

PROPOSAL NO. P1775.23
ADDENDUM NO. I
CITY OF HAGERSTOWN
HAGERSTOWN, MARYLAND
Customer Relationship Management (CRM) System and Grants Management System

Date: Tuesday, March 7, 2023

Bids Due: Thursday, March 16, 2023 at 2:00 PM

To Bidders:

This Addendum is hereby made a part of the Contract Documents on which all bids will be based and is issued to clarify the original documents.

Please acknowledge receipt of this Addendum at the appropriate space on the bid form by inserting its number and date. This Addendum consists of eight (8) pages. This Addendum forms a part of the contract Documents as it supplements and/or modifies as follows:

ADDENDUM I – QUESTIONS AND ANSWERS

Proposal No. P1775.23 Customer Relationship Management (CRM) System and Grants Management System

The attention to bidders submitting proposals for the above project is called to the following addendum that contains responses to all questions submitted by the prospective bidders. The items set forth herein, whether of omission, addition, substitution or clarifications are all to be included in and form part of the proposal submitted. This addendum shall take precedence or provide clarification.

All questions are sorted numerically as received from bidders and the response provided follows directly after each question submitted.

The above referenced Addendum follows.

QUESTIONS AND ANSWERS:

Q1. We deliver all services remotely. Do we need to have automotive liability insurance?

A1. No, that would not be a requirement for this contract. That is standard language included in each RFP.

Q2. MUNIS Integration: The system must be able to seamlessly integrate with the City's established Tyler MUNIS system (version MUNIS 2019.1.22.x).

MUNIS Integration (page 17) - please describe "seamlessly integrate" and what exactly do you want to integrate?

- is this a bi-directional interface?

- are we expected to move data to and or from MUNIS?

- does MUNIS have an open API and if so, please send documentation

- if the integration cannot be defined or envisioned, will you remove this requirement?

A2. Integration

- a. We would look to move data from MUNIS to the new system. MUNIS does offer API packs, but based on my conversation with IT, they may need to be part of the process in order to pull those datasets and create the packets.

Q3. Linking Data: The system must be able to accurately link individual contacts, properties, businesses, associations, and affiliations. (Pages 17,18)

- can you provide examples of affiliations for clarity?

A3. Affiliations

- a. Examples of affiliations include business relationships with different organizations. For example, someone may be affiliated with United Way, TEDCO, or some other organization.

Q4. Required Property Contact Fields: The following contact fields will be required and stored for (Page 18)

- 1 contact may own several parcels, properties, etc.

- we would use a Site or Building Object (called a Table in your document) to store this data. Each site/building will be tied to 1+ companies, contacts, etc.

- will our approach be an acceptable solution?

A4. Property Contact Fields

- a. We would need to see how the framework operates. This is one reason we request MUNIS integration to be able to have property and parcel information pulled in automatically versus manually creating thousands of individual property datasets.

Q5. Grants Management System - Page 19

A. Applicant Portal

- can you provide descriptions of each program, how they work, their objectives, reporting requirements and how they are associated with Funding Organizations (ie the organizations that require reports)?

A5. Grants Portal – Information on Grants

- a. All of our Invest Hagerstown Grants and the PEP program are included in the below link, along with their guidelines and application forms. We would be looking at converting a currently manual process into a digital application that handles the intake of data fields and supplemental documents.
 - i. <https://www.hagerstownmd.org/788/Incentives-for-Businesses>
- b. We would also look to be able to pull information from these such as investment numbers, # of jobs created, # of apartments created/renovated, etc.
- c. Reporting criteria would be internal and for MCC updates, with potential growth in the future to include our CDBG programs and their required reporting structures with HUD/DHCD.

Q6. B. Staff Dashboard - Page 19

- please describe the tracking deliverables for 2 customized incentive agreements. We understand and can likely manage this however, we must see the data to accurately respond.

A6. Staff Dashboard – Customized Incentive Programs

- a. Example of tracking of deliverables include the ability to create a customized incentive outline/sub-category which will allow us to administer incentives that do not fit neatly into our traditional and statutory programs listed above.
- b. We would be looking to have the ability to track current, upcoming, and future deadlines/delivery dates to stay on top of projects and ensure there are no delays.
- c. We would also seek a “tickler” feature in this regard as outlined in the RFP.

Q7. G. Data Comparison - Page 20

- can you show or provide an example of the financial data that will be compared year over year?

A7. Data Comparison

- a. Same information as earlier regarding reporting data: investment numbers, # of jobs created, # of apartments created/renovated, etc.

Q8. I. Logged Applications - Page 20.

- do you have an excel document that we can import so that the prior applications can connect to the contact and property? If yes, we must see the file with header rows and actual / or sample data for all fields

A8. Logged Applications

- a. This can be created depending on the chosen system's required formats.

Q9. Required General Features

F. Standard Reports

Query Report - do you want a report on the queries made by users?

A9. Query Report

- a. No, we would not require a report to generate what users have searched for in the past, but rather the ability to generate a report based off an individual's query search.
- b. For example – If someone were to search for "Potomac", records with this keyword will populate.

Q10. G. Import/Custom Reports

- to be clear, you want to run a report in MUNIS, then import the data (not the report) into the new system? Once the data is in, then you'd like to create a report (based on the MUNIS data). Can you provide examples?

- the new application must have a place for the MUNIS data to "land" - ie. custom MUNIS fields must either exist or be created in order for this to function.

A10. Imported/Custom Reports

- a. This section refers to reports that we may pull from MUNIS or other systems and be able to import the data into the chosen system. Most will likely be under the form of an API packet or CSV file.
- b. An example of this would include property data and if/when a property transfers ownership.

Q11. H. Security - will Single Sign On suffice? That is what we will provide for security.

A11. Single Sign On

- a. This question will be answered via Addendum II

Q12. I. Metadata - we can pull data in via API Integrations, Zapier, or manually via excel. Will this answer suffice as meeting the criteria?

A12. Metadata

- a. If the system is able to pull and upload data via API and CSV files, this should suffice.

Q13. J. Conditional Logic - can you provide an example? Are you describing a dynamic form where a choice in question one then dynamically generates the following series of questions based on choices?

A13. Conditional Logic

- a. The example provided is correct. This would be to either provide a follow up question, or bypass it, based on the answers in an earlier field.
- b. Example – "Is your business located in the City of Hagerstown: Y/N" – A "N/No" response would populate red text advising that they are not eligible for our municipal programs.

Q14. K. Signature Capture - this is a third party integration - what signature capture technologies do you use today?

A14. Signature Capture

- a. We do not currently use a digital signature technology today other than Adobe PDF if an applicant fills out their forms online versus paper/pen.
- b. We need some form of digital capture of a signature which can be a third party integration, or a self-certification checkbox with the applicant entering their name to attest and certify the information provided in their application is true/correct.

Q15. How many people will use this software in total?

A15. Number of Users

- a. Up to 10 or so, but this may depend on the pricing structure of the applicant

Q16. Whether companies from Outside USA can apply for this?

(like, from India or Canada)

A16. No, only companies from the USA can apply

Q17. Whether we need to come over there for meetings?

A17. As this is a database and document portal, contractors would likely not need to work on site unless they are needing to set up hardware.

Q18. Can we perform the tasks (related to RFP) outside USA?

(like, from India or Canada)

A18. No, all work must be performed in the USA

Q19. Can we submit the proposals via email?

A19. No, proposals must be submitted via the Dropbox link provided in the bid document

Q20. Reference Page 22 of RFP, “7. Operating System & Database: Software must be compatible with Microsoft Windows Server and Microsoft SQL Server.”

Question#1: Is the program office looking for only on-premise solutions? Or would the program office be open to cloud-based software as a service (SaaS) grant management solutions?

A20. The RFP does mention cloud-based application of the portal. The Microsoft operating system is making sure there won't be any compatibility issues.

Q21. RFP Reference Page 17 – (Question #1) Please provide additional information on the MUNIS Integration. Does the City seek need to access the new solution via the MUNIS user interface / user experience.

A21. The system must be able to seamlessly integrate with the City's established Tyler MUNIS system.

Q22. RFP Reference Page 20 – (Question #2) Is the City seeking a cloud-based solution, i.e., SaaS offering, to which the City does not have to invest in hardware, servers, and infrastructure.

A22. As mentioned in the RFP, we are looking for a cloud based solution. So long as we don't need specific hardware in order to operate it (such as switching out all of our PCs for Macs), most developers should be fine with this requirement as it would otherwise be nonapplicable to their system.

Q23. RFP Reference Page 21 Requirement G – (Question #3) What does the City mean by the application must provide the ability to import reports generated using MUNIS? Our solution provides the ability to produce standard and ad-hoc reports can be provisioned or stored in MUNIS. Is this sufficient?

A23. MUNIS- Are you stating that they export TO MUNIS and do not import data FROM it? If so, this will not meet our requirements.

Q24. RFP Reference Page 22 Requirement 4 – (Question #4) Our solution is a cloud-based SaaS offering to which the City does not need to invest in hardware or infrastructure. Can this requirement be removed?

A24. As mentioned in the RFP, we are looking for a cloud based solution. So long as we don't need specific hardware in order to operate it (such as switching out all of our PCs for Macs), most developers should be fine with this requirement as it would otherwise be nonapplicable to their system.

Q25. RFP Reference Page 22 Requirement 7 – (Question #5) Can this requirement be removed? Our solution is a SaaS offering to which the City does not need to invest in operating systems and databases.

A25. The Microsoft operating system is making sure there won't be any compatibility issues.

Q26. For cost estimates, we need to know anticipated how many internal users (city employees) and external (applicant users) will be using the system actively at a particular point. Any estimates in this regard will be helpful.

A26. Depending on the pricing, may vary from 1-2 to 10-13 internal staff users, and an unknown amount of external; especially as not every user that registers may submit an application.

Q27. Does the City need to migrate data from legacy systems to the new platform?

A27. We do have a legacy application, and will be discussing this as we get closer to the award. This system is able to export data via CSV file, which should be able to be uploaded into the new software per the RFP requirements.

Q28. How many internal users that will be using the system more than 30 hours per month and how many internal users will use the system less than 30 hours per month

A28. Internal users over 30hours/week would likely be 2-3. Less than 30hours/week would be around 5-10.

Q29. How many external users (grantees) will access the new platform?

A29. External users, we can't benchmark this as it depends on overall program interest, and which projects are able to move forward versus those that may start and not finish the process.

Q30. How many users will there be for the Grants Management Solution?

A30. Internal users over 30hours/week would likely be 2-3. Less than 30hours/week would be around 5-10; External users, we can't benchmark this as it depends on overall program interest, and which projects are able to move forward versus those that may start and not finish the process.

Q31. What is the City's estimated start date?

A31. The start date will be shortly after awarding the winning bid.

Q32. How many internal users will use the system? Of those, how many will use it for more than 40 hours per month?

A32. Depending on the pricing, may vary from 1-2 to 10-13 internal staff users

Q33. How many external users (e.g., applicants, external reviewers) will use the system?

A33. Unfortunately, we would be unable to confirm the amount of external users, especially a not every user that registers may submit an application, but I would estimate no more than 75/year

Q34. What is your preferred hosting option (public vs. private cloud)?

A34. Private Cloud

Q35. It's rare that you see a full-blown CRM and Grant Management System combined into one solution and/or RFP. Although we have some CRM features that are related to grant management, we commonly see solutions that are strong in either CRM or Grant Management, not both. QUESTION: Would the City be open to receiving proposals that are Grant Management focused only?

A35. We are willing to entertain proposals for each individual, but would prefer applications that include a package of these systems.

Q36. Metadata: System will have the ability to pull from multiple data aggregators such as Tax records, Maryland SDAT, City ARCGIS, etc. QUESTION: Would the city be open to a data import into the software and updating that data on a regular basis versus a direct connection (API) to those data sources?

A36. This would be a manual process. While we are not opposed to this, a direct API connection would automate the process and require less employee hours dedicated to this process.

Q37. Importing: The application must have an import utility that allows records to be imported from one or more different outside data sources. QUESTION: Would the city be open to the vendor providing the import services or is the requirement that the system must have the capability of city staff completing the import, aligning data fields within the database?

A37. While we are not opposed to this, automation of the process is preferred as this would require less employee hours dedicated to this process.

Q38. QUESTION: how many users (administrative licenses) are needed to access and maintain the system?

A38. Depending on the pricing, may vary from 1-2 to 10-13 internal staff users

Q39. QUESTION: what are the funding sources for the 8 programs listed in Grants Management System; A. Applicant Portal?

A39. These are primarily City appropriated funds, not coming from another source of funding. Exceptions of this include State-pass through funding such as our Fire Suppression System Grant that utilizes a reimbursement funding source from the State's Strategic Demolition Fund.

Q40. What is the desired start date?

A40. April 2023

Q41. What is the desired completion date?

A41. June 2023

Q42. What is the project budget for implementation?

A42. We do not have a set budget at this time

Q43. What is the budget for software licensing?

A43. Is this referring to the annual cost after implementation?

Q44. For the proposal, is a time and materials estimate acceptable?

A44. We would envision this would be rolled into the overall projected cost of the estimate, not separated.

Q45. Are offshore resources permitted under this engagement? Are there any specific requirements for staffing? How many internal users will require system access?

A45. Outsourcing is not permitted.

Q46. How many external users will require access?

A46. Estimated to be no more than 75/year

Q47. Does the city plan on moving additional departments to the CRM after the successful launch of the DCED CRM?

A47. This RFP is solely for the Department of Community & Economic Department (DCED) at this time. If other Departments choose to sign on or open their own RFPs, those would be at a separate time.

Q48. For the MUNIS integration, can more details be provided around the type of integration be shared? (ex. SSO, Two way data sync, etc)?

A48. One way data extraction and updating of the database.

Q49. Will the new CRM be the system of record for the City or will new individuals be created in a different system and pushed to the CRM?

A49. The CRM would be a system of record, where staff will add entries ad hoc.

Q50. For the application portal, is the application process (not the required questions) the same for all applications or are they different depending on the application type?

A50. Each grant application has different questions as they pertain to the individual opportunity. Some questions and required documentation may overlap with one another.

Q51. Is it required for an applicant to be able to start an application, save, and return later to complete the application?

A51. While not necessarily required, this would be something nice to have for our applicants.

Q52. Once the application is submitted by the applicant does the submission need to alert specific staff members or the department as a whole? If a specific staff member or collection rather than the entire department is this alerted members different for each application type?

A52. We can set this up to alert the individual staff member, or filter it to our general Department intake for processing. The former would be preferred.

Q53. For the Progress Status, will staff be changing the status at the end of each step or is the idea that this is automated?

A53. The idea is that this would be automated, with some manual changes occurring if we need to kick an application back into review or other status.

Q54. How many end users will require training? How many will require administrator training?

A54. Administrator Training – 2-3, Staff Training – possibly one. We can perform some training on our side.

Q55. Will Training be held virtually or on site?

A55. This would depend on the winning bid/system and what may be most feasible.

Q56. What type of integration is needed between the City's CMS and the CRM?

A56. We would need clarification on what they are referring to on CMS.

Q57. The general contract conditions indicate that the bids shall be submitted only on the forms provided. Is there a specific format requested for the bids or may the bidders provide their narrative proposal and pricing as they see fit?

A57. Pages 24-29 of the RFP document have to be submitted but bidders may provide their narrative and pricing proposals as they wish.

Q58. Must pricing be presented separately from the narrative bid document?

A58. No, that is not required

Q59. Are you looking for any Turn Key software solutions

A59. The software solution would have to fit our RFP needs.

Q60. Do we have any MBE or WOBEN reservations for this RFP

A60. No, there aren't any MBE or WOBEN reservations for this RFP

Q61. Can we do any COTS production solution and customize based on the requirements

A61. We can review any off-the-shelf product that is submitted to us, but we will need to see how those will work with our RFP requirements.

Q62. Is there any restrictions on developing this solution with both onshore and offshore delivery model

A62. Outsourcing is not permitted

Q63. For the past performance if the entity is formed in 2022 can participate based on their extensive industry and solution experience

A63. We will review any current and former experience and knowledge on the RFP. A brand new professional out of college could submit their application, but we will review it for their ability to meet our requirements.

Q64. Do we have requirements is the contractors need to work from onsite

A64. As this is a database and document portal, contractors would likely not need to work on site unless they are needing to set up hardware.

Q65. Do we have any separate expense budget for travel or meetings to customer location

A65. We would need to understand what the travel needs would encompass.

Q66. Currently how many applications we receive annually

A66. These vary, especially by the individual programs under the Invest Hagerstown program. We can anticipate up to 75 applicants per year at this time.

Q67. Do we have any criteria for keeping all the applicants to be active after applying for grants

A67. We would prefer the ability for applicants to be able to log in and view any of their previously submitted applications, as well as create new applications as needed.

Q68. Do we have any numbers on how many internal (City employees) who will be accessing the application in terms of reviews and reports

A68. Between 2-10 users.

Q69. Do we have any specific number of users estimated to whom we are targeting this system for

A69. Please see answers for this question above

Q70. Does the solution provider expected to include the cost of infrastructure (if it is a cloud based solution).

A70. As mentioned in the RFP, any cost of infrastructure should be listed in the RFP application.

Q71. Do we have to include the cost for the maintenance period ie base + options. If so how many options period do we have.

A71. Yes, maintenance and any yearly expenses should be listed so we can budget accordingly.

Q72. What kind of support we are looking into - 5x8 (all working days and 8 hours during Eastern zone) or 24x7x365. Any other additional information on this will be helpful

A72. Any support would be during our normal business hours as needed. We would not need 24x7x365 coverage for IT support.

Q73. How many companies have solicited the RFP so far?

A73. As of today there have been seventy (70) downloads of the RFP document.

Tyler French, Procurement Administrator
City of Hagerstown