contents

In compliance with the State and Federal Constitutions, the Illinois Human Rights Act, the U.S. Civil Rights Act, and Section 504 of the Federal Rehabilitation Act, the State of Illinois does not discriminate in employment, contracts, or any other activity.

The State of Illinois encourages prospective vendors to consider hiring qualified veterans and Illinois residents discharged from any Illinois adult correctional center, in appropriate circumstances.