



ADDENDUM #3

March 4, 2022

RFQ #7675815

TITLE: E-Procurement System for the University of Rhode Island

Submission Deadline: March 30, 2022 2:00 PM (Eastern Time)

**ATTACHED ARE THE VENDOR QUESTIONS WITH STATE RESPONSES,
NO FURTHER QUESTIONS WILL BE ANSWERED.**

Interested Parties should monitor this website on a regular basis, for any additional information that may be posted.

Robert DeAngelis

Senior Buyer

The following are the vendor questions with State responses received regarding RFP 7675815

E-Procurement System for the University of Rhode Island:

Vendor A

1. Will the University of Rhode Island extend the bid submission date for RFP #7675815 to March 28th, 2022?

Answer: Yes, please see dates as updated in the addendum on the website.

Vendor B

2. Page 17, 3. Strategic Sourcing/Bid Management: The solicitation profile would allow documents with no file size limitations to be uploaded and the ability to make those documents internal and/or public. Please note that allowing no limitation on document file size is not a standard approach to allow document upload and poses serious issues with system functionality. We'd suggest to define boundaries restricting up to a defined maximum size of a document, be it on Buyer/ Vendor side.

Answer: Ideally file sizes should be restricted to no less than 100 MB.

3. Page 17, 3. Strategic Sourcing/Bid Management: During the solicitation posting, the System would be able to link the applicable vendors to the solicitation based on the solicitation's commodity code for automated email notification of the posting and also have the ability for the Buyer to add any new suppliers. We understand that system should initially display only those vendors which are registered to a specific commodity code for which the solicitation has been posted, and allow the Buyer to manually add from this list and also to add any other suppliers. Please confirm.

Answer: It is not clear what is meant when your question states that the vendors would be 'displayed'. The intent is that vendors will register in the system with a specific commodity code. When a bid solicitation is generated, a commodity code will also be selected and then an email will be sent to all vendors who have registered for that commodity; or that an emails list can be generated. Assuming the system has a mechanism to send the email notification, it is also preferable that additional email addresses can be manually added to supplement the list.

4. Page 19, 3. Strategic Sourcing/Bid Management: The System is also expected to support Continuous Recruitment solicitations where a proposal submission is accepted on a regular basis over the course of the life of the contract period. The System would be able to keep the posting period open to a specified timeframe and notify the Buyer of any new submissions to coordinate with the Review Committee on. In such a case, please explain how the price bid evaluation can be considered.

Answer: In the case of a Continuous Recruitment, there would be multiple vendors awarded a contract on an on-going basis therefore no cost comparison is necessary. It is most likely a situation where there are multiple awards to a single solicitation based on technical capability.

5. Page 20, 6. Spend/Data Analytics and Reporting: Reports should be able to run on any field in the System, including any University configured or custom field. Users should be allowed to generate any reports for their own use. Please elaborate more.
Answer: Data in should equal data out. Whatever fields allow for data to be selected or entered should also be a field accessible for reporting. While it is assumed that the system will come with standardized reports, we require the ability to customize reporting by selecting from the various fields where data is entered.
6. Page 22, 10. Integration to the University's PEOPLESOFT Oracle-based ERP System: PCard transactions should also be able to be integrated. Kindly elaborate Pcard and Pcard transactions.
Answer: The University is looking for the system to capture purchase transactions through punchouts which may allow for a PCard to be used rather than a Purchase Order and/or allow for transactions initiated on a purchase order to be paid using a PCard.
7. Page 37, SECTION 8: PROPOSAL SUBMISSION: Proposals should be mailed or hand-delivered in a sealed envelope marked RFP #7675815. Kindly request you to please allow online submission of the Proposal through email as we are based out of singapore and delivery may take 4-5 days which will hamper in our timely submission, also we believe in this digital era, online submission will help every organization to participate from across the globe and companies like us who are interested to participate can submit a better response.
Answer: Submissions must be mailed, or hand delivered per Section 7: Proposal Contents and Section 8: Proposal Submission.

Vendor C

1. User Licensing - The below breakdown of users was provided in the proposal:
The system currently has approximately 2500 users with varying degrees of access including administrative access, the ability to add, edit and delete; request only access; and read only access.
 - a. Approximately 13 Administrator levels access individuals.
 - b. There are approximately 800 requesters, 1717 approvers, 17 originators, 27 buyers.

Do you anticipate each of these individuals would need access at any given moment?

Answer: Yes

Can the vendor propose pricing for a concurrent licensing model?

Answer: Yes, but there can be no less than 2500 users and pricing must include the fee for additional users either individually or in groups (of 50, 100, or another amount).

2. Data Import - Does your organization require data import services? There was no direct reference to import requirements/numbers, but import was included in Addendum two of the original RFP. If so, please expand upon the data migration / importing requirements for the Procure to Pay System? (Such as record info, employee lists, vendor lists, etc.)

Answer: yes

- a. How many total electronic files (PDF, MS Word, etc) in current/legacy system into the Procure to Pay System?

Answer: There is no way to determine this as it will depend on the strategy and timing of the implementation. We will work with the awarded vendor to minimize this to the best of our ability as PeopleSoft will remain the system of record however creation of existing data in the new system may warrant some imports.

- b. How many total electronic files in current/legacy system? (rows in the exported spreadsheet)

Answer: Unknown see above.

- c. Where are the legacy (historic) electronic contract files currently stored? (shared folders, SharePoint, document management system, paper, etc) Are the legacy files only available in PeopleSoft?

Answer: In PeopleSoft

3. Document Templates - Do you require professional services to configure templates? a. If so, how many would be required for the awarded vendor to configure?

Answer: Unknown as it will depend on what the awarded system offers. Templates are expected and are utilized now; most in Word, Excel or pdf files.

4. Workflow - Do you require professional services to configure workflow processes?

Answer: Yes, we would like to understand our options available and compare to our existing workflow methodology to understand if Business process streamlining is possible.

- a. If so, how many would be required for the awarded vendor to configure?

Answer: Yes. Currently the Peoplesoft system approval workflow is based on signature authority by Chartfield String (CFS) is a string of identifiers consisting of (and in this order), Fund #, Department #, Program # and Project #. An example of a CFS is 500-4002-0000-0006802. Each CFS has an identified person(s) who has approval authority. Certain CFS's require multiple approvals based on the funding source identified in the CFS. There is then another level of approvals if certain commodities are used. Purchases with multiple distribution lines will also require multiple approvals. This same workflow methodology applies to requisitions, purchase orders and "miscellaneous" invoices. We may need to modify our existing workflow approval process based on system configuration and business requirements of the selected system. We are open to considering other proposed workflow processes.

Can you please provide additional details about your organization's workflow/approval processes?

- a. Can you please provide number of steps and examples?

Answer:

- 1) Fund-Dept-Program - Routed to Pooled Approver List

- 2) Fund-Dept-Program (Final Reviewer) Routed to Pooled Approver List at Level 2
- 3) Fund-Dept-Program-Project - Routed to Pooled Approver list.
- 4) Account - Specific special accounts have additional routings i.e., NCAA Compliance, Loans, Prepays, Construction, Hazardous Waste etc.

5. Reporting - Do you require professional services to configure reports?

Answer: Yes, we would like professional services for configuring reports in e-Procurement and some training on creating reports. It is unknown what data will be reported and or integrated into PeopleSoft. There are currently several regular reports that have been developed in PeopleSoft which will remain the system of record. Until the awarded product is identified, it is unclear how much of this will now be available through the E-Procurement system. There will certainly be Purchasing reports that will be needed to demonstrate contract usage, but the extent is unknown.

- a. If so, how many would be required for the awarded vendor to configure?

Answer: We would anticipate having several power users being trained to create reports and would configure/create as many reports as deemed necessary during/after implementation.

Can you please provide additional details about your organization's reporting requirements?

- a. Can you please provide number of reports and examples?

Answer: The answer to all of the above questions related to reporting is that it is unknown. PeopleSoft will be the system of record so much of what already exists may remain. New reporting is expected to allow for information related to contract use, bidding, items, commodity codes etc. It is assumed the system will contain some level of standard reporting so what additional customized reports will be needed may depend on what is lacking. Implementation choices related to configuration and business process requirements also will determine what customized reports are needed.

6. Does your organization require digital signature option vs an electronic signature option? Digital signature solutions leverage certificate-based digital identification for validation of document integrity as opposed to the more common electronic signatures. Digital signature requires additional validation services and are priced higher.

Answer: Please price with a digital signature. If the University decides to switch to electronic signature, we will obtain a cost estimate at that time.

7. If in the event our response is subject to an Open Records Request, will we be notified and given the opportunity to provide a redacted response in accordance with applicable Freedom of Information laws?

Answer: Yes

8. Will vendors require additional support or end-user support on the vendor-gateway during the registration or bid submission process?

Answer: Yes. The University anticipates that it will work with existing vendors initially to register in the new system, have training materials available for them, etc. however for ongoing technical issues, or other host related problems, customer support for vendors is expected.

9. Will the university accept digital copies on USBs for this bid submission?

Answer: No

Vendor D

1. This RFP is oriented towards purchasing a cloud solution. This implies both the licensing aspect and the implementation of the tool. We have a designated partner who will be performing the services to implement the solution, this includes working with you on establishing overall program governance, and more generally providing services for the planning, management and creation of selected Project Deliverables. Is the University amenable to purchasing the licenses from the software provider, and engage with a separate professional services firm / solution integrator for the implementation work?

Answer: Yes, the licensing and implementation are both being solicited. The following situations are allowable to ensure all of that is included:

1. The proposal response includes all aspects, and the awarded vendor is self-performing.
2. The proposal response includes all aspects and the proposing vendor subcontracts.

2. Are dual prime awards possible in this procurement? Whereas the University purchases the licenses from the software provider, and would engage with a separate professional services firm / solution integrator for the implementation work? If dual prime awards are allowable, should the additional prime respondent / vendor be completing the RIVIP process and other miscellaneous disclosures, certification and attestations?

Answer: Dual prime awards would not be possible. The proposal response must include all aspects and the proposing vendor can use subcontracts.

3. Does the university IT staff have adequate skills and access to PeopleSoft integration broker and other People Tools and development frameworks to comprehensively manage integrations with PeopleSoft? Can the university explain the skill sets of IT staff dedicated to this project?

Answer: University IT staff have an in-depth knowledge of PeopleSoft and PeopleTools however since the system we will be integrating with has not been identified, the level of expertise to accomplish these tasks cannot be defined.

4. Page 15, Supplier Enablement / Management: Does the university intend to manage 100% of suppliers within the e-procurement solution, or will suppliers continue be maintained in PeopleSoft and via the e-procurement solution?

Answer: Both, since we use the PeopleSoft supplier module for more than just vendors.

5. Is integration between the e-procurement solution and the Rhode Island state 'Perfect Commerce' solution anticipated? If so, please describe.

Answer: It is unclear to what extent an integration is necessary but what is anticipated are in the following bullet points. Much of this may be completed without a true integration, however we will need to evaluate further with the awarded vendor.

- The University will want to incorporate the State's Contract Awards for use in our e-Procurement system. This will also largely depend on the ability for the State to extrapolate this information from Perfect Commerce to our own system.
- Reporting will need to be submitted to the State on a regular basis so if an integrated format is available that would be preferred.

6. Page 22, Continuous recruitment: Continuous Recruitment, the last sentence in this section seems to be incomplete "The System would be able to keep the posting period open to a specified timeframe and notify the Buyer of any new submissions to coordinate with the Review Committee on." ... if so, can you please amend.

Answer: It is not incomplete but perhaps not adequately worded. Continuous Recruitment solicitations are expected to remain open so that vendors can be added throughout the contract period. Acceptance will be based on technical merit over cost so there will be a review committee that determines if the new proposal is acceptable. We want to ensure that since there is no closing period for the bid/solicitation that new submissions produce a notification rather than relying on the buyer to routinely check if there are any new submissions.

7. Page 29, 12.a. Project Kick-off: Can you confirm that the university will have discrete functional and technical resources available for our implementation teams within 7 days of contract signature?

Answer: This will largely depend on the requirements of the selected system. There is a strong demand for this system and therefore a commitment to dedicate the necessary resources to begin as soon as possible. Having said that 7 days is an unlikely start time but if there are aspects of the implementation that can begin immediately, we are committed to making that happen. It is understood that there will be several stages of implementation and business process decisions to be made but if certain required tasks can begin immediately (vendor/supplier on-boarding for example) then we will work to start that as soon as possible.

8. ISBE Participation: If our ISBE partner is not registered in Rhode Island but is elsewhere (e.g. NY State, SBA, etc.) will that suffice for evidence of participation as part of our ISBE participation plan, or must the ISBE be registered in Rhode Island at the time of award?

Answer: ISBE partner must be registered with the State of Rhode Island at the time of proposal submission.

9. Page 33, Staff and Organization Qualifications: Should the nature of our references be specific to higher education and more so, should they be within the last 3 to 5 years with similar sized

institutions at a similar solution scope, so as to provide evidence of recent and materially significant experience with higher education institutions?

Answer: Yes - relevant experience is required; see Green Tab#1 of the spreadsheet.

10. Page 24, Data Conversion: Can the University confirm that the respondent may engage a third-party organization to assist with defining system interactions, assessing organizational IT capabilities to support integrations, and likewise provide support for University-side of system integration points, API and similar points of integration?

Answer: Yes, subcontracting is allowable if necessary. It should be included in the respondents' costs.

11. Page 31, Implementation and project plan: Training Plan: Does the university have a learning and development organization who will be involved with the project to support change management and training efforts, to include developing training materials and end user training delivery customized for URI, or is the complete training activity the responsibility of the respondent?

Answer: It is expected that the awarded vendor will be responsible for working with the University to develop and support initial training efforts. Internal communications, documentation and individual department training is expected to be done in house. Change management is expected to be *driven* by the award vendor and will be a collaborative effort to effectuate the changes in the University community.

12. Page 31, Implementation and project plan: Support Plan: If a third party is typically engaged to implement the software solution, can that third party also reasonably expect to be engaged develop the support plan, and provide post go-live production support services?

Answer: No decision has been made to contract this out, but it is possible that that determination may be made after an assessment of the implementation and business process changes are identified.

13. Page 7, Instruction 13: If a respondent submits a bid in accordance with Section 220-RICR-3-00-13.3 and would like the opportunity to negotiate a mutually beneficial agreement with the University, will the state exercise its "sole discretion" and eliminate the respondent or will the state allow the university to evaluate the proposal and select the best respondent based on all factors including legal terms?

Answer: The State/University reserves the right to make a determination to negotiate a mutually beneficial agreement.

Vendor E

1. Can the University share the reason for canceling RFP #7651814?

Answer: Yes. The initial solicitation was canceled in 2020 after funding was frozen due to COVID. Following that it was rebid and due to a number of technicalities it was determined that there was not sufficient competition to warrant a full review and award. Several proposals were late and were unacceptable and some had missing information that disqualified them or conflicting terms and conditions. It was therefore determined to resolicit proposals.

2. What is the current inventory management system?

Answer: There is no single inventory system. Some departments maintain their own and may use spreadsheets or inexpensive tracking software. Capital equipment is captured in our Insite space and planning software.

3. What software does the University use to translate data between Peoplesoft and external systems?

Answer: Informatica