CITY OF SOMERVILLE, MASSACHUSETTS
Department of Purchasing
JOSEPH A. CURTATONE
MAYOR

To: All Parties on Record with the City of Somerville as Holding **RFP #21-33**
        Comprehensive Case Management System

From: Thupten Chukhatsang, Procurement Analyst

Date: 11/23/2020

Re: Correction: Question#3 on the Quality Requirements Form is not a requirement.
        Questions & Answers

Addendum No. 1 to RFP #21-33

Please acknowledge receipt of this Addendum by signing below and including this form in your proposal package. Failure to do so may subject the proposer to disqualification.

NAME OF COMPANY / INDIVIDUAL: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

TELEPHONE/FAX/EMAIL: _____

SIGNATURE OF AUTHORIZED INDIVIDUAL: _____

ACKNOWLEDGEMENT OF ADDENDA:

Addendum #1 _____ #2 _____ #3_____ #4 _____

Addendum No. 1 to RFP #21-33

Correction: Question#3 on the Quality Requirements Form is optional and a negative response will not result in disqualification.

Questions & Answers:

Programmatic Questions

1) **How many physical sites will the software be used at? I understand there are 30 user logins required, but need to know the number of physical sites where your case workers and other system users will be accessing the system.**

   Staff for the 3 departments referenced in the RFP are located at 3 physical locations – City Hall (93 Highland Avenue), City Hall Annex (50 Evergreen Avenue), and 42 Cross St (satellite office). However, all city buildings are currently closed to the public due to the COVID-19 pandemic. A majority of employees who will be using the system are working remotely at this time, and all services to residents are being provided remotely.

2) **What types and how many services are currently offered?**
   The services offered can be broadly described as one-on-one case management services.
   - Services can be one-time consultations or ongoing case management (multiple meetings and interactions between the client and city staff over time)
   - Case management includes support with benefits applications and enrollment (e.g. support applying for food stamps, support applying for rental assistance), housing search assistance, clinical social work services (e.g. clinical assessments and evaluations), and referrals to third party providers (e.g. legal services, area nonprofits).

Budget

3) **Can you please confirm that the budget for year 1 ? Can you also please confirm the budget for years 2 & 3?**

   Year 1 – The contract can be up to $40K.
   Year 2 and 3 – We do not have a confirmed budget at this time and future funding decisions would be pending future appropriations. Vendor should provide their pricing for ongoing licensing and maintenance for future years.

4) **Confirming first year costs for licenses and implementation are not to exceed $40,000 total. If so, has the City of Somerville considered contracting with a third-party vendor to increase its purchasing threshold?**

   The Year 1 contract is not to exceed is $40,000. At this time we have not considered contracting with third party vendors.

5) **Will the City of Somerville entertain proposals and solutions with total first year cost greater than $40,000?**

No, our year 1 budget is limited to $40,000.

Technical and Functional Specifications

6) **I have some questions from the functional and technical specifications matrix and want to understand if these are must-have requirements and would disqualify us for consideration.**

We will be evaluating each proposal comprehensively to find the best fit for our needs. You will not be disqualified if you do not meet one of more of the listed specifications, but are encouraged to fully describe your software's functionality in the comments section of the Functional and Technical Specifications matrix and your scope of work narrative response.

7) **Line Item 14 on the Functional and Technical Specifications Matric, states "Intuitive search function when creating a new participant". Could you please explain what is meant by this?**

We would like the system to have a user-friendly search feature so that a case worker can see if a client or participant already has a record in the system before they add a new client record. The purpose of the search feature would be to minimize duplicate client records and allow the case worker to see if the client has received services from other departments.

8) **Which Single sign-on (SSO) product is used by the City?**

We have currently have access to Microsoft Azure AD but are also exploring other products for single sign on.

Contract Terms and Licensing

9) **The RFP requires the vendor to execute the City's standard contract general conditions. However, the Standard Contract General Conditions do not include any terms related to software licensing. Are vendors permitted to provide our standard terms, to be incorporated as "Supplemental Conditions" as described in Section 1 of the City's General Terms?**

AND

Section 28 of the City's Standard Contract General Conditions states that "all work product, regardless of medium, prepared or collected by the Vendor in the course of completing the work to be performed under this Contract shall at all times be the property of the City." Vendor's software is provided as a license, not a work for hire

for the City. Is this acceptable? How should we list exceptions to the terms such as this in our response?

Both questions are typical terms negotiation processes that we would consider post award. The vendor may submit terms for software licensing and the City's legal team would review these terms if the vendor is awarded a contract.

10) **We wanted to confirm that the RFP response can be submitted through bid express completely.**

Yes, RFP Responses can be submitted entirely through the bid express platform.

Remote Work
11) **Given the current COVID-19 situation and the decision for many to conduct business remotely for the safety of its employees and clients, is it OK for Vendor to deliver the project remotely?**

AND

Will the vendor be required to travel onsite to understand existing processes and data specifications to develop an implementation plan? Can this be done via Zoom?

At this time, Somerville city offices are closed to the public, and staff are working remotely. Zoom or other remote meeting platforms are the preferred method for meeting with staff for the discovery process and implementation. The vendor should be prepared to implement their year 1 plan remotely.

Other Questions
12) **Is it mandatory to be Mass. Supplier Diversity Office MBE/WBE certified for this bid? it is mentioned in the RFP that A "No" response to items 1, 2, or 3, or a failure to respond to any of the following minimum standards, will result in disqualification of your proposal.**

Please see the correction at the top of this addendum. Question #3 on the Quality Requirements Form is optional and a negative response will not result in disqualification.

13) **Have you considered a Salesforce solution?**

We have researched a variety of software solutions, and will evaluate proposals comprehensively. We do not have a preference for a specific platform or software solution at this time and welcome all proposals that meet the requirements of the RFP.

14) Do you have a current Salesforce partner? If so, are they being considered for these services?

No, we do not have a current Salesforce partner.

15) Are you flexible with your implementation schedule for Phase 1 and 2? Are you expecting requirements and discovery to be included with the Phase 1 timeline or separate?

The implementation schedule for the three phases in the scope of work is an outline and may be adjusted based on the implementation plan. Phase 1 should include requirements and discovery. The vendor can provide more detail on their proposed implementation timeline in item #3 in the Scope of Work, Plan of Services and Project Management Approach.

16) Has Somerville assembled a project steering committee for decisions and to help guide the implementation? If so, please provide their roles at Somerville.

The project lead for this project is an analyst in the SomerStat department. In addition, there will be at least 1 representative from each user department (Health and Human Services, Office of Housing Stability, and Office of Immigrant Affair) and 1 representative from the city IT department that will be involved in project planning and implementation.

17) Please describe your ability and preference to manage the future state solution internally?

Future management depends on the platform and the technical requirements for managing the solution. We anticipate the City will have some internal staff capacity for basic platform management (e.g. account provisioning, creating reports) but would not have the capacity for more substantive product management.

18) Please describe your preferred project management approach (e.g., waterfall, agile, hybrid, etc.)

The city does not have a preferred project management approach, and is open to adopting the approach preferred by the vendor for implementation.

19) What do you value most in a partnership?

- Open communication
- Clear expectations and accountability
- Technical expertise and the ability to communicate with non-technical users

20) Do you have a Master Data Management strategy?

The City does not have a master data management strategy at this time.

21) What are the biggest challenges to current user adoption?

We do not have a current case management system, so the roll out of a new system will be a significant change in how staff work. Potential challenges are training in a remote environment and demonstrating the value added by adopting a new system. In addition, as the COVID-19 situation evolves, the availability of social services, eligibility requirements for benefits, and other programmatic requirements are constantly changing. Ensuring the platform is relevant to staff needs and workflows in this environment may be a challenge.

22) On a scale from 1-10 (10 being highest/best), how well are your current processes and systems documented today?

6 – some processes and workflows are documented, while others are more informal. There is variation across departments.