

Questions received on Grants Management System and DASNY's responses:

1. Can you please provide DASNY's number of unique sub-recipient organizations?

Response:

DASNY currently has approximately 5,000 grantees.

2. Can you please provide DASNY's average annual grant revenue?

Response:

DASNY is currently administering approximately 3,900 grants totaling approximately \$1.9 billion

3. Have you had demonstrations and/or conversations with grants management vendors? If so, with whom?

Response:

DASNY has reviewed the following three (3) products/systems demos for informational purpose:

- 1) Product: FluidReview; Vendor:SurveyMonkey
- 2) Product:Fluxx; Vendor:FluxxLabs
- 3) Product & vendor name: eCivis

We encourage all interested vendors to respond.

4. Have you had any assistance in preparing this RFP? If so, from whom?

Response:

The RFP was prepared by internal DASNY staff from the Grants Administration, Information Services, and Procurement Departments.

5. Has a budget been approved for this project? If so, for how much?

Response:

This is a qualification based RFP. DASNY is seeking a software solution that best meets the requirements set forth in the RFP. A final budget will be negotiated with the successful vendor.

6. Does DASNY have a preference regarding a SaaS vs a non-SaaS solution?

Response:

DASNY is open to both options but a SaaS solution is preferable.

7. Does DASNY have an anticipated project timeline (project kick-off, system go live, etc.)?

Response:

Project would be initiated immediately after the product is purchased and contract is executed. DASNY anticipates implementing the Grants Management system by the end of the year.

8. Now that this solicitation is criteria based, do you have a scoring matrix? If so, are you able to provide it?

Response:

The criteria for selection shall be the qualifications listed in Sections 2 and 3 of the RFP.

9. What is the annual budget for maintaining the solution?

Response:

This is a qualification based RFP. DASNY is seeking a software solution that best meets the requirements set forth in the RFP. A final budget will be negotiated with the successful vendor.

10. Can DASNY please provide additional information on why DASNY is out to bid with this solicitation Bid No. 499 rather than selecting a vendor from the previous Bid No. 582?

Response:

DASNY decided to engage a consultant for the Grants Management system through a qualification based selection process.

11. Can DASNY please provide an outline of the overall difference in the scope of work between Bid No. 582 vs the new Bid No. 499 as they appear to be almost identical?

Response:

The core requirements remain the same. We are looking for a configurable system that provides an interface for external users to submit grant applications & monitor progress, and an interface for internal users to review applications & manage correspondence with grantees & applicants.

We want to clarify that we are not looking for a custom solution built specifically for DASNY but are interested in a highly configurable product that can be configured to satisfy our requirements. We have relaxed the requirement for Active Directory integration (single-sign-on).

DASNY decided to engage a consultant for the Grants Management system through a qualification based selection process.

12. Can DASNY please provide an estimated budget for the initiative to furnish and implement a packaged solution for this initiative?

Response:

This is a qualification based RFP. DASNY is seeking a software solution that best meets the requirements set forth in the RFP. A final budget will be negotiated with the successful vendor.

13. Are there page limit requirements for the technical volume of the proposal?

Response:

No there is no page limit requirements.

14. There are a number of features that were listed in the original RFP (BID #582) that were omitted from the new RFP. Why were these removed? Would DASNY be interested in a platform that could address most of the original requested capabilities out of the box?

Response:

DASNY decided to engage a consultant for the Grants Management system through a qualification based selection process.

15. Why did DASNY not choose a vendor from the previous respondents?

Response:

DASNY decided to engage a consultant for the Grants Management system through a qualification based selection process.

16. In the previous Q&A, it was indicated that the first year cost estimate for licensing and implementation was not to exceed \$75,000. In our experience with many Grants Management solutions for the public sector, implementation alone can be 2-4x this. Can you please provide budgetary guidance?

Response:

This is a qualification based RFP. DASNY is seeking a software solution that best meets the requirements set forth in the RFP. A final budget will be negotiated with the successful vendor.

17. To help provide the best pricing possible, can we propose a solution that leverages offshore resources for configuration and any necessary code development?

Response:

The use of subconsultant/subcontractor is at the discretion of the firm.

18. We are a Salesforce implementation partner that builds Grants Management solutions on Salesforce, however we do not resell Salesforce licenses. Would DASNY be willing to procure licenses separately, through Carahsoft, should we be selected?

Response:

DASNY is seeking a firm to provide a packaged solution for the administration and management of the Grant program.

19. What are the key challenges associated with the current grants management application that you are seeking to address with the new solution?

Response:

Currently, DASNY maintains a database to log and enter processing dates for grant application. We are looking for grant management solution to provide features described in the RFP.

20. Would you please estimate the number of external users that will be accessing the portal each month?

Response:

We expect about 5,000 users to access the portal every month.

21. Is data migration still in-scope for this project?

Response:

Yes, data migration is in scope.

22. Can we please obtain Word versions of all of the RFP documents?

Response:

DASNY issues the RFP as PDF documents.

23. At a high level, when an application for a grant is submitted, what is the general workflow process (who performs what functions)?

Response:

An application goes through multiple levels of internal review including diligence, financial, environmental, bond & tax counsel, legal and others as needed. At each review step, additional information may be requested from the applicant.

24. Will we need to accommodate for scenarios where a grant would have multiple funding sources?

Response:

No.

25. Do grant managers need to track compliance reviews?

Response:

An application goes through multiple levels of internal review including diligence, financial, environmental, bond & tax counsel, legal and others as needed. At each review step, additional information may be requested from the applicant.

26. Post-award, how are grantees held responsible to the program disbursements? Should the portal become an interface point used to capture performance metrics and reporting requirements from the grantee?

Response:

This is not required at this time.

27. Is scoring/weighting criteria important (should a grant manager be able to assign weights to each application category and calculate a total weighted score based on the responses)?

Response:

This would be a desirable option for the new grant solution.

28. Will DASNY be responsible for developing training and communication materials to facilitate user self-registration and login?

Response:

Yes, DASNY will develop training material for external users.

29. In the previous Q&A it is mentioned that the required integration is a one-way data update from JD Edwards to the Grants platform. Is this still the case?

Response:

DASNY currently utilizes JD Edwards to process and record grant disbursements. Grant disbursements data is already extracted from JD Edwards. It would be desirable for the selected vendor to be able to load this data to the Grants application. This is a one-way data update. JD Edwards data extract can be sent to the vendor for a batch load process.

30. Please specify what integration services are available from JD Edwards.

Response:

DASNY currently utilizes JD Edwards to process and record grant disbursements. Grant disbursements data is already extracted from JD Edwards. It would be desirable for the selected vendor to be able to load this data to the Grants application. This is a one-way data update. JD Edwards data extract can be sent to the vendor for a batch load process.

31. Would DASNY technical staff be willing to create a daily file extract from JD Edwards to facilitate a batch integration method?

Response:

DASNY currently utilizes JD Edwards to process and record grant disbursements. Grant disbursements data is already extracted from JD Edwards. It would be desirable for the selected vendor to be able to load this data to the Grants application. This is a one-way data update. JD Edwards data extract can be sent to the vendor for a batch load process.

32. Does DASNY license a middleware solution that can bridge its firewall to the cloud in order to facilitate integration with JD Edwards or with a file? If so please name the solution and version.

Response:

DASNY currently utilizes JD Edwards to process and record grant disbursements. Grant disbursements data is already extracted from JD Edwards. It would be desirable for the selected vendor to be able to load this data to the Grants application. This is a one-way data update. JD Edwards data extract can be sent to the vendor for a batch load process.

33. How many records will be part of the data migration process? Across how many data tables do these exist in the current solution?

Response:

The current database has over 9,000 grants and 150,000 activity dates. All data related to all these grants need to be migrated to the new system.

34. For the external portal, will there will be one login/username per external organization, or many?

Response:

DASNY is open to both options.

- 1) Login accounts can be user based. Multiple users in an organization would have different accounts.
- 2) Login accounts can be organization based. Users in an organization can share an account.

35. Please describe the use-case around the need for mail-merge capability. What are the templates receiving the merge? Is this for email, or physical mail?

Response:

DASNY must create correspondence (physical mail or e-mail) throughout the review process that is provided to grantees and others. The mail merge capability is our current method for creating such correspondence from the data residing in our grant database. Other solutions may be suggested that accomplish the same goal.

36. Please elaborate on the need to “manage correspondence with stakeholders”. Who are the stakeholders? What type(s) of correspondence would you like to manage? Email? Phone calls? Document attachments?

Response:

DASNY would prefer the software to provide an interface for reviewers to keep track of phone calls and emails to/from internal & external stakeholders regarding a grant application. Other solutions may be suggested that accomplish the same goal.

37. Will file attachments be part of the data migration process? If so please estimate volume, types, and sizes.

Response:

File attachments are not part of data migration.

38. Will DASNY provide a list of the departments that will be directly impacted by the implementation?

Response:

DASNY will provide the information to the selected firm.

39. We wanted to know if you will allow any out-of-state firms the opportunity to respond and provide these services from the contractor’s location? We are willing to travel to DASNY as needed for meetings and presentations to ensure reliable communication efforts.

Response:

As long as the firm is authorized to do Business in New York State.

40. May we include any objections to the insurance requirements (E&O SIR requirement of \$100,000)?

Response:

Yes, please include any objections to the insurance requirements with supporting details/justification. DASNY will review any objections a firm may have on the insurance requirements but cannot guarantee that a change(s) will be approved.