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**DIVISION OF FINANCIAL ADMINISTRATION**

**ADDENDUM No. 1  
RFP No. 2275**

**Date:** July 11, 2019

**Subject:** Revisions, Questions. Official Answers, and Clarifications

**Title:** Service Disabled Veterans Enterprise System (SDVES)

**Bid Due Date:** August 9, 2019 @ 2:00 PM

**Address Bids to:** Eric Schantz  
Division of Financial Administration/Agency Procurement Office  
NYS Office of General Services  
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RFP No. 2275

**To Prospective Bidders:** This addendum is being issued to provide the following:

- Revised Section 4 – Evaluation and Selection Process
- Revised Section 2.4, Item 2 – Database Requirements
- Revised Attachment 1 – Cost Proposal
- Revised Section 5.5 – Retainage
- Clarification of M/WBE and Insurance Requirements
- Official answers to questions submitted by vendors
- List of known attendees at the Optional Pre-Bid Conference

**Revision 1:**

RFP No. 2275 Section 4. Evaluation and Selection Process shall be replaced in its entirety with Section 4 - Evaluation and Selection Process attached hereto.

**Revision 2:**

Section 2.4, Item 2 Database Requirements is revised to state the following, "Import and store legacy data (current data storage is almost 20 GB. There are about 5000 Excel files and about 800 Word and

PDF documents. Some data includes Social Security numbers; there are no credit card numbers. Number of fields varies by type of legacy data. The largest number of fields is 23.”

**Revision 3:**

RFP No. 2275 Attachment 1 – Cost Proposal Form shall be replaced in its entirety with Attachment 1 – Revised Cost Proposal Form. The revised Cost Proposal will be posted to the OGS Bid Calendar <https://ogs.ny.gov/procurement/biddocument/2275bid>.

**Revision 4:**

The Retainage paragraph in Section 5.5 is hereby revised to read as follows:

OGS will retain and reserve 15% of the value of each completed deliverable to be paid to the Contractor 90 days after system go-live. OGS also reserves the right to renegotiate payment terms and percentages related to deliverables to prevent unnecessary front-loading of the total cost of project.

**Clarification 1:**

OGS wishes to ensure understanding of the distinction between MWBE goal requirements as outlined in RFP Appendix E, and the MWBE Diversity Scoring as outlined in RFP Section 4.2.D.

All proposers are required to make a good faith effort to meet the goals set forth in Appendix E (15% MBE and 15% WBE). In demonstrating these efforts, proposers are required to submit an MWBE Utilization Plan (blank form # MWBE 100 included in RFP Appendix B) and it should be included in their Administrative Proposal. This will not affect proposal scoring, but it may impact the ability for OGS to award and execute the contract.

The Diversity Scoring outlined in Section 4.2.D is a scored item. It is intended to rate the diversity practices of the proposers’ firm. Proposers should complete and submit the Diversity Practices Questionnaire (Attachment 25) with their Administrative Proposal.

**Clarification 2:**

Appendix D – Insurance Requirements, Proof of Insurance is due upon notification of tentative award. Proposers should review and consider the required insurance coverages when preparing their bids.

**Questions and Official Answers:**

- Q1.** Can OGS supply the company names and contact information of all parties that attended the Pre-Bid Conference?
- A1.** OGS is providing the names of the firms that, to the best of our knowledge, attended the Optional Pre-Bid conference. Refer to list herein.
- Q2.** Can a PRIME contractor that is a certified as both a SDVOB and MWBE fulfill the diversity requirements solely on its own?
- A2.** Regarding MWBE goals, a prime contractor may fulfill either the MBE or WBE requirement but must make a good faith effort to meet the remaining goal requirement. Also see Clarification #1.

- Q3.** In the RFP, it states that “OGS will retain and reserve 15% of the value of each completed deliverable to be paid to the Contractor 30 days after successful completion of the project and acceptance of the final deliverable. OGS also reserves the right to renegotiate payment terms and percentages related to deliverables to prevent unnecessary front-loading of the total cost of project.” Is the definition of “successful completion of the project” the same as “acceptance of the final deliverable” in the paragraph above? (Page 35 of 43)
- A3.** See Revision 4 above.
- Q4.** Will OGS be providing licenses for use of LoadRunner for testing? (page 20 of 43)
- A4.** Yes. NYS will provide LoadRunner functionality as required.
- Q5.** In the RFP, it states that “On-site training to OGS DSDVBD staff in a “Train the Trainer” format (up to 3 small group sessions)”. What is the definition of “small”? Up to how many trainers per session? (page 20 of 43)
- A5.** We expect the Contractor to train 6-8 people per session.
- Q6.** 2.2 GENERAL REQUIREMENTS 10. "verifying that legacy data is imported and accessible." Please provide more details on legacy data and its volume other than list of excel files and word/PDF documents which are provided in the RFP.
- A6.** The largest number of fields is 23. Current data storage is almost 20GB. There are now 5000 Excel files and 800 Word and PDF documents. Refer to revised Section 2.4 Item 2 - Database Requirements herein.
- Q7.** 2.2 GENERAL REQUIREMENTS 10. Onboard up to 150 NYS agencies, and authorities that may be required to utilize the system. It is safe to assume that we are onboarding Agency/Authority Administrator and Agency/Authority users. There are no additional details needed to be imported
- A7.** No additional details. Onboarding means each agency and authority has access to and full use of the all system functions appropriate for both Agency/Authority Administrator and Agency/Authority users.
- Q8.** 2.3 SDVOB APPLICATION AND CERTIFICATION REQUIREMENTS 11. <https://ogs.ny.gov/Veterans/Docs/SDVOBCertificationApplication.pdf>. None of the URL are working those are provided in the document
- A8.** The DSDVBD website is [ogs.ny.gov/veterans](https://ogs.ny.gov/veterans) and the url where the application is found is <https://ogs.ny.gov/veterans/service-disabled-veteran-owned-business-certification#certification-application>

Note that the following links have also been updated:

3.1 RFP Questions and Clarifications OGS Bid Calendar <https://ogs.ny.gov/procurement/bid-opportunities>

3.8 Instructions for Proposal Submission, Visitor Parking <https://empirestateplaza.ny.gov/parking>

6.5 Tax and Finance Clause <https://www.tax.ny.gov/>

6.14 Vendor Responsibility, Instructions and User Support  
[https://www.osc.state.ny.us/vendrep/forms\\_vendor.htm](https://www.osc.state.ny.us/vendrep/forms_vendor.htm)

6.15 New York State Vendor File Registration, For more information on the vendor file please visit the following website:

<https://www.osc.state.ny.us/vendors/index.htm>

Forms to be completed: <https://www.osc.state.ny.us/vendors/1099s.htm>

- Q9.** 2.4 DATABASE REQUIREMENTS 13. "Import and store legacy data (current data storage is approximately 10GB. There are about 4800 Excel files and about 700 Word and PDF documents."
- a. Please provide more information type of data present in Excel files? Data Dictionary with the record count would be really helpful
  - b. 700 word and PDF document is the max size of documents or they are any additional electronic documents outside of the count currently mentioned?
- A9.** a. Examples of the types of data can be found in attachments 10-17, and 22 of the RFP, the application for NYS SDVOB Certification (link in RFP Section 2.3 requirement #1) and in the list of supporting documents found in Part X of the application for NYS SDVOB Certification.
- b. Refer to Q&A #6.
- Q10.** 2.11 TECHNICAL REQUIREMENTS 19. maximum of 250 at any given time. Does user count include OGS Staff, Agency Staff and SDVE contractors?
- A10.** Yes
- Q11.** 2.11 TECHNICAL REQUIREMENTS 19. "able to call the NYS Internet Content Adaptation Protocol (ICAP) virus scanner via a web service or API call before writing files into storage. Does ITS FileNet service support NYS Internet Content Adaptation Protocol (ICAP) virus scanner via a web service or API call option out of the box?
- A11.** Yes
- Q12.** 2.15 STAFFING REQUIREMENTS 21. The Contractor must provide a Project Manager and a Business Analyst as key personnel for this project. Project manager and Business analyst will have to be from a prime vendor or we can propose these resources from our partner?
- A12.** The Contractor may provide either or both of those resources from a partner provided they still meet the 20% SDVOB self-performance requirement.
- Q13.** Proposer Experience and Qualifications 24. The Proposer should provide the following information for three projects successfully completed within the last five years for clients within the United States. The projects should be similar in scope and size of this project Does prime need to meet this requirement or we can use partner quals to meet this requirement?

- A13.** The proposer should provide all the information requested in section 3.3 Technical Proposal under the heading “Proposer Experience and Qualifications” for themselves AND any subcontractors performing more than that 15% of the work. If the proposer has not successfully completed three projects of similar scope and size of this project, information for smaller projects completed by the proposer and/or additional projects completed by proposed subcontractors may be provided.
- Q14.** MWBE Diversity Practices 29. "In standard procurements, 5% of the total technical evaluation is provided for proposers that meet SDVOB, MWBE, or SBE requirements. Due to this procurement’s status as a set-aside, all proposers already meet this requirement. We are SDVOB firm. Do we still need to look for SDVOB, MWBE, or SBE firm to meet MWBE Diversity Practices requirements?
- A14.** See Clarification #1 and Q&A #2.
- Q15.** SLA Deliverable Approval. Is there any SLA that we will have to follow to meet deliverable approval or we can propose our own SLAs for deliverable acceptance?
- A15.** Refer to Section 2.14 - Acceptance of Deliverables
- Q16.** 2.2 GENERAL REQUIREMENTS 29.33333333. "verifying that legacy data is imported and accessible. Please provide more details on legacy data and its volume other than list of excel files and word/PDF documents which are provided in the RFP.
- A16.** Refer to Q&A #6.
- Q17.** Section 2.0 (P.9) Scope of Work, Item 3: Provide flexible reporting capabilities. Does this apply to reports within the system or the ability to expose views for the consumption of data by other reporting applications internal to the agency (or both)?
- A17.** This applies to reports generated from data in the system for various uses by the DSDVBD.
- Q18.** Item 4: Allow for online applications for NYS Service-Disabled Veteran-Owned Business Certification. Per the process laid out on the state website, there is an onsite inspection component. How much of that is expected to be part of this RFP?
- A18.** DSDVBD users must be able to track site visits, capture the status of the site visit, enter comments, upload documents, and capture the date and time comments
- Q19.** Item 8: Import legacy data. How many records and how many fields per record?
- A19.** Refer to Q&A #6.
- Q20.** Section 2.2 (p.9) - General Requirements, Item 8: The email shall include a link directly to the item requiring action (e.g. confirm payment). Is there a payment integrator like City Pay or is the expectation to build a custom payment interface in the system?
- A20.** This requirement is only asking that the vendor solution, when sending out email notifications, be able to route the user directly to the page of the application that the user needs to see in response to the email notice. The sample given was not in reference to making an online payment, but rather having a contractor confirm that a scheduled payment was made to a subcontractor, or perhaps to have the subcontractor confirm that payment was received.

- Q21.** Section 2.3 (p. 13) SDVOB Application & Certification Requirements, Item 23c – Allow DSDVBD to track site visits, capture the status of the site visit, enter comments, upload documents, and capture the date and time comments. Is this real time or not? Is this part of the Mobile App Solution described further in the document?
- A21.** This does not need to be real time. OGS does not require a custom mobile application. The solution must be mobile friendly. (Refer to 2.11, Item 11 - Technical Requirements)
- Q22.** Section 2.1 (p.20) Technical Requirements Item 11: Be mobile friendly, fully functional and display correctly on devices such as smartphones, iphones, ipads, tablets. Is it necessary to support this on the device browser and not a mobile app?
- A22.** Refer to Q&A #21.
- Q23.** Insurance. As the State is aware, many SDVOB firms are small and may not carry the levels of insurance coverage requested by this RFP. Would OGS consider revising these insurance requirements to be consistent with other State technology contracts, such as PBITS or HBITS? The PBITS contract requires only a \$2M limit for Technology E & O and does not require Cyber Liability at all. While we understand the increased need for both coverages in the industry, the current limit stated in the RFP are cost-prohibitive to small firms.
- A23.** No. Insurance requirements will remain the same. OGS has determined that the information being disclosed is of a personal, private, and sensitive nature, and therefore requires a higher risk classification. Also see Clarification #2.
- Q24.** Appendix D, Insurance Proof of Coverage. Please confirm that the statement in Appendix D that “Proof of Coverage is Due: at time of Bid submissions” is an error, as other areas of the RFP specify “upon award notification.”
- A24.** Refer to Clarification #2.
- Q25.** Section 3.4, Administrative Proposal. Is the Administrative Proposal to be submitted as a separate document or housed in the same binder/package as the technical proposal? If the Administrative Proposal is submitted as a separate document, how many originals and copies are required?
- A25.** Administrative proposal should be separate from the Technical and Cost Proposals. Submit four originals of all required forms from RFP Appendix B (see Section 3.7 - Packaging of RFP Response). Submit one original, and one copy of the Proposal Submission Checklist, and Security Guidelines Checklist. Submit 1 original and 5 copies of the Diversity Practices Questionnaire.
- Q26.** General Logistical Questions. Will NYS OGS provide workstations to connect to the NYS OGS network while the selected firm is on NYS OGS premises? Will the NYS OGS network be available remotely 24/7 for team members to access with their own devices (laptops, etc.)? Can team members utilize removable storage devices (flash/USB drives, smartphones, etc.)?
- A26.** Yes. Yes. No, State issued removable storage drives may be available upon request.

- Q27.** Section 5.3.2 p 30. May the required SW be procured from a certified NYS MWBE reseller, at NYS contract prices (in the Umbrella) and count towards MWBE spend targets for this procurement?
- A27.** Proposer can only procure from NYS contracts if they are authorized to do so. <https://ogs.ny.gov/procurement/ogs-centralized-contracts> Any use of an MWBE serving a commercially useful function will satisfy MWBE goals.
- Q28.** Section 2.15 p21. The PM and BA are required to facilitate on site requirements sessions with the following stakeholders: DSDVBD, State Agencies and Authorities, SDVOB Contractors, Prime Contractors, with the location predominately being Albany, but may include other areas in New York State, including New York City. Can you be more specific on the number of stakeholder groups and individuals, and the number of locations these requirements sessions will include? Or a maximum required number for each?
- A28.** We would like to invite 1-2 representatives each from approximately 100 NYS Agencies and Authorities, at least 30 SDVOBs, and 10 Prime Contractors. We would like to offer a minimum of at least 5 requirements sessions with at least 2 held in Albany and 1 located in NYC. We expect at least 50% of those invited will choose to attend.
- Q29.** Section 1.3 p 6
- a. Can you please confirm that “Proposer” can mean a team comprised of an SDV prime and a non-SDV subcontractor partner?
  - b. Would OGS consider a COTS solution if it were on-prem?
  - c. If a COTS solution would be considered – would OGS procure the software on this contract?
- A29.**
- a. The SDVOB Prime can partner with a non-SDVOB subcontractor, however the SDVOB prime is considered the Proposer.
  - b. An on-prem COTS solution will be considered.
  - c. The costs for the COTS package must be provided as part of the Proposer’s solution, however, OGS reserves the right to make the actual procurement off of an existing NYS contract if it costs less.
- Q30.** Page 13 of 43, Section 2.4 -DATABASE REQUIREMENTS
- a. Does the current public facing searchable database of SDVOB vendors provide the desired functionality, or are there additional requirements to be built?
  - b. Will the public facing searchable database require search users to register before being able to search?
- A30.**
- a. We desire greater functionality than the current public facing searchable directory, including the ability to perform advanced searches using multiple criteria.
  - b. The public facing searchable database should allow users to search without requiring registration.

**Q31.** Page 14 of 43, 2.6 REPORT REQUIREMENTS.

- a. How flexible does the custom reporting capability requested in item 2 need to be?
- b. Which fields or entities in the database need to be included?
- c. Are there role-based limits to the data access?

**A31.** a. As flexible as possible based on the available data in the database.

b. As many as possible.

c. Yes

**Q32.** Page 18 of 43, 2.10 TRAINING REQUIREMENTS. After initial training when the system is implemented, what is the expectation of in-person or on-site training to be provided during the maintenance and support term of the contract?

**A32.** There is no expectation for training post implementation.

**Q33.** Page 19 of 43, 2.11 TECHNICAL REQUIREMENTS. Does every screen and view, especially larger data tables and report screens, need to be functional on a smaller smartphone screen (typically 360 pixels by 640 pixels)? If not, what is the minimum screen size for these screens or views?

**A33.** Yes.

**Q34.** Pg. 8 2. Calculate agency exclusions, exemptions and eligible spending using NYS financial data For the calculation on agency exclusions, exemptions and eligible spending cited in Section 2, is the financial data limited to what is listed in Section 2.5.2 and defined in Attachment 23, Financial Interface?

**A34.** Yes.

**Q35.** Pg. 10 2.2 3. Onboard up to 150 NYS agencies, and authorities that may be required to utilize the system. All agencies and authorities must be capable of accessing the system, verifying that legacy data is imported and accessible, importing new financial data from SFS, or manually uploading from other sources, and using all the system's other compliance and reporting functions. For the calculation on agency exclusions, exemptions and eligible spending cited in Section 2, is the financial data limited to what is listed in Section 2.5.2 and defined in Attachment 23, Financial Interface?

**A35.** Yes.

**Q36.** Pg. 10 2.2 4. All data within the solution must be searchable, exportable and reportable. It should provide as much flexibility as possible to create custom reports using the business and financial information within the system (Refer to Section 2.6. Report Requirements.) In Section 2.2.4 it states that "all the data within the solution must be searchable". What type of search capability is being requested? Should all fields be searchable?



- A36.** We would like the search capability to be as robust as possible including as many fields as possible and the ability to create custom searches using multiple fields (i.e. search for businesses in the SDVOB Directory by “Keyword”, “Home Region”, and “Business Size” or search agency/authority reports for disbursements by “NYS Agency or Authority”, “SDVOB Vendor” and “Reporting Period”.
- Q37.** Pg. 10 2.2 5. Provide a single entry in a centralized location for storing and displaying SDVOB data that can be shared among DSDVBD What is meant by a "single entry in a centralized location"? Does this refer to an index listing of SDVOBs on a screen available via the GUI?
- A37.** The solution will be the single collection point for all of the information the DSDVBD uses in its activities as required in the RFP.
- Q38.** Pg. 10 2.2 6. Track communication within the solution between internal and external stakeholders. The ability to track case specific comments is required for applications, goal plans and agency narratives as well as the ability to link emails for all functions. Section 2.2.5 talks about tracking communication within the solution. What type of communications needs to be tracked? Does this mean a comments field in the record that internal and external users can view or update? Also, is it acceptable that only emails generated within the application will be tracked.
- A38.** The ability to track case specific comments is required for applications, agency/authority reports, goal plans and agency narratives as well as the ability to link emails for all functions. The solution must track communications related to any activities in the solution that require a request for, submission of, and receipt of some type of information, document, or action. A comments field in the record that internal and external users can view or update may be a way to address this. It is not acceptable that only emails generated within the application be tracked. The responses to any emails generated in the application must also be documented.
- Q39.** Pg. 12 2.3 a. This number shall be six characters long and be attached to the vendor throughout the life of the program) Section 2.3.13.a states requirements for a unique applicant identifier. Would a unique id be permissible instead of a 6 character identifier? Will the legacy data contain a 6 character identifier for applicants? Will this id become the SDVOB's unique identifier if they are certified by the DSDVBD?
- A39.** The 6-character identifier is part of the legacy data and is used in many DSDVBD functions. We do not want a substitute for the 6-character identifier. The 6-character identifier is the SDVOBs unique control number that remains with the firm as long as it is certified as a NYS SDVOB.
- Q40.** Pg. 12 2.3 b. Existing assigned SDVOB Control numbers cannot be changed and must be tracked in the proposed solution. Section 2.3.13.b states that existing assigned SDVOB Control numbers cannot be changed and must be tracked. Does this refer to the unique id assigned within the new system or does it refer to an identifier in the legacy data?
- A40.** We would like the unique ID created in the solution to follow the pattern of the existing SDVOB control numbers.
- Q41.** Pg. 12 2.3 22. Accept uploaded documents detailing the proof of reason for change in xlsx, docx and PDF format. Section 2.3.22 states that the system will accept uploaded documents detailing the proof for reason of change. Is a document required which contains the proof of reason for change, or could this be using a mandatory field that must be completed when a

new document is uploaded? Do multiple reasons/proof files need to be stored? Can an example be provided?

- A41.** The need for and type of proof depends on the request. If an SDVOB requests their phone number be changed in the directory, proof is not likely to be required. If a SDVOB wants us to update their capabilities in the directory and claim they can provide new products or services, we need proof they can actually deliver and/or perform. Such proof may be a new license, invoices, receipts for new equipment purchased, or any other evidence deemed acceptable by the DSDVBD.
- Q42.** Pg. 13 2.3 24. Accept digital signatures from each applicant. There is no current solution. The vendor shall recommend this in the solution. Section 2.3.24 discusses a digital signature. Is this an attestation from the user (such as a checkbox or other verification) or is the vendor required to integrate a digital signature application such as Adobe?
- A42.** The SDVOB application requires an attestation in part VIII and a certification/declaration in part IX.
- Q43.** Pg. 13 2.3 25. Prompt SDVOB vendors to confirm changes or no changes to their associated vendor profile upon each log-in. Section 2.3.25 says to prompt the users to confirm whether changes are needed to their associated vendor profile upon each login. Is a pop-up envisioned that will be shown every time a vendor logs into the system?
- A43.** Yes.
- Q44.** Pg. 14 2.5 3. Establish an import mechanism for all other financial data points. Agencies and authorities who do not use SFS will have to manually upload their data from whichever financial system is being used, such as Quickbooks, Sage, Dynamics, etc. The frequency of data (e.g. Contractor Compliance reports are due to agencies and authorities monthly, Agency/Authority SDVOB Activity Reports are due to the DSDVBD quarterly). Section 2.5.3 discusses the manual upload of data from other financial systems used by some of the agencies and authorities. Is it permissible for the vendor to establish an interface standard format in which the data will be received?
- A44.** Yes.
- Q45.** Pgs. 14 2.5 5. Provide users the ability to download the exact data they entered. In Section 2.5.5, are the users cited the staff of the agencies and authorities?
- A45.** Yes.
- Q46.** Pgs. 14 2.5 6. Support interface with NYS Directory Services for user authentication (Refer to Attachment #6 - NY.gov ID Specifications). OGS will be creating the NYSDS accounts for authentication and the vendor must manage authorization within the application. AD and NY.gov are the only acceptable methods of authentication. In Section 2.5.6, is a single signon capability desired? Will NY State employees all have logins through NYSDS? Do applicants or certified SDVOBs also have a login through NYSDS?
- A46.** All external users will use NYSDS for authentication. If it is possible for state employees to be authenticated through AD, that would be preferred. But if it isn't possible, then state employees would also use NYSDS.

- Q47.** Pgs. 15 2.6 2. Create custom reports from data within the solution. In Section 2.6.2, it states "Create custom reports from within the solution". Does this refer to an ad hoc reporting capability or is the vendor being asked to estimate effort for a pre-determined set of reports? Who will be able to request these reports?
- A47.** It refers to ad hoc reporting requested by DSDVBD from all data and agency/authority administrators from data entered for their own agency/authority.
- Q48.** Pgs. 15 2.6 5. Save reports in the solution. In Section 2.6.5, it states "Save reports in the solution". Does this refer to the actual reports or an ad hoc query?
- A48.** Actual reports.
- Q49.** Pgs. 15 2.6 6. Allow Agencies/Authorities to electronically submit required reports to DSDVBD. What is the submission process discussed in Section 2.6.6?
- A49.** All reports are currently submitted via email in excel, word, or pdf format. Contractor compliance reports are submitted monthly, agency/authority activity reports are submitted quarterly, and agency goal plans and narrative statements are submitted annually.
- Q50.** Pg. 16 2.8 2. Enable Agencies/Authorities to assign SDVOB goals to contracts. Regarding SDVOB Goals set by the Agencies and Authorities, will the same set of goals apply to every contract issued by an Agency or Authority?
- A50.** Goals are evaluated and set on a case-by-case basis.
- Q51.** Pg. 16 2.8 3. Allow contractors to submit SDVOB utilization plans. Regarding Contractor submission of SDVOB utilization plans, does each contract have only one prime contractor that will fill out the utilization plan?
- A51.** Yes.
- Q52.** Pg. 18 2.9. Testing requirements for the solution must include: In Section 2.9, what environments will be provided for the vendor to use within the NYS Data Center, such as Development, Test, and Pre-Production?
- A52.** ITS will stand up whatever environments the bidder deems required for their solution. For a custom built solution, 3 environments (Dev, Test, Production) are typically the minimum number.
- Q53.** Pg. 18 2.9 5. NYS requires the use of LoadRunner for testing and performance. In Section 2.9.5, will LoadRunner be provided for use by the vendor?
- A53.** Refer to Q&A #4.
- Q54.** After the software is installed on your server how will my team make updates and changes to the software?
- A54.** The vendor will work with ITS for any changes/updates to the software.

**Optional Pre-Bid Conference Attendees**

Abis  
Clevermethod  
Cloud Capital  
Deloit  
GCom  
HonorVet Technologies  
Launchtech  
Maroon Software  
Mavec Advisors  
NormelTech  
Roadhouse Innovation  
Skyline Connections  
Spruce  
Strider  
TAMD Management  
Teksana  
Thundercat Technology  
Vanguard Tech Group  
Veratics

All other terms and conditions of RFP No. 2275 remain unchanged.

If submitting a proposal, this Addendum No. 1 for RFP No. 2275 must contain an original signature, be dated, attached to, and made a part of your proposal.

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Company Name

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Address (include City, State, Zip)

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Proposers Name (please print)

Title

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Signature

Date

## Revised Section 4 - Evaluation and Selection Process

### **4. EVALUATION AND SELECTION PROCESS**

#### **4.1 PROPOSAL EVALUATION**

Each proposal will be evaluated and scored based upon the criteria set forth in this Section. Proposals will be evaluated for best value to the State.

A team of OGS and ITS employees will evaluate each proposal and initially determine whether a proposal is responsive to the requirements of the RFP.

Key personnel from the Proposers that submit responsive proposals (or the selected finalists – see Section 4.3 below) must attend a presentation to explain or clarify content within their submitted technical proposal. This is not an opportunity to introduce supplemental submission information. Rather, the Proposer will be requested to cover the major points of its submitted technical proposal. The presentation will be held at OGS' offices in Albany on a date and time to be designated by OGS.

Information learned during the presentation will be considered in the technical scoring. OGS personnel conducting the presentation will not inquire about any cost components of proposals. Presenters must not offer any information regarding cost components of their proposals. Any mention of cost components of the proposal may result in rejection of the proposal.

OGS also reserves the right to conduct reference checks. In such cases, the Proposer shall be responsible for the availability of the reference contacts.

The technical evaluation team will subsequently evaluate and score each responsive proposal for items A through D listed below.

The submitted Required Infrastructure tab of the cost proposal – WITHOUT PRICING APPLIED will be provided to the technical evaluation team for consideration.

The evaluation team will grade proposal criteria A, B, and C using a 0 - 10 scale. Proposal Criteria D will be graded by the evaluation team using the Diversity Practices Scoring Matrix (Attachment #26). Each grade will be applied to the respective category weight to determine the category points. Example: a perfect grade in all categories (A-D) would receive 650 points (65%).

Scores from each of the Proposers, including items A - E listed below, will be totaled and the Proposer having the highest score will be ranked number one; the Proposer with the second highest total score will be ranked number two and so on.

#### **4.2 PROPOSAL SCORING**

##### **A. Proposer Experience and Qualifications (15%)**

Each Proposal will be evaluated based on the Experience and Qualifications of the proposing firm and any subcontracted firm performing more than 15% of the work. This will include an evaluation of the Proposer's relevant experience and length of service in the industry its ability to perform the required services

**B. Project Plan (35%)**

Each Proposal will be evaluated as to the completeness of and the extent to which the Project Plan described in Section 3.3 - Technical Proposal, meets or exceed the project requirements in Section 2 - Detailed Scope of Work.

**C. Staffing Plan (11.75%)**

Each Proposal will be evaluated as to the completeness of and the extent to which the Staffing Plan described in Section 3.3 - Technical Proposal, meets or exceed the project requirements in Section 2 - Detailed Scope of Work.

**D. MWBE Diversity Practices (3.25%)**

In standard procurements, 5% of the total technical evaluation is provided for proposers that meet SDVOB, MWBE, or SBE requirements. Due to this procurement's status as a set-aside, all proposers already meet this requirement. Therefore, OGS has determined, pursuant to New York State Executive Law Article 15-A, §313-a that the assessment of the diversity practices of Proposers for this procurement is practical, feasible and appropriate. Accordingly, to receive certain evaluation points, Proposers are required to complete and submit, the Attachment #25 - Diversity Practices Questionnaire.

OGS will review the Proposer's responses to the Diversity Practices Questionnaire – Attachment #25, and score them per the Diversity Practices Scoring Matrix – Attachment #26, and in comparison, to the responses of all Proposer's to this solicitation. The points received for each response will be added to achieve a Total Diversity Score of up to 100 points. The Total Diversity Score will then be weighted to achieve a weighted score of 5% of the total technical score or up to 32.5 points.

**E. Cost (35%)**

The Grand Total Bid Amount as represented on Attachment #1 - Cost Proposal will be evaluated in relation to all cost proposals submitted by responsive Proposers.

**4.3 OPTIONAL DOWN SELECT PROCESS**

**Preliminary Score and Down Selection**

In the event that there are six or more responsive proposals, OGS reserves the right to perform a down-select process as follows:

The calculated scores following the process outlined above will be considered preliminary scores. The firms with the three highest total preliminary scores, and any additional firms within or equal to 50 points of the highest preliminary score, will be the finalists. At this point, the Proposers selected as finalists as well as the proposers not selected as finalists will be notified.

**Presentations**

Bidder finalists will be scheduled to attend a presentation as described in Section 4.1 above.

**Recalculation**

Cost proposals (item E) will be recalculated relative to the cost proposals of the finalist firms and the formula described for Cost Proposal Evaluation above. Following the interviews and presentations, the evaluation team may adjust their technical scores for items **A, B, and C**.