



# Amendment of Solicitation

Date of Issuance: 3/29/2019

Solicitation No. 6280000005

Requisition No. 6280001182

Amendment No. 1

Hour and date specified for receipt of offers is changed:  No  Yes, to: 5/8/2019 3:00 PM CST

Pursuant to OAC 260:115-7-30(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  
ATTN: Sheri Diehm  
3115 N. Lincoln Blvd.  
Oklahoma City, OK 73105

Sheri Diehm  
Contracting Officer

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405-365-1964  
Phone Number

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Sheri.diehm@omes.ok.gov  
E-Mail Address

**Description of Amendment:**

a. This is to incorporate the following:

Question 1: I am attempting to access the State of Oklahoma Communities of Practice wiki site. Unfortunately, I believe a previous colleague set-up an account, but I am not able to login. Who should I contact regarding obtaining access to the information for the RFP? I did complete the Practice Enrollment form. As a company, we are evaluating the project and want to make sure we have all of the details. The first question, I am working to understanding is when potential vendors should be submitting RFP questions?

Answer: Please contact Marc Brown at OMES regarding your questions. His email is Marc.brown@omes.ok.gov. You can also contact the help desk at 405-522-2444.

Question 2: We are struggling to find the VPAT OMES forms. Can you please to post them to the opportunity site or provide a working link?

Answer: Here is the link for VPAT information. [https://www.ok.gov/DCS/Central\\_Purchasing/VPAT\\_&\\_Accessibility.html](https://www.ok.gov/DCS/Central_Purchasing/VPAT_&_Accessibility.html)

Question 3: Ref. Section H.1. Implementation Costs includes line #10 for data migration, yet data migration is not detailed in the RFP. Is this line a mistake?

Answer:

The language located in Section H.1. Implementation Costs, line #10, data migration is correct, and refers to the ability of the proposed System to import data from data sources as mentioned in Section C.6.3.9. More specifically, the Supplier would possibly need to format and import a denormalized database file (e.g. SQL.bak file) or its output (e.g. Excel file); details of this procedure is not available at present and would largely be dependent on the capabilities of the Supplier of current Grants Management Solution used by OCAST, OKGrants.

Question 4: Ref. Section C.8 Implementation Plan describes a training plan. Is the requirement for an implementation plan, training plan or both?

Answer:

Both, please. Section C.8.1 is corrected and states as follows: "Supplier must provide an **implementation** (~~training~~) plan and describe the approach in detail. [...]"

Section C.8.2 is corrected and states as follows: "**Supplier** (~~Vendor~~) must provide a training plan and describe the approach in detail using the following general formatting guidelines: [...]"

Question 5: Ref. Section H.1. Implementation Costs includes line #6 for CRM integration, yet CRM is not defined anywhere in the RFP. Is this a typo?

Answer:

Inclusion of line #6 for Customer Relationship Management (CRM) integration is not a mandatory requirement and is therefore optional; this is a value-added benefit /cost and may be considered in the review process if the functionality is available and determined to be cost-effective value-added benefit/cost.. This cost is associated with Section C.6.3.6 and provides information about System integration capability with other web-based platforms that may be utilized by OCAST either currently or potentially in the near future. The listing of web-based platforms in Section C.6.3.6 is non-exhaustive and includes at least one CRM-based solution.

Section H.1, Table "Implementation Costs", Line #6, "CRM Integration" is corrected and states as follows: "#6 **Customer Relationship Management (CRM) Integration (Optional)**"

Question 6: Please provide a project timeline, including anticipated project start date and system go-live date, for the implementation of the OCAST Grants Management System. Is it OCAST's intent to have the new system available by 07/01/19 or sooner to allow applicants to complete applications for FY20? Answer: The anticipated system go-live date is December 1, 2019, with the first awards made on July 1, 2020 (FY21) at the earliest.

Answer: The anticipated system go-live date is December 1, 2019, with the FY2021 funding competition application submission period for all five grant programs from Jan 15, 2020 – Mar 1, 2020 (approx.), and award contacts start dates made no earlier than July 1, 2020.

Question 7: Please provide access to or copies of the program applications for the five grant programs managed using OKGrants.

Answer: Copies of most current grant programs (AR, HR, HF, IP, PS) are provided as pdf file attachments under "Documents" on the OMES Solicitation page.

Question 8: Please identify the system features OCAST is seeking in a grants management system that are currently not available from the OKGrants system?

Answer:

The tables below reflect identified use case and technical features of current OKGrants system, aspects of which, either in part or in whole, determined as insufficient with OCAST requirements:

From worksheet #1 Use Cases:

Item #	Grant Phase	Action(s)	Mandatory Required System Reaction(s)
4	Pre-Launch	OCAST user(s): 1) creates FOA document page containing requirements for each Award Program; 2) creates Pre-Launch phase template forms/pages, Application phase template forms/pages, Review phase template forms/pages, and Post-Award phase template forms/pages,	System: 1) allows users to view and download published FOAs as pdfs; 2) allows creation of Pre-Launch/Application/Review/Post-Award template forms/pages unique to each Award Program; these templates can be easily copied from previous year template as needed.

workflows, etc. specific to each Award Program.

5	Pre-Launch	OCAST user(s) publishes FOA.	System notifies all Users of FOA availability, and makes FOA document available for viewing by interested Users during specified period.
6	Application	OCAST user(s) opens Application submission period.	System: 1) notifies all Users of opening of Application submission period; 2) publishes Application pages/information.
9	Application	OCAST user(s) closes Application submission period.	System: 1) notifies all Users of closing of Application submission period; 2) prevents any new Applications from being initiated by Clients.
12	Review	OCAST user(s): 1) assigns selected Applications to an Panel Group; 2) assigns multiple External Reviewers to each Application/Application Panel Group.	System: 1) allows External Reviewer view access to assigned Application(s); 2) allows Applications to be grouped by topic and given a name to the Panel Group, and Reviewers may be assigned to these Applications by Panel Group.
14	Review	Primary Reviewer(s), External Reviewer(s), and/or OCAST: 1) completes/modifies/reviews Panel Summary Form(s); 2) labels Application decision as "Not Approved for Funding Consideration" or "Approved for Funding Consideration"; 3) provides Approved Funding Amount for each Application; 4) views all Applications, in table format, with total scores based on Panel Summary/Review Forms and approved funding, sorted in rank order (highest score to lowest); 5) decides on placement of payline in Application list.	System: 1) verifies that all required data have been included in the Panel Summary Form; 2) allows Primary Reviewers, External Reviewers, OCAST to view/modify submitted Panel Summary Forms; 3) includes scores from the two Review Forms submitted in the Panel Summary Form for each Application; 4) creates initial ranking of all applications based on these scores and display as a single table on page (table includes Amount Requested by year and total amount requested for each Application, along with a running total); 5) allows OCAST input for final ranking of all Applications and re-sorts Application order in table.
15	Review	OCAST user(s): 1) classifies selected "Approved for Funding Consideration" Applications as "Awarded"; 2) allows Clients access to Review Forms and Panel Summary Forms.	System: 1) creates final ranking of Applications classified with "Not Approved for Funding Consideration", "Approved for Funding Consideration", or "Awarded" decisions; 2) notifies all Users associated with submitted Applications of decision; 3) distributes NOA letters, additional forms and/or documents to Clients of Awarded Applications; 4) anonymizes to Clients the identities of Reviewers associated with Review Forms and Panel Summary Forms.

17	Post-Award	Client completes/submits required documentation/forms. OCAST, Contract Compliance Officer role: 1) inspects/approves submitted documentation/forms; 2) initiates Contract process; 3) drafts/modifies/saves Contract.	System: 1) verifies that all required documents/data have been submitted prior to Contract Initiation; 2) allows OCAST to perform final compliance check; 3) creates Contract document template for current year, includes budget pages and project information.
18	Post-Award	OCAST, Contract Compliance Officer role: 1) routes Contract to OCAST, Program Manager role, for Approval/Nonapproval, and concurrently; 2) routes Contract to OCAST, Accounting Manager role, for Approval/Nonapproval.	System: 1) notifies OCAST, Program Manager role, of the pending Approval decision needed for Contract; 2) notifies OCAST, Accounting Manager role, of the pending Approval decision needed for Contract; 3) notifies OCAST, Contract Compliance Officer role, of completion of these decisions.
19	Post-Award	OCAST, Contract Compliance Officer role, routes Contract to Client, Contract Official role, for Partial Signature(s).	System notifies Client, Contract Official and Administrator roles, of the pending Partial Signature action needed for Contract.
20	Post-Award	Client, Contract Official role, routes Contract to OCAST, Contract Compliance Officer role, for Final Signature. OCAST, Contract Compliance Officer role, distributes Executed Contract to Client/OCAST.	System notifies OCAST, Contract Compliance Officer role, of the pending request for Final Signature action needed for Contract.
21	Post-Award	OCAST, Contract Compliance Officer role, routes Contract to OCAST, Executive Director role, for Final Signature.	System: 1) notifies OCAST, Executive Director role, of the pending request for Final Signature action needed for Contract; 2) allows Final Signature of Contract; notifies OCAST, Contract Compliance Officer role, of completion of this action.
22	Post-Award	OCAST, Contract Compliance Officer role, routes Executed Contract to Clients, OCAST.	System: 1) notifies Client, Contract Official and Administrator roles, of executed Contract; 2) allows Client to submit RFPs, Progress Reports, Contract Modification Request Forms, as needed.
31	Post-Award	OCAST user(s) requests reports of Impact Survey data collected using various queries (previously saved or newly created).	System: 1) creates reports of Impact Survey data collected based on selected query; 2) allows export of Impact Survey data files.

From worksheet #2 Tech Requirements:

Item #	Category	Functional and Technical Requirements
1	Workflow Design and Functionality	System shall provide easily configurable and customizable user interfaces.
2	Workflow Design and Functionality	System must be highly and easily configurable by user with customizable workflows with defined event triggers, branching logic, and scripting that enable the automation of activities across all phases of the OCAST grant management lifecycle, based on a combination of complex business rules and activity data.

4	Workflow Design and Functionality	System must be capable of sending/receiving documents for digital/electronic signatures, and saving as standard pdf files.
6	Data Access, Integration and Security	System shall have the capacity to apply policies and procedures for systematically managing sensitive data among users.
7	Data Access, Integration and Security	System shall be accessible on multiple platforms (e.g. Windows, Mac, Linux, mobile devices) and browsers (e.g. Firefox, Safari, Chrome, IE).
10	Data Access, Integration and Security	System must be capable of, at minimum, interfacing with the Oracle PeopleSoft State Accounting System used by OCAST, with an OCAST User acting as intermediary agent, by exporting aggregated selected form data from multiple form instances as a single CSV file, in a compatible error-free data structure, for upload into PeopleSoft. System may be capable of interfacing or integrating with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey, Tableau and related web-based platforms.
14	Data Access, Integration and Security	System shall have the ability to fully export all data in common data formats (e.g. XLS, CSV, etc.) and all attached files upon OCAST user request.
16	Reporting, Querying and Analytics	System shall have the ability to easily create extensive and flexible reporting that enable real-time, dynamic analysis across related data objects based on simple and advanced query logic by all Users.
17	Reporting, Querying and Analytics	System shall be capable of tracking user activity, database utilization, status history, and versioning history of forms created/edited for auditing purposes.
18	Reporting, Querying and Analytics	System shall have the ability to create customizable dashboards based on selected data attributes.
19	Reporting, Querying and Analytics	System shall have the ability to view reports online and in printer-friendly format, and export to MS Office or MS Excel formats.
22	Form Design and Document Management	System shall have the ability to create customized, validated form data fields (as required or optional), with option to define default values and suggest correct spelling with text data where applicable, with the following formats: <ul style="list-style-type: none"> <li>• Yes or No (select one)</li> <li>• Number (variable decimal places)</li> <li>• Date / Time</li> <li>• Currency</li> <li>• Text (single and multiple line)</li> <li>• Check boxes (select multiple or select one)</li> <li>• Text boxes (w/ character limit option; can handle special characters)</li> <li>• Drop-down menus (select multiple or select one)</li> <li>• List box (based on lookup table or similar)</li> <li>• Scroll-down field (for multiple line text)</li> </ul>
25	Form Design and Document Management	System must be capable of multiple file uploading in various file formats, file downloading, tracking and reporting of document history, and global

searching and retrieving of documents using natural language search.

28 User Profiles and Communications

System shall have the ability to allow users to send email messages to multiple users, selected individually or as a group based on some criteria. System shall allow push notifications (due date reminders and other notifications) triggered automatically by project, form and/or workflow status.

29 User Profiles and Communications

30 Usability, Performance and Support

System shall follow currently accepted usability guidelines and website design standards for modern, usable form interface with navigation utilizing understandable language, and includes customized and searchable online documentation and training content including online tutorials, quick reference guides, context-specific help and FAQ sections.

31 Usability, Performance and Support

System must be capable of optimizing the user experience by organizing information content clearly, minimizing the number of clicks or pages to accomplish a task/workflow, standardizing task sequences, reducing the user's workload (e.g. form calculations, suggestions as you type, etc.), warning users of upcoming "time outs" and other system actions, grouping relevant navigation elements with descriptive labels and site maps/breadcrumbs, and providing descriptive form and page titles.

32 Usability, Performance and Support

System must be capable of properly printing pages and forms in a directly readable and organized format.

36 Usability, Performance and Support

Training and support documentation must be provided using terminology understandable to users.

Question 9: Please provide access to or copies of the program applications for the five grant programs managed using OKGrants.

Answer: Copies of most current grant programs (AR, HR, HF, IP, PS) are provided as pdf file attachments under "Documents" on the OMES Solicitation page.

Question 10: Does OCAST have a contract with the OKGrants vendor? What is the end date of that contract?

Answer: Yes, and the contract end date is 6/30/2019.

Question 11: How did OCAST acquire the OKGrants system? Please detail costs that OCAST has paid for the OKGrants system within the last 2 Fiscal Years.

Answer: OMES managed the bid process for the OKGrants software on behalf of multiple state agencies, among which included OCAST.

Costs OCAST paid for the OKGrants system to Agate within last 2 years:

Paid in FY2018 \$2,200.00

Paid in FY2019 \$ 300.00

FY18: Invoice #181505 Voucher #00029959 System Configuration Enhancements \$1,550.00

**System Configuration Enhancements 7/1/2017-6/30/2018**

Russell Ripley	57396	01/26/2018 08:30 AM	PT 59856
		01/26/2018 11:30 AM	
Justin McGrath	57400	01/26/2018 01:00 PM	PT 59856
		01/26/2018 04:00 PM	
Russell Ripley	57397	01/26/2018 12:30 PM	PT 59856
		01/26/2018 05:00 PM	
Russell Ripley	57398	01/29/2018 08:00 AM	PT 59856
		01/29/2018 09:00 AM	
Justin McGrath	57507	01/29/2018 02:00 PM	PT 59856
		01/29/2018 03:00 PM	
Russell Ripley	57517	01/29/2018 04:00 PM	PT 59856
		01/29/2018 05:00 PM	
Russell Ripley	57786	01/30/2018 08:00 AM	PT 59856
		01/30/2018 09:30 AM	
Justin McGrath	57789	01/30/2018 09:00 AM	PT 59856
		01/30/2018 09:30 AM	

FY18: Invoice #181970 Voucher #00030045 System Configuration Enhancements \$650

**System Configuration Enhancements 7/1/2017-6/30/2018**

Justin McGrath	58534	02/05/2018 09:00 AM	CR #1 OCAST HF-2018 Rollover
		02/05/2018 12:00 PM	
Justin McGrath	58535	02/05/2018 01:00 PM	CR #1 OCAST HF-2018 Rollover
		02/05/2018 02:00 PM	
Justin McGrath	58749	02/06/2018 03:00 PM	20180206 Push Package Errors - HR 2018 template
		02/06/2018 05:30 PM	

FY19: Invoice #186592 Voucher #000310001 System Configuration Enhancements \$200

Justin McGrath	89320	08/30/2018 01:00 PM	PT 63043
		08/30/2018 03:00 PM	

FY19: Invoice #190674 Voucher #000310001 System Configuration Enhancements \$100

Justin McGrath	114823	01/30/2019 02:30 PM	PT 65435
		01/30/2019 03:30 PM	

Question 12: What other grant management systems has OCAST reviewed prior to the release of this RFP?

Answer: OCAST has not contacted any Suppliers providing grant management system alternatives for review prior to the release of this RFP.

Question 13: Do you anticipate any required integrations?

Answer: The System must be capable of, at minimum, interfacing with the Oracle PeopleSoft State Accounting System used by OCAST, for accounting data exchange related to invoicing workflows, and would need to be active by the System by the go-live date.

The interface between the two systems would involve an OCAST User acting as intermediary agent in its simplest implementation, with the User exporting aggregated selected form data from multiple form instances as a single CSV file from the System, and subsequently upload file to PeopleSoft. However, if the Supplier, in coordination with OMES, may identify more efficient and error-reducing interface/integration options between the System and PeopleSoft, consistent with the technical and functional requirements of the System, than this may be considered a value-added benefit/cost and shall be considered in the review process; this would need to be described in the submitted Implementation Plan.

We may anticipate the need for interfacing and/or integrations with services such as Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey, Tableau and other related web-based platforms, if doing so is determined by OCAST as increasing the efficiency of OCAST grants management business processes and therefore offers substantial value-added benefit. Any Systems having potential integration capabilities with these or similar services, either at present or in the near future, may be considered a value-added benefit /cost and shall be considered in the review process.

Question 14: How many program administrators will need access to the system? Please detail full admin vs limited "read-only" user

Answer:

We request these various permission levels for OCAST users:

Role	Permission Level	User Number
OCAST-System Administrator	Full Control	2 or 3
OCAST-Programs Officer	Design	1
OCAST-Programs Manager	Approve, contribute	2 or 3
OCAST-Accounting Manager	Approve, contribute	2
OCAST-Accounting Staff	Read, limited contribute	3
OCAST-Staff	Restricted read	5-75

Note: OCAST Staff, listed in the table above, may include OCAST committee members and/or board members.

External users of the system listed below, for all programs, each user requiring a profile. Users may require role/permission changes for specific time periods and/or programs. Estimated User Number is predicted number range of users for each role needed to initially populate System for first year of operation.

Role	Permission Level	Est. User Number
EXT-Panel Chair	Approve, contribute	15-30
EXT-Primary reviewer	Read, limited contribute	80-120
EXT-External Reviewer	Restricted read	80-120

Role	Permission Level	Est. User Number
EXT-Contract Official (CO); Agency Administrator	Approve, contribute	50-150
EXT-Principal Investigator (PI); Authorized Official	Read, limited contribute	100-300



EXT-Financial officer	Read, limited contribute	50-150
EXT-Writer/contributor	Read, limited contribute	100-300
EXT-Viewer	Restricted read	50-100

Question 15: (Duplicate Question) Do you anticipate any required integrations?

Answer: See previously answered question #13.

Question 16: Is the expectation that the Worker's Comp Insurance form be included in Section 1 or as a separate attachment?

Answer: Include as a separate attachment.

Questions 17:

1. Is the expectation that the Vendor Questionnaire be included in Section 4 or as a separate attachment?
2. Is the expectation that the Vendor Payee form be included in Section 1 or as a separate attachment?
3. Is the expectation that the Implementation Plan be included in Section 4?
4. Is the expectation that the C.6 Functional and Technical Requirements be addressed as part of Section 1 or will the Use Case and Technical Proposal Requirements suffice as separate attachment?

Answers:

1. Separate attachment is preferred
2. Separate attachment is preferred
3. Separate attachment is preferred
4. The Use Case and Technical Proposal Requirements will suffice as separate attachment; any additional comments may be provided in the "Vendor Comments" column in both the #1 Use Cases and #2 – Tech Requirements worksheets.

Question 18: What is the anticipated number of internal users and external users?

Answer: See previously answered question #14.

Questions 19:

1. Have you had demonstrations and/or conversations with grants management vendors? If so, with whom?
2. Have you had any assistance in preparing this RFP? If so, from whom?
3. Has a budget been approved for this project? If so, for how much?

Answers:

1. No
2. The RFP was prepared by OCAST with assistance from OMES.
3. This information will be discussed with the awarded vendor.

Question 20: (Duplicate Question) Have you had demonstrations and/or conversations with grants management vendors? If so, with whom?

Answer: See previously answered question #19, Answer #1.

Question 21: I do not see links or documents in the response. Where can I find the copies of the most current grant programs?

Answer: Copies of most current grant programs (AR, HR, HF, IP, PS) are provided as pdf file attachments under "Documents" on the OMES Solicitation page.

Question 22: We are attempting to register for access to the Wiki for posting solicitation questions. When we follow the link in the RFP we get a message saying "Form does not exist". Could you please provide the correct link so we can register to post question?

[https://www.ok.gov/triton/modules/formbuilder/form.php?form\\_id=d432ccf8aabf5d6355bd1771fab357ca246cd410bcf1394fb7a08606bbcf627](https://www.ok.gov/triton/modules/formbuilder/form.php?form_id=d432ccf8aabf5d6355bd1771fab357ca246cd410bcf1394fb7a08606bbcf627)

Answer: Please contact Marc Brown at [marc.brown@omes.ok.gov](mailto:marc.brown@omes.ok.gov) or call the helpdesk at 405-521-2444.

Questions 23: (1-19)

1. C.4.5 - Is OCAST looking for a solution that automatically screens for application compliance during intake by applying a set of business and data validation rules?

Answer: At minimum, the System must have basic field data validation and business rules. The System must allow for Form entry fields to be made either required or optional, with proper validation and/or input masking (e.g. for dates, accounting numbers, decimals, time, spell check, word counts, etc.). The System must be able to identify missing data in required fields, return an error and prompt User to enter data, and if left unresolved, prevent the Application from moving into the Review Phase. The System must be able to calculate specific fields (e.g. for a budget), return an error if a field value violates a condition (e.g. minimum/maximum value) and trigger an additional form instance or custom message based on a field value based on a condition.

A System having additional business and data validation rule capabilities that may be able to provide increased automation capabilities in multiple workflows, in multiple formats, leading to improved compliance with additional cost effective efficiencies may be considered value-added benefits /costs and shall be evaluated in the review process.

2. C.4.6 - How many internal users (OCAST and Reviewer) will the solution support?

Answer: See previously answered question.

3. C.4.5 - Is OCAST looking for a solution that has an external portal for submitting applications, invoices and viewing contract documents?

Answer:

OCAST is seeking a Software-as-a-Solution (SaaS), or similar online platform, as a Grants Management Software System ("System") solution.

4. C.6.4.1 - Can OCAST provide a list of reports the solution needs to provide?

Answer:

The System must be able to allow Users to create reports, appropriate to User permission level, based on a User-defined query, by search term, and allow for the narrowing of searches by the following parameters (non-exhaustive):

- Program name, Application/Project name
- Application/Project year, status, phase
- Name of person, name or organization
- Invoice name, date submitted, requestor name, last modified date, status, past due 60 days, past due 90 days.
- Contract start/end dates, contract numbers, organization, PI, contract official, program name, status

- Progress report name, due date, PI name, organization, date submitted, past due date, review status, program name.
- Impact report name, due date, PI name, organization, date submitted, past due date, program name.
- Files (by kind, location within the System): research plans, documents, reports, letters, etc.
- Keywords (based on text field data)

5. C.6.2.4 - Should electronic signature be handled in a solution like DocuSign or is OCAST looking for additional electronic signature functionality to be provided directly in the proposed solution?

Answer: The eSignature can be implemented either as a separate solution (e.g. Adobe Sign, DocuSign, etc.) that can interface and/or integrate with the System solution, or as a service directly provided in the Solution, whichever offers best value while meeting System requirements. The extent to which the System solution can manage eSignatures in an efficient and cost effective manner will be considered value-added benefits /costs and shall be evaluated in the review process.

6. C.6.2.4 - Does OCAST currently own DocuSign licenses or should we include DocuSign license pricing in our proposal?

Answer: No, however we have an Adobe Sign license currently not capable for use with our grants management workflows/process. A DocuSign license pricing may be included in the proposal.

7. C.6.5.6 - What is the average total size of all documents attached to an application or contract?

Answer: Average total size of attached documents cannot be readily determined with current system. This value would be influenced by the System's capability of handling contracts as forms or as pdf file attachments (our current System does not store contract files; they are handled off line as pdf documents). Conservative estimate would be from 5MB – 75MB per application/project (each project may have 1-3 one-year contracts).

8. C.6.3.6 - Does OCAST have a middleware tool that can be leveraged for integrations?

Answer: OCAST does not have a middleware tool.

9. C.6.3.6 - Can we assume that OCAST will supply modern RESTful or soap-based web interfaces for all systems that need to be integrated?

Answer: OCAST does not have modern RESTful or soap-based web interfaces for integrating with the Oracle PeopleSoft State Accounting System.

10. General - Is single sign-on required for internal users of the solution and if so, what single sign-on provider does OCAST use (active directory, etc.)?

Answer: A single sign-on is not required for internal users of the solution.

11. General - Is OCAST open to an agile-based methodology where requirements are formatted into user stories and then delivered in 2-3 week sprints?

Answer: OCAST is open to the use of an agile-based methodological approach by the awarded Supplier for implementation only. The Supplier may describe this approach in detail in the required Implementation Plan that is submitted with the Bid.

12. C.8.1 - What is the implementation timeline? When does this solution need to be live?

Answer: See previously answered question.

13. #1 Use Cases, 5 - Is OCAST looking for a solution that collects the application data via a web form or will the applications be collected via an applicant-populated PDF document?

Answer: The System/Solution will collect application data via a web form. However, we are open to this data collected via an applicant-populated PDF document if it can be demonstrated that cost effective process efficiencies can be realized with this kind of implementation, and can be well integrated within the overall context of the grants management software system while meeting System requirements.

14. C.6.6.3 - Is the intent to send a mass email to a group of external users? If not, could OCAST elaborate on this requirement?

Answer: The System shall allow OCAST Users to manually send mass emails to selected groups of external and internal users. The System may also allow OCAST Users to automatically send mass emails to selected groups of external and internal users, based on predefined conditions/triggers (e.g. specific date, status, or action).

15. C.6.3.9 - Do these data sources represent one-time data migrations or on-going data imports?

Answer: OCAST will rely on Supplier to conduct data analysis and validation (profiling and auditing) of Source data (from current grants management system) to assist in the determination of the optimal data migration method used that minimizes interference to business operations and develop mapping specifications describing how all designated Source data will be transferred and accurately manipulated to the Target (new) System.

The current grants management software system has projects that will remain active beyond the implementation timeframe of the replacement System, so data migration will likely be a combination of a one-time migration of closed project data, along with incremental migrations of current existing project data in a phased approach. Source and Target systems will operate in parallel, with Users switching between both, until all active projects have closed on the Source system and entire data migration has completed.

16. C.6.3.9 - Does OCAST have IT personnel that will be able to assist in the data cleansing of data prior to any imports into the solution?

Answer: OCAST does not have dedicated IT personnel in-house; however, OCAST (in possible coordination with OMES-ISD and/or others) may be able to provide an individual to assist with the Supplier in preparing data for import.

17. C.6.7.7, C.8.3 - What is the preferred training method (End-User vs. Train-the-Trainer)?

Answer: The training method OCAST prefers is the train-the-trainer approach, so long as sufficient training resources are made available to OCAST by the Supplier.

18. C.6.3.6 - Could OCAST provide a list of interfaces required for each system to be integrated?

Answer: If for a User interface, the System must have an interface consistent with other similar grants management software systems and follow generally accepted design principals of software and online platforms, i.e. they incorporate a graphical user interface (GIU), menu driven navigations through form-based pages, and natural language search capability. If for a software interface, then none are available. Please see previously answered questions for additional information regarding interfacing/integration with Oracle PeopleSoft State Accounting System.

19. E.3.3, E.3.4 - Do we need to provide separate proposal and cost/price thumb drives?

Answer: Yes, the technical proposal must be in one envelope and the cost/price proposal in a separate envelope. Put on separate thumb drives. Use one envelope to mail/ship both to OMES

Question 24: We assume this only applies to contractor personnel that are performing the solution implementation services and not the Cloud Service Provider (CSP) personnel that are hosting the solution. For example, CSP engages the services of a background screening vendor to conduct background checks on employees at the time of hire. CSP also performs background investigations in certain foreign countries. The scope of these checks is subject to local laws in the jurisdictions in which the employee is hired. Can the State please modify this requirement accordingly?

Answer: No

Question 25: For PaaS/SaaS solutions, a Cloud Services Provider (CSP) would be responsible for maintaining access in terms of performance and availability to the State's data. The State's data would be owned by the State. The State would have access to its data and metadata, but not any of the PaaS/SaaS solution source code. The State would have full rights to extract their data at any time during the subscription service. However, PaaS/SaaS CSP does not typically offer system source code because it is inapplicable to software delivered as a service subscription through a multitenant architecture. While it is possible to provide the source code in an escrow account for a configured solution, the source code would only be able to operate in the CSP's PaaS/SaaS environment. Therefore, can the State remove the source code requirements?

Answer: No

Question 26: Referencing Pg. 19 C.6.7. Usability, Performance and Support C.6.7.5. (*System must be capable of completing an average of 99% of all online update transactions in under five seconds over any 60-minute period, during peak usage.*)

This can be difficult to measure and relies on other components outside of the Cloud Service Provider's control. The CSP provides a transparent display of its performance through a public website that the State will be able to access at any time during the subscription service. Therefore, will the State please remove this requirement?

Answer: No

Question 27: We respectfully request that the State provide an extension of the RFP due date.

Answer: The solicitation will be extended and that date will be in the Amendment when it is posted. The Amendment may not be posted until later this week.

Question 28: Referencing C. SOLICITATION SPECIFICATIONS, Pg. 15 C.1. Overview, Should the proposal include the integration to an existing ERP for collections/payment processing?

Answer: The proposal should include integration with the Oracle PeopleSoft State Accounting System currently used by OCAST, which is done via batch flat file transfers. No API is currently in use with the PeopleSoft system.

Question 29: We will need to ship the proposal by next Friday to meet the deadline. Do you think the Amendment will be released today or Monday? Sorry to bother you I just want to make sure any changes based off the Amendment get done in time to ship.

Answer: We are working on this and will post it soon.

Question 30: We have been monitoring the OMES website for an amendment and change in closing date for the OCAST RFP Bid Number 6280000005. When do you anticipate the release of the amendment will occur? Also do you anticipate that the closing date will be changed?

Answer: We hope to get the amendment posted soon. As for the closing date I do not know at this time.

Note: The Q&A portion of the solicitation will be extended to end on

**Revisions to the Use Case and Technical Requirements Form (Excel file)**

**Worksheet #1 – Use Cases**

Original

27	Post-Award	OCAST, Accounting Staff role: 1) reviews Request for Payment for accounting Approval; 2) processes Request for Payment for Payment; 3) requests Request for Payment data transmission to Peoplesoft for EFT Payment to Client processing; 4) classifies Request for Payment as Paid.	System: 1) verifies that all required data have been included in the Request for Payment Form and reconciles with Peoplesoft data and OCAST accounting records; 2) allows changes to be made to Request for Payment form as directed by OCAST, by OCAST and/or Client, Financial Officer role; 3) notifies Client/OCAST of Request for Payment status/action; 4) tracks Request for Payment form transactions and accounting for auditing purposes.
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Revised on 2019-03-20:

27	Post-Award	OCAST, Accounting Staff role: 1) reviews Request for Payment data for accuracy, compliance and accounting Approval; 2) processes Request for Payment for Payment; 3) downloads Request for Payment data from System, per instance or in aggregate for multiple instances from different Contracts, for export to Oracle PeopleSoft State Accounting System for EFT Payment to Client processing; 4) classifies Request for Payment as Paid.	System: 1) verifies that all required data have been included in the Request for Payment form; 2) reconciles and updates Contract accounting data for the project with no errors; 3) allows changes to be made to Request for Payment form as directed by OCAST and/or Client, Financial Officer role; 4) interfaces with Oracle PeopleSoft State Accounting System for exchange of Request for Payment form data for payment processing in PeopleSoft; 5) notifies Client/OCAST of Request for Payment status/action(s); 6) tracks Request for Payment form transactions, modifications and accounting for auditing purposes.
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**Worksheet #2 – Tech Requirements**

Original

10	Data Access, Integration and Security	System must be capable of integrating with existing PeopleSoft system. System may be capable of integrating with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey and related web-based platforms.
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Revised on 2019-03-20:

10	Data Access, Integration and Security	System must be capable of, at minimum, interfacing with the Oracle PeopleSoft State Accounting System used by OCAST, with an OCAST User acting as intermediary agent, by exporting aggregated selected form data from multiple form instances as a single batch flat file (e.g. CSV), in a compatible error-free data structure, for transfer and upload into PeopleSoft. System may be capable of interfacing or integrating with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey, Tableau and related web-based platforms.
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**Worksheet #2 – Tech Requirements**

Original

16	Reporting, Querying and Analytics	System shall have the ability to easily create extensive and flexible reporting that enable real-time, dynamic analysis across related data objects based on simple and advanced query logic.
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Revised on 2019-03-21:

16	Reporting, Querying and Analytics	System shall have the ability to easily create extensive and flexible reporting that enable real-time, dynamic analysis across related data objects based on simple and advanced query logic by all Users.
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**Worksheet #2 – Tech Requirements**

Original

4	Workflow Design and Functionality	System must be capable of sending/receiving documents for digital/electronic signatures.
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Revised on 2019-03-21:

4	Workflow Design and Functionality	System must be capable of sending/receiving documents for digital/electronic signatures, and saving as standard pdf files.
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**Revisions to the RFP****RFP, Section C.6.3.6.**

Original

C.6.3.6. System shall be capable of integrating with existing PeopleSoft system. System may be capable of integrating with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey and related web-based platforms.

Revised on 2019-03-20:

C.6.3.6. System must be capable of, at minimum, interfacing with the Oracle PeopleSoft State Accounting System used by OCAST, with an OCAST User acting as intermediary agent, by exporting aggregated selected form data from multiple form instances as a single CSV file, in a compatible error-free data structure, for upload into PeopleSoft. System may be capable of interfacing or integrating with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey, Tableau and related web-based platforms.

**RFP, Section C.6.4.1.**

Original

C.6.4.1. System shall have the ability to easily create extensive and flexible reporting that enable dynamic analysis across related data objects based on simple and advanced query logic.

Revised on 2019-03-21:

C.6.4.1. System shall have the ability to easily create extensive and flexible reporting that enable dynamic analysis across related data objects based on simple and advanced query logic by all Users.

**RFP, Section C.6.2.4.**

Original

C.6.2.4. System must be capable of sending/receiving documents for digital/electronic signatures.

Revised on 2019-03-21:

C.6.2.4. System must be capable of sending/receiving documents for digital/electronic signatures, and saving as standard pdf files.

**RFP, Section C.7.2.**

Original

C.7.2. Use Case and Technical Requirements Form

[...] Vendors must respond by selecting one of the following drop-down options under the "Vendor Response" column for all items listed in the worksheet named "#1- Use Cases" (items 1 – 31) and for all items listed in the worksheet named "#2- Tech Requirements" (items 1 – 48), and may enter responses in the "Vendor Comments" as requested and/or necessary for each item listed in both worksheets:

[...]

Revised: 3/28/2019

C.7.2. Use Case and Technical Requirements Form

[...] Vendors must respond by selecting one of the following drop-down options under the "Vendor Response" column for all items listed in the worksheet named "#1- Use Cases" (items 1 – 31) and for all items listed in the worksheet named "#2- Tech Requirements" (items 1 – 38), and may enter responses in the "Vendor Comments" as requested and/or necessary for each item listed in both worksheets:

[...]

**Appendix 2, Vendor Questionnaire, Item Number 23**

Original

What options are available to integrate your System with OCAST's PeopleSoft system? What options are available for integrating your System with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey and related web-based platforms?

Revised on 2019-03-20:

What options are available to interface and/or integrate your System with OCAST's Oracle PeopleSoft State Accounting System? What options are available for interfacing and/or integrating your System with Microsoft Office 365, Adobe Cloud Services, Google Cloud, MailChimp, Salesforce, Facebook, Twitter, YouTube, Vimeo, Survey Monkey, Tableau and related web-based platforms?

Question: Do you have an estimated timeline to release Amendment 1 to the OMES site? Will you also be extending the proposal due date since hard copies are required?

Answer: Yes, Amendment 1 is posting 3/29/2019. Yes, the Q&A portion of the RFP will be extended to 4/17/2019 at 3:00 pm CDT. The closing date has been extended to 5/8/2019 at 3:00 pm CDT. No hard copies are required. Do not send hard copies in your response.

b. All other terms and conditions remain unchanged.

\_\_\_\_\_  
Supplier Company Name (**PRINT**)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative Name (**PRINT**) Title

\_\_\_\_\_  
Authorized Representative Signature