



North Carolina Department of Public Safety

Purchasing and Logistics

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Purchasing & Logistics

IMPORTANT PROPOSAL ADDENDUM

March 12, 2019

FAILURE TO RETURN THIS ADDENDUM IN ACCORDANCE WITH INSTRUCTIONS MAY SUBJECT YOUR PROPOSAL TO REJECTION ON THE AFFECTED ITEM(S):

PROPOSAL Number: 19-RFP-014530-WAX

COMMODITY/SERVICE: Salesforce System of Record Management Services

ADDENDUM Number: 02

USING AGENCY: NC Office of Recovery & Resiliency

PURCHASER: Angela Wainright

OPENING DATE/TIME: March 25, 2019

INSTRUCTIONS:

1. Below are the responses to questions submitted by Vendors:

Questions	Answers
1. Whether companies from Outside USA can apply for this? (like, from India or Canada)	Vendors that meet the requirements of this RFP may submit responses to this proposal
2. Whether we need to come over there for meetings?	Per Section VI. 11) Meetings <i>Face to face meetings are desired.</i>
3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	See Section VI. 1) Vendor Utilization of Workers Outside the U.S. <i>The State of North Carolina will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award for any such Vendor's offer</i>
4. Can we submit the proposals via email?	No. Per Section D Instructions For Offer <i>Offers submitted electronically or via FAX will not be accepted.</i>
5. We are interested to submit the response on Salesforce System of Record Management Services RFP released by NCORR. I would like to know can international bidder submit a response for the same?	Please see answer to question #1.

MAILING ADDRESS:
4227 Mail Service Center
Raleigh, NC 27699-4200
www.ncdps.gov



OFFICE LOCATION:
3030 Hammond Business Place
Raleigh, NC 27603-3666
Telephone (919) 743-8141
Fax (919) 715-3731

<p>6. The RFP indicates that many elements of the Salesforce system have already been developed. To assess what has/hasn't been developed in the existing system, will the State:</p> <ul style="list-style-type: none"> • Provide access to the current system's sandbox so that proposers can explore its current status and functionality? • Provide access to the existing training modules? 	<p>No system access will be provided. The state hosted an optional pre-bid meeting to display the salesforce buildouts already complete.</p>
<p>7. If the event development of the Salesforce-based system of record is ongoing, is there a potential conflict that would prohibit the selected vendor from pursuing other CDBG-DR opportunities with the State?</p>	<p>No, NCORR does not see any potential conflicts at this time.</p>
<p>8. Will you please provide a list of the (in-person and telephone) attendees at the March 5 pre-bid meeting?</p>	<p><u>Telephone Attendees:</u> CGI; Publicis Sapiant; Intellibee, Inc. <u>In-Person Attendees:</u> Horne LLP; Publicis Sapiant; Winsor Consulting Group; Professional Steward Services; Intellibee; IFC International; CGI; JMB Preservation Advisors</p>
<p>9. Are you willing to utilize any SAAS prebuilt product along with Salesforce?</p>	<p>See RFP section IV. B1 (page 14).</p>
<p>10. Which part of the "project and application tracking system" can be leveraged for further implementation?</p>	<p>NCORR may consider proposals that will make the system of record more efficient and effective for all users</p>
<p>11. How many licences/users are there in the Salesforce system and the licence type?</p>	<p>The state currently has 155 Lightning Force and 50 community access licenses. We expect to expand the number of licenses with future grant awards.</p>
<p>12. Which system are you using Data warehousing?</p>	<p>Amazon AWS.</p>
<p>13. What are the managed packages currently installed in your system?</p>	<p>NCORR does not have sufficient information to provide an accurate answer.</p>
<p>14. Section 2, C. Summary scope of work. Page 4- Is there an existing data warehouse that requires migration into Salesforce? If so, what is currently being used?</p>	<p>See response to question 12.</p>
<p>15. Section 2, C. Summary scope of work. Page 4 - What type of Training is currently provided for NCORR? (Class room, virtual, videos, etc.) Does NCORR have an existing Learning Management System?</p>	<p>The current training plan only includes "in person" classroom training and telephonic assistance.</p>
<p>16. Section 2, C. Summary scope of work. Page 4- Are any of the application work-flows currently supporting existing applications? If so, what are those systems and technologies?</p>	<p>The applicant intake module and construction management module directly support existing and future applications.</p>

<p>17. Section 2, C. Summary scope of work. Page 4 - What is the reporting structure for this contract? Will the selected vendor only report to the State Contract Manager or other state employees as well?</p>	<p>Vendor will report to NCORR for implementation and negotiate amendments with the client and State Contract Manager.</p>
<p>18. The RFP doesn't indicate an estimated budget or vendor cost to-date, nor was this discussed during the pre-bid meeting. What cost has the State estimated for developing their system of record during the initial contract year of this contract?</p>	<p>Vendor will determine their costs required to meet the State's Request For Proposal and present as part of the Vendor's proposal. See Section III (page 10).</p>
<p>19. Are there any restrictions preventing one firm being proposed as a subcontractor to multiple different Prime Contractors?</p>	<p>NCORR will evaluate all responsive responses to the RFP.</p>
<p>20. Can a Respondent submit a proposal as the Prime Contractor and also be included in a separate proposal as a subcontractor?</p>	<p>See response to question 19.</p>
<p>21. Are there any restrictions to the use of key staff in multiple separate proposals?</p>	<p>See response to question 19.</p>
<p>22. Section A, Introduction, page 3 - How many internal users does the solution support?</p>	<p>See response to question 11.</p>
<p>23. Section A, Introduction, page 3 - Could the State provide a list of the different types of internal users and their roles?</p>	<p>See response to question 11.</p>
<p>24. Section B, Agency Background, page 3 - How many applications and grants per year does the State currently manage?</p>	<p>There are currently 3100 applications in the system under a single grant. NCORR expects two more grants this year with additional applications anticipated.</p>
<p>25. Section A, Introduction, page 3 - Does the solution have a Salesforce Community portal and if so, how many external users does the solution support?</p>	<p>No, the system does not currently have this functionality, but responses building out these capabilities for future grants will be evaluated.</p>
<p>26. Section A, Introduction, page 3 - Are there any third-party solutions being leveraged within the solution currently besides native Salesforce functionality (document generation, e-signature, data backup solutions)?</p>	<p>See response to question 13.</p>
<p>27. Section A, Introduction, page 3 - Are there any integration requirements that the solution should meet? If so, does the State have a middleware tool that is leveraged?</p>	<p>See response to question 13.</p>
<p>28. Section A, Introduction, page 3 - Is single sign-on being leveraged with the Salesforce solution currently?</p>	<p>See response to question 13.</p>
<p>29. Section C. Summary of Scope of Work / Business Objectives, 1., page 3 - Does the vendor need to provide helpdesk support for all internal and external users?</p>	<p>Yes.</p>

<p>30. D. Business and Technical Specifications, #13, page 9 - Does the State have a defined cadence for delivering requirements to the Vendor?</p>	<p>NCORR will work with the awarded vendor to provide guidance within the weekly conference meetings.</p>
<p>31. D. Business and Technical Specifications, #13, page 9 -Is the State open to an agile-based methodology where requirements are formatted into user stories and then delivered in 2-3 week sprints?</p>	<p>NCORR will evaluate Vendor proposals that meet RFP requirements.</p>
<p>32. D. Business and Technical Specifications, #13, page 9 -Will the State be providing a product owner who will own the backlog of requirements and be the liaison between the Vendor and the business groups to help clarify requirements?</p>	<p>See response to question 17.</p>
<p>33. Section C. Summary of Scope of Work / Business Objectives, 1., page 3 - Will the State be responsible for user acceptance testing and work with the Vendor to provide testing feedback?</p>	<p>NCORR will work with awarded vendor to perform system tests.</p>
<p>34. Section C. Summary of Scope of Work / Business Objectives, 1., page 3 - Is the State's preference to have full-time on-site resources or can we propose a blended team that has some members being remote?</p>	<p>Either solution would meet NCORR's needs.</p>
<p>35. Section C. Summary of Scope of Work / Business Objectives, 1., page 3 - Does the State have IT personnel that will be able to assist in the data cleansing of data prior to any imports into the solution?</p>	<p>No.</p>
<p>36. D. Business and Technical Specifications, #11, page 8 - Will the State need the Vendor to create and maintain a knowledge base and make it available to end-users?</p>	<p>Yes.</p>
<p>37. D. Business and Technical Specifications, #14, page 9 - Is the State's preference to award to a Vendor that is a Salesforce partner with resources that hold Salesforce certifications?</p>	<p>NCORR will consider all proposals that have the experience to function within the Salesforce operating environment.</p>
<p>38. D. Business and Technical Specifications, #15, page 9 -What is the preferred training method (End-User vs. Train-the-Trainer)?</p>	<p>NCORR prefers the capability for end-user training.</p>
<p>39. D. Business and Technical Specifications, #15, page 9 -How many departments will require training?</p>	<p>All NCORR employees and contractors will require salesforce training as per the response to question 11.</p>
<p>40. Payment Schedule and Invoices, page 13- Could the State describe how will deliverables be defined for this contract? If a deliverable takes more than one month to complete will NCORR withhold payment for that month for all resources?</p>	<p>Vendor to invoice monthly and invoices shall be subject to acceptance. Standard monthly metrics of the deliverables of this contract are to be mutually agreed upon prior to the effective date of the contract upon which a retainage cost of up to twenty percent (20%) may be withheld from the monthly bill until the</p>

	<p>deliverable is completed and accepted by NCORR.</p>
<p>41. Page 8, Section D, Specification Number 9. a. "Provide general Salesforce system support for system-wide updates due to additional natural disasters and policy and procedure changes."</p> <p>Page 10, III. Cost of Vendor's Offer, 1) Offer Costs States "Pricing shall account for the development of all modules required in the Specifications Section above within Year One of any contract. Any subsequent optional years should be devoted to modifications to the modules, maintenance of the system of record, and ongoing support and training" - It appears these two requirements could be problematic. The Citation on Page 8 appears to ask the vendor to provide updates due to additional natural disasters or policy and procedure changes. While, the citation on Page 10 is that the Optional Years after Year 1 Deployment are for maintenance of existing modules. The recent history of CDBG-DR has seen significant changes to implementation rules year over year and it is expected that those changes will continue. The Concern is if there are additional natural disasters or changes to CDBG-DR rules, action plans, HUD Guidance, state rules, policies and procedures or program vendors that major system changes/training/support may be needed. Are the Optional Years 2-6 intended to provide major system changes/training/support is needed due to program changes or is it acceptable to provide an alternate proposal for Optional Years 2-6 for scenario where major system changes/training/support are needed due to program changes?</p>	<p>NCORR does not anticipate significant Salesforce buildout or modifications after year 1. Future events resulting in additional grants may require issuance of an amendment.</p>
<p>42. Can the State provide the list of vendors in attendance during the pre-bid meeting?</p>	<p>See response to question #8</p>
<p>43. What is the vendor's role in managing the Amazon AWS services?</p>	<p>Amazon AWS provides the document file library for the Salesforce platform. Vendor will have to manage both platforms to maintain an operational system.</p>
<p>44. Page 9, Section D, Specification Number 17. "The State has obtained all necessary licensing for the system. It will be the Vendor's responsibility to obtain and maintain software, licenses, or other tools/equipment as needed to provide work product deliverables and services in a manner that</p>	<p>NCORR shall purchase all necessary Salesforce User licenses. Vendor shall manage the distribution of user licenses and will coordinate with NCORR when additional user licenses need to be purchased. As for additional tools and</p>

<p>meets the capacity and needs of the State.” - Can the state provide further clarification on this requirement? It appears to state that the state has existing licenses and will provide additional licenses for the licensing needing to operate the system. This would be inclusive of all Salesforce Licenses, Apex or other plug-in licenses, Amazon AWS, etc. It appears the vendor will provide their own tools/computers and software needed to perform system development?</p>	<p>equipment needed by the vendor to perform the scope of work see page 37, 3.A.</p>
<p>45. Page 9, Section D, Specification Number 11. d. “Provide weekly onsite support for State staff in the Raleigh, NC area. Prior to performing onsite work, the Vendor shall be responsible for submitting all logistics requests regarding the onsite visit, including but not limited to office space, desks, telephones, network connections, parking, and phones to the State Contract Manager for approval. The Vendor shall be responsible for providing both on-site and remote logistics planning. - Can the state provide further clarification on this requirement for Optional Years 2-6. It appears that the state is requesting weekly onsite support staff for years 2-6?</p>	<p>NCORR will require onsite support for year one of the contract and will work with the vendor to determine onsite requirements in optional years.</p>
<p>46. Section 1.A., Page 2 - The State seeks to procure development, support and training for the State's CDBG-DR Salesforce-based system of record (RFP Section I.A). Will the State continue its existing Salesforce subscription/licenses to support the CDBG-DR system through the term of the contract resulting from the RFP?</p>	<p>Yes.</p>
<p>47. Section 1.A., Page 2 - What Salesforce licenses types (i.e. Lightning Enterprise) and what quantities does the state currently own? What is the planned purchase for types and quantities?</p>	<p>See response to question 11.</p>
<p>48. Section 1.A., Page 2 - What expectations are there on mobile device support for Salesforce?</p>	<p>See response to question 10.</p>
<p>49. Section 1.A., Page 2 - How is the current Salesforce environment meeting the Statewide Data Class Handling – High Risk requirements for both encryption-at-rest and audit trails for all data access and destruction?</p>	<p>NCORR does not have sufficient information to accurately answer this question.</p>
<p>50. Section 1.A., Page 2 - Is the current Salesforce implementation a single org or multi-org (instance)? Is there a requirement for different modules to run on different orgs?</p>	<p>NCORR does not have sufficient information to accurately answer this question.</p>
<p>51. Section I.B., Page 3 - The RFP states that, "This RFP is not specific to any particular disaster or disasters but is intended to support the Salesforce</p>	<p>This RFP is issued by the North Carolina Office of Recovery and Resiliency (NCORR). The State of North Carolina</p>

<p>system for any major disasters prior to or during the Contract term." Can the State detail which prior disasters are currently being managed within the system, or are planned to be managed within the system?</p>	<p>(the State) has received approximately \$236.5 million from the U.S. Department of Housing and Urban Development (HUD) in Community Development Block Grant-Disaster Recovery (CDBG-DR) awards to date for Hurricane Matthew (DR-4285). The State anticipates an additional \$168 million for mitigation projects, and, following Hurricane Florence (DR-4393), North Carolina anticipates another substantial CDBGDR award from HUD.</p>
<p>52. Section I.C.2., Page 4 - The RFP states that, "this procurement is to seek a qualified Vendor(s) to: ...Create, maintain and support a data warehouse where other State Contractors and Departments will enter all the fiscal, program, and performance data required for the State's system of record for disaster recovery." Is the described data warehouse intended to be contained within the Salesforce instance or separate from it?</p>	<p>NCORR data warehouses or file library resides on the Amazon AWS platform.</p>
<p>53. Section I.C.2., Page 4 - With what other state systems, if any, will the solution require integration? If integration is required, is there currently an ETL or Middleware platform in place that would need to be leveraged?</p>	<p>Information listed at page 8, paragraph 9.c. is currently manually imported into the Salesforce system via access or excel files.</p>
<p>54. Section I.C.2., Page 4 - Will data need to be migrated from existing sources, such as spreadsheets or current applications, to the new solution modules in Salesforce?</p>	<p>See response to question 53.</p>
<p>55. Section II.B.2, Page 6 - For the NIST readiness, can you confirm that the current Salesforce implementation is already NIST compliant?</p>	<p>NCORR does not have sufficient information to accurately answer this question.</p>
<p>56. Section II.B.2, Page 6 - Can you confirm that the state does anticipate upgrading to FedRamp cloud for Salesforce?</p>	<p>Yes</p>
<p>57. Section II.D.2, Page 7 - Is there an existing schedule for the state of the order these need to be updated/created?</p>	<p>Upon award, NCORR will coordinate with the vendor on the priorities.</p>
<p>58. Section II.D.2, Page 7 - In this section the RFP mentions specifications for modules to be built or supported for each of the programs being/to be executed by the State. Can the State please define the dates or anticipated dates in which the application process for each of these programs will be open/active?</p>	<p>See response to question 57.</p>
<p>59. Section II.D.9.b.4, Page 8 - The RFP states that, "Limited system interface may be needed or</p>	<p>Currently, there are no interfaces with other State systems.</p>

<p>developed to align with State financial management and grants reporting functions held in other discreet secure systems. The goal is to provide effective application and project status that both informs program budgeting priorities and reflects obligation and expenditure of projects." Can the State please define the other systems which the State currently knows that they may want the system to interface with, and the purpose of each system/interface?</p>	
<p>60. Section II.D.9.b.4, Page 8 - The RFP states, "State system users with designated levels of reporting access should be able to automatically generate all reports in the system at any given time." Are all reports defined by this specification to be developed and housed within the Salesforce environment or may vendors propose the use of other tools to support this specification?</p>	<p>See response to question 10.</p>
<p>61. Section II.D.9.c, Page 8 - The RFP defines a specification to, "Coordinate with other disaster recovery program and data-set managers (e.g., NFIP, FEMA IA, FEMA HMGP, SBA, private insurance) to import data into the Salesforce system" Does the State already have data sharing agreements in place with these organizations?</p>	<p>See response to question 58.</p>
<p>62. Section II.D.11.b, Page 9 - Can you clarify the technical support expectations of Salesforce related issues (i.e. a cloud outage) versus support for the specific development items from the vendor in the 4 hour window?</p>	<p>The 4-hour response time is for most requests for routine system updates and support user technical needs. NCORR expects to be able to coordinate with vendor for timely fixes to more complicated issues.</p>
<p>63. Section II.D.11.d, Page 9 - As long as part of the team is in Raleigh providing on-site support, is it acceptable for other parts of the team to be distributed?</p>	<p>Yes – this is acceptable.</p>
<p>64. Section II.D.14, Page 9 - Is this request for resumes for all staff that may be staffed - or key personnel?</p>	<p>All proposed staff.</p>
<p>65. Section II.D.17, Page 9 - The RFP states, "It will be the Vendor's responsibility to obtain and maintain software, licenses, or other tools/equipment as needed to provide work product deliverables and services in a manner that meets the capacity and needs of the State." Additionally, in Section III.1, the RFP states, "The Vendor shall incorporate in the offered hourly rates any potential travel, living, equipment/device, or overhead costs." Does the combination of these statements intend for Vendors to incorporate the</p>	<p>No. The State's License responsibility will be for the procurement of the Salesforce Licenses. All other licenses and/or software necessary to complete the scope of work should be integrated into the hourly rates provided in the Vendor's offer.</p>

<p>cost of tools and/or software outside of the Salesforce licenses purchased by the State into their proposed hourly rates? As it is often the case that the State is able to obtain more favorable licensing agreements for such tools and/or software, will the State consider allowing for proposals that detail these costs separately from proposed hourly rates for staff?</p>	
<p>66. Section III.2, Page 13 - The RFP states, "Vendor to invoice monthly and invoices shall be subject to acceptance." and also states, "Invoices shall be submitted to the NCORR Project Manager and should contain pertinent Deliverable Acceptance forms to authorize payment." Given that vendors are likely to be expending effort towards the development and maintenance of multiple deliverables simultaneously, it is likely that within a given month effort will be expended towards a deliverable that will not be completed within that month. Additionally, beyond the first year of the proposed contract, it is stated that the optional years will be largely devoted to the maintenance of the system. The language between monthly invoices and the deliverable acceptance forms seem to contradict - can you please provide clarity?</p>	<p>Vendor to invoice monthly and invoices shall be subject to acceptance. Standard monthly metrics of the deliverables of this contract are to be mutually agreed upon prior to the effective date of the contract upon which a retainage cost of up to twenty percent (20%) may be withheld from the monthly bill until the deliverable is completed and accepted by NCORR.</p>
<p>67. General/Pre-Bid Conference - It was noted in the pre-bidder conference that there was a need for data/document retention for 5 years beyond closeout. Given that terms of this RFP are for up to 6 years, does the State envision that a solution for this data retention period be described and priced in RFP responses?</p>	<p>The state shall retain data beyond closeout. The vendor may assist the state in data migration.</p>
<p>68. General/Pre-Bid Conference - It was noted in the pre-bidder conference that Haggerty Consulting was the vendor assisting the State in developing the current Salesforce implementation, if this is correct, are they or another other firms precluded from bidding on this RFP?</p>	<p>No, all responsive responses will be evaluated.</p>
<p>69. General/Pre-Bid Conference - It was noted in the pre-bidder conference that Amazon Web Services was being leveraged for document storage, is the State maintaining the licensing related to this functionality or does the State anticipate that vendors will include this or similar services in their bid proposal?</p>	<p>NCORR will pay for Amazon AWS services.</p>
<p>70. V. Vendor Information and Instructions, D. Instructions for Offer Submission, 2. Pre-Bid Conference - RFP Page 18 - Can the State</p>	<p>See response to question 8.</p>

provide a list of vendor names that attended the Pre-Bid Conference?	
<p>71. I. Purpose of RFP, C. Summary Scope of Work/ Business Objectives - RFP Page 3 - Can the State provide a current status on their Salesforce licensing? Is there a Master Enterprise agreement in place and what is the Salesforce maintenance contract renewal schedule?</p>	<p>See response to question 11. Yes, there is an agreement in place, NCORR and vendor will coordinate license renewals.</p>

2. Changes to RFP:

- On Page 3, Section C. 1. The last sentences referenced rebuild.nc. The correct website is www.rebuild.nc.gov/
- On Page 5, Section II. A. 2) Change the reference to the RFQ to **RFP**.

3. Check ONLY one of the following categories and return one properly executed copy of this addendum prior to proposal opening time and date.

- Proposal has already been mailed. Changes resulting from this addendum are as follows:

- Proposal has already been mailed. NO CHANGES resulted from this addendum.
- Proposal has NOT been mailed and ANY CHANGES resulting from this addendum are included in our proposal.

Execute Addendum:

VENDOR: _____

ADDRESS (CITY & STATE): _____

AUTHORIZED SIGNATURE: _____

NAME and TITLE (Typed): _____

<u>DELIVERED BY US POSTAL SERVICE</u>
<p>PROPOSAL NO. 19-RFP-014530-WAX North Carolina Department of Public Safety Purchasing & Logistics 3030 Hammond Business Place Raleigh, NC 27603</p>