



**State of Oklahoma
Office of Management and Enterprise Services
Central Purchasing Division**

Amendment of Solicitation

Date of Issuance: 10/19/2015

Solicitation No. 0920000009

Requisition No. 0920000009

Amendment No. 1

Hour and date specified for receipt of offers is changed: No Yes, to: _____ 3:00 PM CST/CDT

Pursuant to OAC 580:16-7-30(d), this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery or Personal or Common Carrier Delivery:

Office of Management and Enterprise Services,
Central Purchasing Division
Will Rogers Building
2401 N. Lincoln Blvd., Suite 116
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Description of Amendment:

a. This is to incorporate the following:

Please see below answers to vendor questions. No further questions will be accepted.
Also posted are Word versions of solicitation documents for vendor convenience.

1. Is the State open to accepting proposals for cloud-based solutions?'

Yes.

2. When is the State planning on responding to RFP questions? Answers to some questions will determine vendor participation in this RFP.

Per E.4.2 the anticipated date to post responses to questions is Monday, October 19, 2015

3. Did the State evaluate solutions that could meet its requirements through vendor demonstrations leading up to the RFP release? If so, what types and names of solutions and vendors were evaluated?

TSET requested demonstrations by MicroEdge GIFTS and Brommelkamp. Both vendors accommodated those requests by demonstrating the functionality of their grants management database systems.

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4. What are the anticipated number of internal named users that will require access to the solution? Can you please define each of the user types/roles?

There will be approximately 25 licensed users to begin with and that number will likely expand to include 10-20 additional people based on the need to add users with new roles as we implement use of the system on an increasingly broad-based level.

The grants management roles will include but not necessarily be limited to the following:

Grants Management Director
Director of Programs
Executive Director
Director of Finance
Contracts Officer
Program Officer
Health Communications Director
Health Communications Consultant
Administrative Support
Viewer Only
TSET Board Member – This is not a certainty
External Reviewer
External Evaluator
External Consultant

The contact management roles will include but not necessarily be limited to the following:

Grantee Organization
External Reviewer
Newsletter Recipient
TSET Board Member
Elected Official
Legislative Assistant
Partner Organization

5. What are the anticipated number of external users that will require access to the solution?

This number will grow as we automate across every grant category. We should plan for at least 300 to begin with and anticipate growth to 500 within the first year.

Please note:

We require a system that will allow us to capture and store contact management information for those individuals/organizations that may never receive a TSET grant AND for those that will become grantees.

6. Does the State anticipate any data migration from a legacy system to the new system? If so, how many records?

Yes. The data dump will include 10 years of information from Excel, five years from Intelligrants and a single year from Smartsheet.

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7. Other than PeopleSoft and GuideStar, are there any other integrations to third party systems? If so, please list them.

We may need to consider limited integration to Smartsheet. In addition, we need to access information that may only be accessible from the Internal Revenue Service.

8. You mention email functionality. Would you like the system to integrate with your email system? If so, what do you use for your email? Gmail? Outlook?

We use Outlook and yes, we would consider integration.

9. Does the State require any Change Management for this solution?

We may require assistance in facilitating the switch from use of multiple systems to use of one grants and contacts management database solution to handle most of our business. Information detailing any given vendor's willingness to provide change management services and the cost for those services would be helpful.

10. What type of training does the State prefer? End-user training? Admin Training? Train the trainer?

We will have the need for training to include our grants management team. We may also have the need for training to include the entire TSET Staff and eventually, we may also want to discuss end user training but there is no way to define our training needs with absolute certainty at this point in time but to say the grants management staff will require training provided by the vendor.

11. What is the implementation timeline? When does this system need to be live?

We have planned for purchase in December 2015 with installation by the end of January 2016. The planned go live date for contact management will be first. Go live dates for grants management will likely be across a timeline beginning March 2016 and stretching through September 2016, as we may need to automate one grant category at a time.

12. Does the State require post go live support?

Yes. We need customer support on an ongoing basis.

13. RFP Section A.4.2 indicates that "The Supplier agrees to adhere to the State of Oklahoma "Information Security Policy, Procedures, and Guidelines" If RFP respondent is proposing a multi-tenant cloud-based, fully hosted solution, there are several requirements that are not applicable in these policies, procedures, and guidelines. Will the State accept changes/exceptions to these requirements or vendor defined security requirements applicable to the cloud-based solution being proposed? For example, the State of Oklahoma is currently utilizing cloud solutions from a cloud services provider in which the security requirements are not aligned with these State defined standards as they are not applicable to the cloud services provider model.

It is appropriate to add, "As applicable," to the front of Section A.42. Proposed changes to terms &

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conditions would be fully addressed in the clarification phase with the selected best-value vendor

14. RFP requirements outlined in Section A.45. Ownership Rights are not applicable to a cloud-based solution. For example, A.45.6, states, *“it is understood and agreed that the Software is being developed by the Supplier for the sole and exclusive use of the State of Oklahoma. Moreover, except with regard to any deliverable based on Supplier’s Utilities, the State of Oklahoma shall be deemed the sole and exclusive owner of all right, title, and interest therein, including all copyright and proprietary rights relating thereto.”* The proposed solution will be a fully hosted multi-tenant SaaS solution that runs on the service provider’s cloud-based infrastructure. The SaaS solution will be configured to meet the State’s specific requirements. Cloud Services Provider is not creating any new Intellectual Property for the State. The State’s data, metadata, and artifacts can be exported at any time during the subscription service. Therefore, can the State please remove/modify these requirements accordingly?

Rather than dismantle and parse words from the 7 sections of A.45 at this point, it seems more appropriate for a bidder’s response to delineate which portions of A.45 are inapplicable and why. Proposed changes to terms & conditions would be fully addressed in the clarification phase with the selected best-value vendor

15. Section E7.2 lists what is to be included in a proposal, but it does not allow for us to provide a narrative proposal that details the functionality of our solution and company background. Can this be submitted with documents for the November 3 deadline, or is a detailed proposal such as this part of the Clarification period instead?

The detailed narrative proposal, solution, and company background are not part of the initial response. They would not be seen by the evaluation team. If this information were to be included it would not be reviewed or seen by the evaluation team until if/when a vendor proceeds to the clarification phase. The intent of the submission is to identify the expert vendor based upon verifiable metrics and claims.

16. Attachment B – Cost Proposal....should we be providing a detailed explanation of the functionality included with these costs, or just a number?

For the cost sheet we only need a single number for each of the defined years for comparative purposes; however, if vendors want to provide details breakdown of those costs in the initial response they are free to do so. It would not be evaluated but would be required should a vendor proceed to clarification.

17. Attachment C – Contract Schedule....does this refer to the total length of a contract for the software, or is this just referring to a timeline from contract award to the point the solution is fully implemented? Is the MILESTONE schedule an outline of steps for implementation of the solution?

This refers to the timeline from contract award to full implementation and functionality. The milestone schedule

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would notate the key steps throughout this process.

18. Referring to E.7.2.14. Attachment I – Weekly Risk Report (WRR) Guide, E.7.2.15. Attachment J – Weekly Risk Report (WRR) Template, E.7.2.16. Attachment K – State Expectations. Are actual responses needed for these 3 sections? None are listed as required files in Attachment A.

At minimum vendors must submit the following: Level of Expertise, Risk Assessment, and Value Added (6 pages total). Cost Proposal Form must be submitted along with contract schedule. Vendors also must complete and submit the Responding Bidder Information Sheet (Form CP-076) and Certification for Competitive Bid and/or Contract (Form CP-004). All other documents may be included but would not be considered as part of the evaluation process.

19. How many Internal TSET grant users do you want priced and how many external grant applicant and reviewer users do you want priced?

Please see answers to Questions 4 & 5.

20. Do you have any current grants based data that will need to be migrated into the new system, if so can you provide a level of the type and quantity of data?

Please see answer to Question 6.

Additionally the quantity of the data will vary by fiscal year. Award amounts, actual expenditures and monthly invoicing information from Excel across approximately 10 years will be included in the data dump, as will application, review, award, contracting, reporting and payment data from Intelligrants across four- five grant categories for three to four years. One to two years of data from Smartsheet for a single grant category will need to be migrated as well.

21. Do you have multiple grant programs per year, if so, how many?

We have multiple grant categories and need to automate all processes as related to each of them.

22. An externally hosted Software as a Service (SaaS) solution provides benefits in lower entry cost, consistent predictable annual costs, simplified vendor maintenance and continuous user support with additional value adds. Will the state consider and is the state able to consider using an externally hosted SaaS grant management solution?

Yes.

23. Sections E.7.2 Proposal Content "Submission Deliverables"; Items E.7.2.13-16 (Attachments H-K) are listed as Proposal Content, yet are not included on the Attachment Checklist for submission. We assume these are not required in the in the initial submission, is this correct?

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24. In Attachment K there are some system expectations that don't define how the system will behave according to unknown workflow specifications. This is analogous to asking for a house that naturally will have the windows you spoke of. So how do you expect this to be priced effectively without stating at least the current grant making process? Is this information available?

This approach to bids is designed to have the purchaser articulate a broad-based need and ask vendors, who are known experts, to clearly define how their product can help to meet the need. The State is not the expert on design, installation and implementation of grants management databases, though, in this case, the State understands the need for one. Based on the information provided in the RFP and answers to questions, to include the number of anticipated roles, users and grant categories, vendors are encouraged to do their best in responding to the RFP.

Grant categories are listed on the TSET website at www.tset.ok.gov under "Grant Opportunities."

25. How many staff will be using the system more than 40 hours per month

There is no way to answer definitively, as staff will have to be trained and use of the system is likely to increase over time as employees and grantees become more comfortable with it. To begin with, approximately three-five users will be resident experts and likely to be in the system more than four hours per day or a total of approximately 80 hours per month.

26. Will there be any non-staff or external users accessing the system i.e. Applicants and reviewers. Please provide projected numbers

Please see the answer to Question 5.

27. How many projects will be available?

TSET has a current total of six grant categories.

Here is an approximate breakdown of the number of grants and contracts (these will also likely be automated using the grants management database system) we have at the present time:

50 - TSET Healthy Living Grants

25 - Unsolicited Proposals, Statewide Grants/Contracts and Contracts for Services (Consulting etc...)

20 - Conference Training and Sponsorship Grants

60 - Incentive Grants

TOTAL - 155

The numbers detailed above are approximate in the bottom two categories listed, as those are one time payouts.

