QUESTIONS & ANSWERS FOR RFP CUSTOMER RELATIONSHIP MANAGEMENT JUNE 30, 2023

Please be advised all questions are keyed as submitted:

Question: Does The Coalition currently use Microsoft 365 or Google Workspace? If yes, please let us know which platform is used. If no, please indicate which platform The Coalition uses or state "none".

Answer: We currently use M365.

Question: On page fifteen, paragraph U: Byrd Anti-Lobbying Amendment, the RFP references a certification attachment. We did not find the attached certification. Would you please provide it at your earliest convenience?

Answer: This will be provided to the winning bidder along with the contract.

Question: What data are you looking to capture through this CRM? Vendors, Donors, Internal staff, Sales leads, Other?

Answer:
We are looking for a web-based tool to connect primarily with our external stakeholders.
-   Business to Business – Collect organizational documents to include PII of staff
-   Business to Consumer- Collect various documents from specific individuals

Question: What would you like the dashboard to show and summarize?

Answer:
Backend:
-   Should have a robust reporting/dashboard functionality
-   Ability to manage complex workflows

Question:
Can you advise how I can indicate my specific interest in being considered as a <u>subcontractor</u> for this project and/or suggest any steps I should do at this point?

<u>Answer:</u>

That would be at the sole discretion of the winning bidder

Question: That is the challenge I am trying to figure out. If a company is the winning bidder I assume that they already have the resources (including subcontractors) in place to perform the engagement...otherwise, they presumably wouldn't have been chosen!

I am trying to understand how to indicate my interest in being a subcontractor for the project so that a company can include us in their bid. I don't know who the possible vendors for this project are, so I don't know how to indicate my background and availability to any of them for their consideration.

Answer:
I have no way of knowing who will be bidding on the project and their internal capabilities. We do not have a specific vendor pool to pull from as it is based on an open market approach.

Question: . Is there an existing CRM in place?

Answer: Yes

Question: Are you seeking an off the shelf, configurable solution or a custom built solution?

Answer: We are looking for an easy cost-effective solution to connect with our external stakeholders and are open to either

Question: You indicated in Section C: "The Proposer should include a clear description of the work to be performed, copies of reports/metrics utilized to provide services and implementation fees". What is your scope of work? Please identify all deliverables

Answer: : Please see the section labeled" Scope of Services Needed.

Question: Will the vendor or the customer host the completed solution?

Answer: Vendor

Question: How many VM's (Virtual Machines) are hosted on the three (3) VMware servers.

Answer: 4VMs

Question: Assuming that backups are local, are backups also replicated off-site as a secondary copy?

Answer: Yes

Question: Are there existing IT employee(s) of the ELC?

Answer: There are dedicated IT employees that oversee different functions, however, all help desk/infrastructure needs would be the sole responsibility of the MSP.

Question: Does the ELC anticipate the MSP to provide a permanent on-site technician? Or, does the ELC agree with the standard remote support option with periodic on-site visits and visits as required to address immediate support needs as they arise?

Answer: We would require an on-site person with a demonstrated history of dependability and expertise.

Question: Is there an existing managed services provider agreement currently in place? If so, can the detail of current support be shared to be sure we capture all existing services to provide a concise proposal.

Answer: Sufficient details have been provided, feel free to ask any more questions to solidify a quote.

Question: Regarding 99.999% uptime, please confirm which part of the requested service this is a requirement for. Is this requirement for the existing physical windows host servers and VMware servers?

Answer: Yes

Question: If the 99.999% uptime is a requirement for the existing server hardware installation, is there a budgeting opportunity to enhance the existing solution to help meet the required uptime?

Answer: TBD

Question: How long has the existing hardware been in service?

Answer: 3 years

Question: If the server hardware has been in service for more than 5 - 7 years, would the ELC consider a server technology refreshment?

Answer: N/A

Question: How many locations to be supported?

Answer: 1

Question: How many employees to be supported?

Answer: 160

Question: How many volunteers to be supported?

Answer: 0

Question: Will families and/or students need to be supported?

Answer: 0

Question: Are there remote workers which require access to the existing Windows hosts and VMware servers remotely?

Answer: No

Question: Are all services and solutions to be supported hosted internally on the existing Windows hosts and VMware servers?

Answer: We have externally hosted systems

Question: Are there external cloud solutions to be supported? Such as CRM?

Answer: No

Question: Are website and email services hosted internally on the existing Windows hosts and VMware servers?

Answer: No, website is out of scope

Question: Does the ELC of Hillsborough County have an established annual budgeted amount for the CRM system? If yes, can you tell me what the budgeted amount is?

Answer: The ELCHC is evaluating costs vs. value and encouraging vendors to provide thorough value propositions.

Question: Does ELCHC want the vendor to review the contract template and either agree to or, if appropriate, identify any language that might be problematic?   For example, paragraph #4 in *H. Proprietary and Confidential Information* is not language that we would be able to agree to (and its language that is different from our current contract with the ELC of Hillsborough.)
Does ELCHC not expect the vendor to acknowledge anything related to the contract template in the response.

Answer: The contract has been included for review purposes.

Question: My team was reviewing the RFP this morning and had a question about network monitoring and alerting as a service needed but no mention of type and size of network to monitor.
Is this information available or did I overlook it in the one document on MFMP?

Answer: Here are some more details around the network:
- Network Equipment details (Number of Switches, firewalls with Make and Model) 8 Meraki 48 port switches, 2, Meraki Firewalls, 6 Meraki Wireless access points
- Number of physical firewall devices, routers, switches and UPS (back-up power) devices are active. 10 devices

Question: Please let us know your preferred technology (i.e, Salesforce, MS Dynamics CRM,...)
Answer: We would like to explore the various solutions that fit the prescribed Statement of Work.

Question: Are there any specific compliance requirements or industry regulations that needs to be adhered to?
  a. Such as the Florida Student and Parent Privacy Act (FSPPA), the Family Educational Rights and Privacy Act (FERPA), the Children's Online Privacy Protection Act (COPPA) at the federal level and/or Health Insurance Portability and Accountability Act (HIPAA)?

b. Are there any specific security or confidentiality requirements that the managed services provider needs to comply with, particularly when handling user data or sensitive information?

Answer: We fall under the Division of Early Learning guidelines**.**

Question: Are there any goals to enhance the ELC's cyber defense posture with additional compliances?
   a. Such as National Institute of Standards and Technology (NIST-800-171) or Cybersecurity Maturity Model Certification (CMMC version 1 or 2)?

Answer: We have just completed a CIS Risk Assessment

Question: Can you provide more information about the physical Windows host servers?
   a. Are the Windows Hosts servers installed with Hyper-V?
   b. If yes to Hyper-V, how many virtual machines are hosted?

Answer: Windows Hosts are installed using Hyper-V and there are 3 VMs hosted

Question: Would you clarify the requirements for the onsite technician?
   a. What is the expected availability? Days and hours to be available at the ELC facility.
   b. Are there any specific requirements or expectations for the redundancy in onsite technician coverage?
   c. Should there be backup technicians or a rotation schedule in place?
   d. Any input to the number of FTE's (Full Time Employee equivalents) are expected to fulfill the RFP requirements?

Answer: The onsite technician should be available from 8a-5p and should be able to manage all IT related tasks, projects and user issues. In addition, to help out with other duties as assigned. The technician should be clean, dependable and trustworthy and there should be some level of built in redundancy. Just 1 FTE.

Question: Is there a preferred method for reporting and communication between the managed services provider and the ELC?
   a. How often should progress reports or status updates be provided?

Answer: Weekly check-ins, monthly reports

Question: How will the evaluation and performance of the managed services provider be measured? Are there any key performance indicators (KPIs) or metrics that need to be tracked?

Answer: The MSP will be measured by both soft and hard measures. Customer service interactions and KPIs such as Ticket Resolution and Project Delivery

Question: Can you provide more details about workstation endpoint protection and remediation requirements?

      a. Do the workstations require backup?

            i. If yes, system images or user data only?

      b. Do the workstations require device encryption and management?

      c. Are the workstations currently managed by Active Directory services?

Answer: All devices are in AD, leveraging InTune and using the MS Defender for Endpoint**.**

Question: Are there any specific maintenance windows or restrictions that should be followed with regards to the frequency and process for patching and updating the servers and workstations?

Answer: No specific maintenance windows have been determined. Patches and updates should be installed after testing.

Question: Are there any specific reporting or documentation requirements that the managed services provider needs to fulfill? What are the expectations for incident reports, service summaries, or performance metrics?

Answer: The MSP should provide systems health reports and KPI reports

Question: Can an IT organization chart be shared?

Answer: The IT organization consists of the CIO, an applications specialist and 3 Data Analysts

Question: Can budget information be shared?

      a. Is there a budget guideline (min/max) already established for this RFP?

      b. Is there an award history for this RFP that can be shared?

Answer: Every vendor is encouraged to provide their best proposal and value proposition

Question: And lastly, are there business continuity plans in place?

a. Secondary site for workers to report to?

b. Secondary site for a cold, warm, or hot server recovery?

c. If no secondary site is currently available, are there plans/goals to establish one?

Answer: Most workers can work remotely, if necessary, as applications are cloud based**.**

Question: May we ask that you share who the current incumbent IT provider is that is located in Tampa. Additionally, do they currently provide a FT dedicated IT resource for The Early Learning Coalition of Hillsborough County (ELCHC)?

Answer: Roebuck Technologies is the current provider and they are headquartered in Tampa

Question: Has a budget been set for this RFP? If so, could you share that monthly or annual budget requirement?

Answer: Every vendor is encouraged to provide their best proposal and value proposition

Question: Will points be provided to organizations that are local and head quartered in Tampa and Orlando with Regional offices in those areas as well?

Answer: The scoring will be completed as per the scoring matrix.

Question: Does ELCHC have a preference for using an existing open-source CRM, or would you prefer to build a bespoke proprietary system?

Answer: No preference.

Question: Will the new system need to integrate with other systems or existing systems? If so, will you have any existing CRM data that we will need to migrate into your new CRM portal?

Answer: No

Question: Do you have any technologies preferences for CRM development, such as PHP, Java, Python, .NET, etc.?

Answer: No

Question: In addition to allowing for various related organizations to share work products amongst themselves, will your also need e-commerce features?

Answer: No

Question: Do you have (or will you provide) examples of any reference sites or products that contain features and functions that you'd like to include?

Answer: Yes

Question: Is there a vendor currently fulfilling the CRM service?
     a. Can you provide the current vendors name?
     b. Can you provide the current CRM solution in place?
         i. Is it an off-the-shelf solution?
         ii. Is it a custom software solution?

Answer: We are currently using a custom software solution from WebAuthor.

Question: Can you provide the full scope of work and identify all deliverables?

Answer: Scope of Work is outlined in the RFP**.**

Question: Please confirm if or not this is a fixed price contract?
     c. For example, will we be able to modify our submission as we identify additional needs/requirements?

Answer: Every vendor is encouraged to provide their best proposal and value proposition.

Question: Can you provide insight on how much of the $100M proposed budget is set-aside for the CRM implementation?

Answer: Every vendor is encouraged to provide their best proposal and value proposition.

Question: The weighting for 'experience with supporting early learning coalitions' is 30%. That is a huge part of the overall weighting for consideration of award.
     d. Does this mean that anyone who does not have this experience could have difficulty in being considered?
     e. Can we ask how the weighting will be applied for folks who do not have direct experience with early learning coalitions?
     f. How will candidates with no experience in early learning coalitions be applied?
     g. Will other experience be taken into consideration?

Answer: All submissions will be scored based upon the matrix.

Question: What is the current legacy system you are using to handle your current business process?

Answer: Webauthor

Question: Going further, do you want to use Salesforce as a new system or to integrate your Legacy system with Salesforce?

Answer: Unknown

Question: Can you help us with your current Business data model or flow diagram?

Answer: We are using the system as a portal for outside stakeholders to connect with us.

Question: If you are migrating to Salesforce what is the count of Legacy data? Do you have any attachments, Task / Events attached to individual records?

Answer: We are not migrating to Salesforce. We do have workflows defined

Question: How are the contracts handled currently are you using any E-Signature applications?

Answer: There is a built in tool for e-signatures.

Question: What is the current collaboration process of families, educators, and the community, can you help define your process?

Answer: It is a mechanism by which we can receive forms, info, and document from them.

Question: Is there any payment process in the current business process? If so, are you using any payment gateway?

Answer: No

Question: Do you currently have any console to connect with Stakeholders? Are you looking to provide console / portal access to Key Stakeholders? If so what activity will be done in portal by Stakeholders

Answer: Yes, It is a mechanism by which we can receive forms, info, and document from them

Question: What are the work products, how do the Organizations share the work products amongst themselves. Do you have any process?

Answer: Modules that are built out on this system can be easily transferred to the other Coalitions.

Question: How many number of Users will be using CRM (Salesforce) system?

Answer: Approx., 50 internal and 1000+ external

Question: Does this RFP require Davis-Bacon wages?

Answer: RFP outlines specific requirements

Question: Would a satellite office be acceptable; we are HQ in Colorado but have a small office in FL?

Answer: Scores will be based upon requirements in matrix

Question: Does the current MSP have stats on average number of troubles tickets a month/year by remote vs. on-site support?

Answer: The majority of the tickets are handled by the on-site technician

Question: Is there a required on-site/virtual attendance requirement?

Answer: Yes, required on-site support tech

Question: How many sites are supported under this contract?

Answer: 1

Question: Do you have office space for our onsite staff to use?

Answer: Yes

Question: Do you expect onsite staff for the 8am-6pm M-F for coverage or just as needed?

Answer: Yes, for 8a-6p coverage and some after hours for projects.

Question: Does standard Education past performance count as a substitute for coalition past performance.

Answer: The scoring guideline in the matrix notes as follows: Attribute: Experience supporting Coalitions, full weight 30%. In order to get full points in that category, "The organization should have a history working with Early Learning Coalitions."

Question: What is the procurement budget for this project

Answer: Every vendor is encouraged to provide their best proposal and value proposition

Question: Are you looking for a software that can do this and a technician that can manage

Answer: Based upon the Scope of Services Needed, we are looking for an "Onsite technician with ability for customer to direct activities. There should be appropriate redundancy in coverage. Preference given to local providers with proven record of providing low turnover, on-site support." Thee may be some software tools that accomplish this, but we are looking for a partner that will be able to provide us the service.

Question: Define full managed service

Answer: Based upon the Scope of Work:
Provide full managed services (Contains but not limited to endpoint protection and remediation, patching/updates, health checks, remote services, and system error checking. Should also provide support for all end user activities, backups, account provisioning, rights management across propriety systems, printers and audio visual conferencing support) for: • 2 Physical windows host servers • 3 VMWare servers • Server backups (5TB) • Network monitoring and alerting • 160 Workstation Care (management/performance monitoring/remote services)   6 • 8am-6pm Support Desk care via Chat/Phone and Email with appropriate escalation abilities for Microsoft and Apple devices (SLA over 80% of tickets closed within 24 hrs, 99.999% uptime, ability to connect with technician via chat within no more than 2 minutes) • Onsite technician with ability for customer to direct activities. There should be appropriate redundancy in coverage. Preference given to local providers with proven record of providing low turnover, on-site support.

Question: What does workstation care mean specifically

Answer: Based upon the Scope of Services needed, workstation care is defined as "management/performance monitoring/remote services"

Question: Does the city My business is registered in matter? (My business is in St.Pete would I need to have an office in tampa)

Answer: The scoring guideline in the matrix notes as follows: Attribute: Local (HQ within the Tampa area) Provider, full weight 30%. In order to get full points in that category, "The organization should be headquartered in the Tampa area."

Question: Do we have to have an office in Tampa to be taken into consideration?

    a. OneconnectionIT LLC is part of a group of MSP that consist of 100+ providers through the US and can fulfill the onsite full-time technician that can do varied task.

Answer: Scoring will be based upon the scoring matrix

Question: Does ELCHC have an incumbent provider for the IT: Managed Services Provider RFP?

Answer: Yes, Roebuck Technologies is our current provider

Question: Whether companies from Outside USA can apply for this?

Answer: Based upon the RFP, only US based organizations are permitted to respond.

Question: Whether we need to come over there for meetings?

Answer: Yes, the retreat is intended to be in person.

Question: Can we perform the tasks (related to RFP) outside USA?

Answer: Yes, related tasks can be performed from anywhere

Question: Can we submit the proposals via email?

Answer: All proposals should be forwarded to yhernandeztamayo@elchc.org

Question: What are the day-to-day activities that is expected to be incorporated with the CRM?

Answer: This tool will primarily be used to communicate with out external partners. Document sharing, form generation, etc..

Question: Are there any set workflow patterns that are in use and if there are any existing workflow diagrams that can be shared with us?

Answer: Each document will have a different workflow

Question: Do you currently have an existing CRM system in place? If so, could you provide some details about the system and its functionalities? Understanding the current system will help us understand and evaluate any specific requirements for data migration or integration.

Answer: Understanding the current system will help us understand and evaluate any specific requirements for data migration or integration. We are currently using WebAuthor.

Question: If there is an existing CRM system, are you looking to migrate the data from the current system to the new CRM tool? If yes, could you please provide an estimate of the data volume and complexity involved in the migration process?

Answer: No data migration required

Question: Could you provide more information about the desired features and functionalities of the management application? What specific capabilities that should be included to allow the ELCHC team to efficiently manage and modify the application?

Answer: The system should be relatively easy for the technical team to create forms, adjust workflows and manage without support.

Question: In terms of scalability, could you provide some insights into the expected growth or expansion plans for ELCHC? This will help us understand the scalability requirements and ensure that the solution can accommodate future needs.

Answer: This will help us understand the scalability requirements and ensure that the solution can accommodate future needs. We continue to drive automations, so the system would have to be very flexible.

Question: Regarding the dashboard reports, are there any specific visualizations or reporting formats that are currently being used?

Answer: We are currently viewing dashboards through the Webauthor system as well as Power BI.

Question: Could you please elaborate on the sharing capabilities required for work products among related organizations? What types of work products are involved, and what level of access and collaboration is expected?

Answer: In the current system, we can create modules and then share with the various coalitions that are using WebAuthor.

Question: How is the collaboration with the other organizations currently handled?

Answer: In the current system, we can create modules and then share with the various coalitions that are using WebAuthor.

Question: Are there any budgetary constraints or cost considerations that we should be aware of while proposing a solution?

Answer: Each vendor is encourage to provide their best value proposition.

Question: Are there any specific approvals, notifications, or escalations that should be incorporated into the internal/external workflows? This will help us identify any necessary workflow automation features required in the CRM tool.

Answer: This will help us identify any necessary workflow automation features required in the CRM tool. Yes, the notifications are part of the various workflows.

Question: Can you provide any sample data/screenshots that needs to be captured or documented within the workflows? This will help us ensure that the CRM tool can effectively capture and track the relevant information.

Answer: This will help us ensure that the CRM tool can effectively capture and track the relevant information. These will primarily be data collection forms.

Question: Regarding the licensing of the CRM tool, could you please clarify the desired licensing model?

Answer: We would prefer flat rate pricing and not per-user licensing

Question: Are there any specific stages or milestones within the workflows that require tracking or collaboration? If so, could you please elaborate on these stages and the expected functionalities needed to support them?

Answer: Most of the workflows will be routing.

Question: What is the estimated duration of the project?

Answer: The project timeline will be based upon the various activities outlined.

Question: It is RFP-05817 for a CRM system. The RFP is attached. Maybe the info is on the portal or in the RFP, but we have not been able to find the method of submission for the joint Keen360 (integrator) and Creatio (platform vendor) proposal.

Answer: Inquiries and proposals should be directed to YHernandeztamayo@elchc.org