



County of Roanoke

FINANCE DEPARTMENT PURCHASING DIVISION

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RFP #2024-023

FOIA Software

for

Roanoke County

ADDENDUM NO. 2

Answers to Questions

Due Date & Time:

November 10, 2023, 2:00PM
(Local Prevailing Time)

Addendum No. 2
RFP 2024-023
FOIA Software

1. Software solutions can vary widely depending on budget. Our firm has successfully delivered solutions across various budget ranges. To help us best meet the goals of your RFP, can you please approximate the anticipated ***first-year budget range (e.g. for the initial implementation)***? For example, is the anticipated first-year budget range:
 - a. Less than \$25,000
 - b. \$25,000 – \$50,000
 - c. \$50,000 – \$75,000
 - d. \$75,000 - \$100,000
 - e. \$100,000+ (or no range given)

Answer: No Budget number currently.

2. On a scale from 1 to 5 where 1 represents “An on-premises solution” and 5 represents “A cloud-based solution”, what best represents the ***desired*** solution on this continuum?

Answer: 4

3. How many ***internal*** users should we account for as it relates to product licensing, services scoping, etc.? approx.

Answer: 30 users, not definite

4. The document repository for the solution we would propose is Microsoft 365 (M365) / SharePoint Online (SPO). Please answer the following questions related to your use of and experience with M365/SPO:

- a. What M365 technologies are currently being used (e.g. SPO, Power Automate, etc.)?

Answer: Have SP on-prem, will migrate to SPO in approx. 6-9 mos, Going live with M365 Outlook and Office 10/30, have D365 F&O and Power Automate but only as related to use with D365 Workflows.

- b. For what workloads are you using M365/SPO (e.g. collaboration, document management, workflow)?

Answer: D365 Power automate workflows. No collab or doc mgmt related to M365 at this time.

- c. Do departments who need access to the FOIA solution currently use M365/SPO?
Answer: Only outlook and O365, SP online serves as an intranet (so not “users” but viewers)

- d. On a scale from 1 to 5 were 1 represents no Taxonomy and 5 represents a comprehensive Taxonomy including the Content Types and Term-Sets to fully support search, workflow, document management, etc., how would you rank your current SPO Taxonomy?

Answer: 1

- e. On a scale from 1 to 5 where 1 represents “None” and 5 represents “Expert”, can you please indicate what M365/SPO skills you currently have in house in terms of:

i. Infrastructure, Administration and Maintenance

Answer: 2

ii. Information Architecture Design and Implementation

Answer: 2

iii. Content Owner/Authorship

Answer: 3

iv. PowerShell and C# Development

Answer: 2

v. Power Automate and Power BI development

Answer: 1

5. If the County is currently using any Case Management or Support Ticket products (e.g. ServiceNow), please provide a list of all such products (i.e. our solution enables internal users to use either an SPO List, Dynamics 365 Case Management, or an existing commercial product providing it has APIs to add cases to the system).

Answer: We use BMC Track-IT for work order tickets, Tyler Public Safety, City Works

6. So that we can ascertain licensing and training costs related to the products below, are you *currently using* and/or do you have plans to use any of the following technologies:

- [Microsoft Dynamics](https://dynamics.microsoft.com/en-us/) (https://dynamics.microsoft.com/en-us/) and if yes, which components (e.g. Sales, Marketing, Service, Finance, HR)?

Answer: D365 F&O, no CRM

- [Microsoft Power Platform](https://powerplatform.microsoft.com/en-us/) (https://powerplatform.microsoft.com/en-us/)

Answer: Power Automate only as used with F&O (not licensed separately), 3 licenses for Power BI (for demo project only)

7. We have a FOIA product

(https://www.sharesquared.com/products/product/?name=Public+Access+Portal) that enables website visitors to submit records requests using a simple form that triggers a Power Automate workflow. By default the workflow adds the requests to Dynamics 365 Case Management module or an SPO List to be processed by internal users of the system. This workflow can be customized to do essentially anything (e.g. push information to Dynamics 365 Finance, etc.). Given this existing technology:

- a. Will the County consider a proposal to enhance what we have already built to meet the requirements specified in the RFP using the Microsoft 365 platform (e.g. Power Automate, Power BI, Dynamics 365, etc.)?

Answer: Depends on cost and amount of configuration needed, staff resources needed to change initial config

- b. Are you open to a scenario where the vendor develops the solution and trains County resources on how to maintain and enhance it thereby reducing or avoiding the ongoing software maintenance and support costs?

Answer: We prefer a solution that does not require much development or configuration. We don't have staffing to provide much ongoing maint/enhancement.

8. Regarding access to the FOIA Solution:

- a. Do you have a requirement where *unauthenticated* website visitors are able to search for records in a self-serve manner without otherwise creating an account or engaging with County staff?

Answer: Needs an account

- b. Do you envision that public records requestors will have to create an account in order to make a request beyond any records that may be available via a self-service website?

Answer: Yes

- i. If so, how do you envision the account creation process working (e.g. will internal staff create the account using the requestor's email or will account creation be more sophisticated than that)?

Answer: Should be self-service by the requestor for an in person request

9. Regarding requirements stated as "The preferred system should have the ability to be integrated with a Microsoft Outlook cloud-based email system, as well as Microsoft D365 finance software to allow for invoicing and payments, or other existing software records solutions":

Answer: (These are design questions that we need the vendor to tell us best practice for a FOIA management system, and what integrations would make the process more seamless for users and requestors.)

- a) Can you please provide use cases and additional details regarding this requirement?

Answer: We expect to need data collected from a search of our MS outlook ediscovery archive, and invoicing and payments created by documenting hours and requestor information for an invoice and automated CC payments. WE also see Outlook as a method to provide automated responses back to requestors who create an account and a request.

- b) Is actual integration in scope for the project or is the intent to ensure that the system has integration capabilities?

Answer: Would like to have functionality complete at go-live or a second phase soon after.

- c) If integration is in scope:

- i. What specific products and corresponding versions require integration?

Answer: M365 Outlook, D365, other source data systems

- ii. What level of integration is anticipated (e.g. hyperlinks only, document-level integration, unidirectional/read only, bidirectional data updates, functional integration)?

Answer: Not sure, this would depend on ease of use of the system as designed.

- iii. Do these systems have APIs that can be used to achieve the desired integration?

Answer: Not sure

10. On a scale from 1 to 5 where 1 represents a commercial-off-the-shelf (COTS) solution

with minimal configuration and 5 represents a platform-based solution requiring some professional services and customization, what is acceptable with respect to the solution you are looking for on this continuum?

Answer: 1/2

11. Please answer the following if a migration from the current FOIA solution is required as part of this solicitation:

a. What is the County currently using as its FOIA system (e.g. manufacturer, product name, version)?

Answer: We do not have a current solution (manual process in approx. 10 departments)

b. How is the data stored (e.g. in SQL Server)?

Answer: SQL is our preferred database framework

c. If the migration includes documents No migration needed

i. Approximately how many documents need to be migrated?

ii. What is the combined size in GB/TB of the documents to be migrated?

d. Can you please provide additional details so that we can estimate the content migration/conversion effort?

e. In the absence of detailed information related to the migration of legacy data, is it acceptable to provide an estimate for the analysis, planning, design, and an estimate for migration effort versus a cost for the actual migration?

12. Regarding the insurance requirement stated as "\$5,000,000 General Aggregate (other than Products/Completed Operations)"; our current General and Professional Liability Insurance limits are \$2M per claim and \$2M in aggregate, will this satisfy the requirements for this solicitation? This has been sufficient for 100's of local government customers including Los Angeles County.

Answer: Yes

13. Regarding the requirement to "provide a current annual financial report and the previous year's report"; given the sensitive nature of this information, can financial information be submitted upon shortlist or award?

Answer: This must be provided with Proposal submittal

14. If any contractor/vendor assisted with the development of this RFP or provided you with an initial evaluation, proof of concept, demonstration, pricing, or any other analysis related to this solicitation:

Answer: No Outside Assistance in RFP Prep, selection process

a. Please provide the name of all contractors and/or vendors?

Answer: N/A

b. Are these contractors and/or vendors eligible to bid on this project?

Answer: N/A

15. As an environment-conscious organization, we strive to reduce our consumption of paper and pollution, as well as printing and shipping costs, etc.; to that end, can respondents submit proposals electronically via email in lieu of hard-copy proposals?

Answer: Must provide what is requested to be in compliance with RFP

16. We typically conduct the majority of our solution delivery via virtual meetings using Microsoft Teams because this:

- Reduces the cost of the project in terms of both travel time and expenses.
- Enables us to record the sessions for review by anyone who could not attend and/or for future reference.
- Enables participants from multiple customer locations to participate independent of their location.
- Enables us to have the most qualified resource on our team conduct the session, independent of location.

Will this way of conducting project delivery meet your requirements?

Answer: We are open to remote project work, but Vendors will provide on premise presence if needed (ex: go live)

REQUIRED

Sign and return with your bid package

Sign Name:

Print Name:

Date:

Company

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