



**RFP #060624**  
**REQUEST FOR PROPOSALS**  
**for**  
**Software Solutions and Related Services for Public Sector and Education**  
**Administration**

**Proposal Due Date: June 6, 2024, 4:30 p.m., Central Time**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Software Solutions and Related Services for Public Sector and Education Administration to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://portal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than June 6, 2024, at 4:30 p.m. Central Time, and late proposals will not be considered.

**SOLICITATION SCHEDULE**

|                                 |                                                                                 |
|---------------------------------|---------------------------------------------------------------------------------|
| Public Notice of RFP Published: | April 18, 2024                                                                  |
| Pre-proposal Conference:        | May 16, 2024, 10:00 a.m., Central Time                                          |
| Question Submission Deadline:   | May 29, 2024, 4:30 p.m., Central Time                                           |
| <b>Proposal Due Date:</b>       | June 6, 2024, 4:30 p.m., Central Time<br>Late responses will not be considered. |
| Opening:                        | June 6, 2024, 4:30 p.m., Central Time<br>See RFP Section V.G. "Opening"         |

## **I. ABOUT SOURCEWELL**

### **A. SOURCEWELL**

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada. Sourcewell's solicitation process complies with State of Minnesota law and policies, conforms to Canadian trade agreements (including Canadian Free Trade Agreement, Ontario-Quebec Trade and Cooperation Agreement, and Canada-European Union Comprehensive Economic and Trade Agreement, as applicable), and results in cooperative purchasing solutions from which Sourcewell's Participating Entities procure equipment, products, and services.

Cooperative purchasing provides participating entities and suppliers increased administrative efficiencies and the power of combined purchasing volume that result in overall cost savings. At times, Sourcewell also partners with other purchasing cooperatives to combine the purchasing volume of their membership into a single solicitation and contract expanding the reach of contracted suppliers' potential pool of end users.

Sourcewell uses a website-based platform, the Sourcewell Procurement Portal, through which all proposals to this RFP must be submitted.

### **B. USE OF RESULTING CONTRACTS**

In the United States, Sourcewell's contracts are available for use by:

- Federal and state government entities<sup>1</sup>;
- Cities, towns, and counties/parishes;
- Education service cooperatives;
- K-12 and higher education entities;
- Tribal government entities;
- Some nonprofit entities; and
- Other public entities.

In Canada, Sourcewell's contracts are available for use by:

- Provincial and territorial government departments, ministries, agencies, boards, councils, committees, commissions, and similar agencies;
- Indigenous self-governing bodies;
- Regional, local, district, and other forms of municipal government, municipal organizations, school boards, and publicly funded academic, health, and social service

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<sup>1</sup> Pursuant to HAR §3-128-2, the State of Hawaii, Department of Accounting and General Services, State Procurement Office, on behalf of the State of Hawaii and participating jurisdictions, has provided notice of its Intent to Participate in the solicitation as a participating entity.

entities referred to as MASH sector (this should be construed to include but not be limited to the Cities of Calgary, Edmonton, Toronto, Ottawa, and Winnipeg), as well as any corporation or entity owned or controlled by one or more of the preceding entities;

- Crown corporations, government enterprises, and other entities that are owned or controlled by these entities through ownership interest; and
- Members of the Canoe procurement group of Canada, and their partner associations: Canoe members are regional, local, district or other forms of municipal government, school boards, publicly-funded academic, health and social service entities in Alberta and across Canada, as well as any corporation or entity owned or controlled by one or more of the preceding entities – as well as partner associations, including Saskatchewan Association of Rural Municipalities, Association of Manitoba Municipalities, Local Authorities Services/Association of Municipalities Ontario, Nova Scotia Federation of Municipalities, Federation of Prince Edward Island Municipalities, Municipalities Newfoundland Labrador, Union of New Brunswick Municipalities, North West Territories Association of Communities, CivicInfo BC, and their members.

For a listing of current United States and Canadian Participating Entities visit Sourcewell's website (note: there is a tab for each country): <https://www.sourcewell-mn.gov/sourcewell-for-vendors/agency-locator>.

Participating Entities typically access contracted equipment, products, or services through a purchase order issued directly to the contracted supplier. A Participating Entity may request additional terms or conditions related to a purchase. Use of Sourcewell contracts is voluntary and Participating Entities retain the right to obtain similar equipment, products, or services from other sources.

To meet Participating Entities' needs, Sourcewell broadly publishes public notice of all solicitation opportunities, including this RFP. In addition, where applicable, other purchasing cooperatives and procurement officials receive notice and are encouraged to re-post the solicitation opportunity.

Proof of publication will be available at the conclusion of the solicitation process.

## **II. SOLICITATION DETAILS**

### **A. SOLUTIONS-BASED SOLICITATION**

This RFP and contract award process is a solutions-based solicitation; meaning that Sourcewell is seeking equipment, products, or services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by law or industry standards.

## B. REQUESTED EQUIPMENT, PRODUCTS, OR SERVICES

It is expected that proposers will offer a wide array of equipment, products, or services at lower prices and with better value than what they would ordinarily offer to a single government entity, a school district, or a regional cooperative.

1. Sourcewell is seeking proposals to include Software Solutions and Related Services for Public Sector and Education Administration, including standalone software, Software-as-a-Service (SaaS), and cloud-based platforms of the following types:

### Category 1: Core Administrative Systems

- a. Human Resources Software;
- b. Financial Performance, Spend, or Expense Management Software;
- c. Accounts Payable, Accounts Receivable, Billing, or Revenue Collection Solutions; and
- d. Procure-to-Pay and Contract Management Systems.

### Category 2: Education and Public Sector Information and Work Management

- a. Student Information System (SIS);
- b. Learning Management System (LMS);
- c. Work Management Software;
- d. Enterprise Content Management/Records Management; and
- e. Enrollment Management Systems.

### Category 3: Asset and Risk Management

- a. Computerized Maintenance Management System (CMMS);
- b. Facility Management Software;
- c. Energy Management Software;
- d. Insurance and Risk Management; and
- e. Environmental, Health, and Safety (EHS) management.

### Category 4: Public Engagement and Specialized Services

- a. Court, Corrections, and Justice System;
- b. Municipal Services, Inspections, Licensing, Grants, Tax, and Permitting Management Solutions;
- c. Parks and Recreation Software; and
- d. Citizen Relationship/Engagement Management

### Category 5: Integrated Enterprise Solutions

- a. Comprehensive suites that encompass Enterprise Resource Planning (ERP) **and at least one solution** from **EACH category** 1-4 above.

With offerings in categories 1-5, proposers are encouraged to bring in related solutions such as those listed below:

- a. Equipment and accessories related to the offering of systems or solutions described in subsections categories 1-5 above, including but not limited to, hardware, peripherals, and accessories; and
- b. Services related to the offering of systems or solutions described in categories 1-5 above, including, but not limited to, hosting, cloud migration, modernization, customization, integration, implementation, installation, maintenance, training, data collection, import, export and backup, record-keeping and reporting, mobile, cloud, and web-based applications or platforms, customer service, auditing, compliance, security, and technical and user support.

Proposers may include related equipment, accessories, and services to the extent that these solutions are ancillary or complementary to the equipment, products, or services being proposed.

2. The primary focus of this solicitation is on Public Sector and Education Administration Software Solutions with Related Services. This solicitation should NOT be construed to include:

- a. Implementation-only services.
- b. Equipment, accessories, or hardware-only solutions.

3. This solicitation does not include those equipment, products, or services covered under categories included in pending or planned Sourcewell solicitations or in contracts currently maintained by Sourcewell, identified below:

- a. Facility Security Systems, Equipment, and Software with Related Services (RFP #030421); and,
- b. Public Safety Video Surveillance Solutions with Related Equipment, Software and Accessories (RFP #101223).

Generally, the solutions for Participating Entities are turn-key solutions, providing a combination of equipment, products and services, delivery, and installation to a properly operating status. However, equipment-only or products-only solutions may be appropriate for situations where Participating Entities possess the ability, either in-house or through local third-party contractors, to properly install and bring to operation the equipment or products being proposed.

Sourcewell prefers suppliers that provide a sole source of responsibility for the equipment, products, and services provided under a resulting contract. If proposer is including the equipment, products, and services of its subsidiary entities, the proposer must also identify all included subsidiaries in its proposal. If proposer requires the use of distributors, dealers, resellers, or subcontractors to provide the equipment, products, or services, the proposal must address how the equipment, products or services will be provided to Participating Entities, and

describe the network of distributors, dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract.

Sourcwell encourages suppliers to offer the broadest possible selection of equipment, products, and services being proposed over the largest possible geographic area and to the largest possible cross-section of Sourcwell current and future Participating Entities.

#### C. REQUIREMENTS

It is expected that proposers have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the equipment, products, or services to Participating Entities.

1. Safety Requirements. All items proposed must comply with current applicable safety or regulatory standards or codes.
2. Deviation from Industry Standard. Deviations from industry standards must be identified with an explanation of how the equipment, products, and services will provide equivalent function, coverage, performance, and/or related services.
3. New Equipment and Products. Proposed equipment and products must be for new, current model; however, proposer may offer certain close-out equipment or products if it is specifically noted in the Pricing proposal.
4. Delivered and operational. Unless clearly noted in the proposal, equipment and products must be delivered to the Participating Entity as operational.
5. Warranty. All equipment, products, supplies, and services must be covered by a warranty that is the industry standard or better.

#### D. PROSPECTIVE CONTRACT TERM

The term of any resulting contract(s) awarded by Sourcwell under this solicitation will be four years. Sourcwell and supplier may agree to up to three additional one-year extensions based on the best interests of Sourcwell and its Participating Entities. Sourcwell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

#### E. ESTIMATED CONTRACT VALUE AND USAGE

Based on past volume of similar contracts, the estimated annual value of all transactions from contracts resulting from this RFP are anticipated to be USD 50 Million; therefore, proposers are expected to propose volume pricing. Sourcwell anticipates considerable activity under the contract(s) awarded from this RFP; however, sales and sales volume from any resulting contract are not guaranteed.

## F. MARKETING PLAN

Proposer's sales force will be the primary source of communication with Participating Entities. The proposer's Marketing Plan should demonstrate proposer's ability to deploy a sales force or dealer network to Participating Entities, as well as proposer's sales and service capabilities. It is expected that proposer will promote and market any contract award.

## G. ADDITIONAL CONSIDERATIONS

1. Contracts will be awarded to proposers able to best meet the need of Participating Entities. Proposers should submit their complete line of equipment, products, or services that are applicable to the scope of this RFP.
2. A proposer may submit only one proposal. If related, affiliated, or subsidiary entities elect to submit separate proposals, rather than a single parent-entity proposal, each such proposal must be prepared independently and without cooperation, collaboration, or collusion.
3. If a proposer works with a consultant on its proposal, the consultant (an individual or company) may not assist any other entity with a proposal for this solicitation.
4. Proposers should include all relevant information in its proposal, since Sourcewell cannot consider information that is not included in the proposal. Sourcewell reserves the right to verify proposer's information and may request clarification from a proposer, including samples of the proposed equipment or products.
5. Proposers including solutions offered within the scope of Categories 1, 2, 3, and 4 within its singular proposal must designate they are seeking award in Category 5 in the Sourcewell Procurement Portal. Proposers seeking award in Category 1, 2, 3, or 4, as defined herein must make that designation in the Sourcewell Procurement Portal. Proposers may only receive an award within the Category(-ies) they designate. Sourcewell reserves the right to re-categorize any designation as it deems appropriate.
6. A proposer's documented negative past performance with Sourcewell or its Participating Entities occurring under a previously awarded Sourcewell contract may be considered in the evaluation of a proposal.

## III. PRICING

### A. REQUIREMENTS

All proposed pricing must be:

1. Either Line-Item Pricing or Percentage Discount from Catalog Pricing, or a combination of these:
  - a. **Line-item Pricing** is pricing based on each individual product or services. Each line must indicate the proposer's published "List Price," as well as the "Contract Price."
  - b. **Percentage Discount from Catalog or Category** is based on a percentage discount from a catalog or list price, defined as a published Manufacturer's Suggested Retail Price

(MSRP) for the products or services. Individualized percentage discounts can be applied to any number of defined product groupings. Proposers will be responsible for providing and maintaining current published MSRP with Sourcewell, and this pricing must be included in its proposal and provided throughout the term of any contract resulting from this RFP.

2. The proposer's not to exceed price. A not to exceed price is the highest price for which equipment, products, or services may be billed to a Participating Entity. However, it is permissible for suppliers to sell at a price that is lower than the contracted price.
3. Stated in U.S. and Canadian dollars (as applicable).
4. Clearly understandable, complete, and fully describe the total cost of acquisition (e.g., the cost of the proposed equipment, products, and services delivered and operational for its intended purpose in the Participating Entity's location).

Proposers should clearly identify any costs that are NOT included in the proposed product or service pricing. This may include items such as installation, set up, mandatory training, or initial inspection. Include identification of any parties that impose such costs and their relationship to the proposer. Additionally, proposers should clearly describe any unique distribution and/or delivery methods or options offered in the proposal.

#### **B. ADMINISTRATIVE FEES**

Proposers awarded a contract are expected to pay to Sourcewell an administrative fee in exchange for Sourcewell facilitating the resulting contracts. The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all contracted equipment, products, or services made during a calendar quarter, and is typically one percent (1%) to two percent (2%). In some categories, a flat fee may be an acceptable alternative.

### **IV. CONTRACT**

Proposers awarded a contract will be required to execute a contract with Sourcewell (see attached template). Only those modifications the proposer indicates in its proposal will be available for discussion. Much of the language in the Contract reflects Minnesota legal requirements and cannot be altered. Numerous and/or onerous exceptions that contradict Minnesota law may result in the proposal being disqualified from further review and evaluation.

To identify any exception, or to request any modification, to Sourcewell's standard Contract terms, conditions, or specifications, a proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided in the "Documents" section of the "Bid Details" page on the Sourcewell Procurement Portal and uploaded as part of its response. Only those exceptions noted at the time of the proposal submission will be considered.

Exceptions must:

1. Clearly identify the affected article and section.

2. Clearly note the requested modification; and as applicable, provide requested alternative language.

Unclear requests will be automatically denied.

Only those exceptions that have been accepted by Sourcewell will be included in the contract document provided to the awarded supplier for signature.

If a proposer receives a contract award resulting from this solicitation it will have up to 30 days to sign and return the contract. After that time, at Sourcewell's sole discretion, the contract award may be revoked.

## **V. RFP PROCESS**

### **A. PRE-PROPOSAL CONFERENCE**

Sourcewell will hold an optional, non-mandatory pre-proposal conference via webcast on the date and time noted in the Solicitation Schedule for this RFP and on the Sourcewell Procurement Portal. The purpose of this conference is to allow potential proposers to ask questions regarding this RFP and Sourcewell's competitive contracting process. Information about the webcast will be sent to all entities that have registered for this solicitation opportunity through their Sourcewell Procurement Portal Vendor Account. Pre-proposal conference attendance is optional.

### **B. QUESTIONS REGARDING THIS RFP AND ORAL COMMUNICATION**

All questions regarding this RFP must be submitted through the Sourcewell Procurement Portal. The deadline for submission of questions is found in the Solicitation Schedule and on the Sourcewell Procurement Portal. Answers to questions will be issued through an addendum to this RFP. Repetitive questions will be summarized into a single answer and identifying information will be removed from the submitted questions.

All questions, whether specific to a proposer or generally related to the RFP, must be submitted using this process. Do not contact individual Sourcewell staff to ask questions or request information as this may disqualify the proposer from responding to this RFP. Sourcewell will not respond to questions submitted after the deadline.

### **C. ADDENDA**

Sourcewell may modify this RFP at any time prior to the proposal due date by issuing an addendum. Addenda issued by Sourcewell become a part of the RFP and will be delivered to potential proposers through the Sourcewell Procurement Portal. Sourcewell accepts no liability in connection with the delivery of any addenda.

Before a proposal will be accepted through the Sourcewell Procurement Portal, all addenda, if any, must be acknowledged by the proposer by checking the box for each addendum. It is the responsibility of the proposer to check for any addenda that may have been issued up to the solicitation due date and time.

If an addendum is issued after a proposer submitted its proposal, the Sourcewell Procurement Portal will WITHDRAW the submission and change the proposer's proposal status to INCOMPLETE. The proposer can view this status change in the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account. The proposer is solely responsible to check the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account periodically after submitting its proposal (and up to the Proposal Due Date). If the proposer's proposal status has changed to INCOMPLETE, the proposer is solely responsible to:

- i) make any required adjustments to its proposal;
- ii) acknowledge the addenda; and
- iii) ensure the re-submitted proposal is received through the Sourcewell Procurement Portal no later than the Proposal Due Date and time shown in the Solicitation Schedule above.

#### D. PROPOSAL SUBMISSION

Proposer's complete proposal must be submitted through the Sourcewell Procurement Portal no later than the date and time specified in the Solicitation Schedule. Any other form of proposal submission, whether electronic, paper, or otherwise, will not be considered by Sourcewell. **Late proposals will not be considered.** It is the proposer's sole responsibility to ensure that the proposal is received on time.

It is recommended that proposers allow sufficient time to upload the proposal and to resolve any issues that may arise. The time and date that a proposal is received by Sourcewell is solely determined by the Sourcewell Procurement Portal web clock.

In the event of problems with the Sourcewell Procurement Portal, follow the instructions for technical support posted in the portal. It may take up to 24 hours to respond to certain issues.

Upon successful submission of a proposal, the Sourcewell Procurement Portal will automatically generate a confirmation email to the proposer. If the proposer does not receive a confirmation email, contact Sourcewell's support provider at [support@bidsandtenders.ca](mailto:support@bidsandtenders.ca).

To ensure receipt of the latest information and updates via email regarding this solicitation, or if the proposer has obtained this solicitation document from a third party, the onus is on the proposer to create a Sourcewell Procurement Portal Vendor Account and register for this solicitation opportunity.

Within the Sourcewell Procurement Portal, all proposals must be digitally acknowledged by an authorized representative of the proposer attesting that the information contained in the proposal is true and accurate. By submitting a proposal, proposer warrants that the information

provided is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate, misleading, or false information is grounds for disqualification from a contract award and may subject the proposer to remedies available by law.

#### E. GENERAL PROPOSAL REQUIREMENTS

Proposals must be:

- In substantial compliance with the requirements of this RFP or it will be considered nonresponsive and be rejected.
- Complete. A proposal will be rejected if it is conditional or incomplete.
- Submitted in English.
- Valid and irrevocable for 90 days following the Proposal Due Date.

Any and all costs incurred in responding to this RFP will be borne by the proposer.

#### F. PROPOSAL WITHDRAWAL

Prior to the proposal deadline, a proposer may withdraw its proposal.

#### G. OPENING

The Opening of proposals will be conducted in the Sourcewell Procurement Portal immediately following the proposal due date and time. To view the list of proposers resulting from the opening, verify that the Sourcewell Procurement Portal opportunities list search is set to “All” or “Closed.”

Members of the public may attend the Opening at Sourcewell’s office located at 202 12th Street NE, Staples, MN to hear the results.

### **VI. EVALUATION AND AWARD**

#### A. EVALUATION

It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers offering the best overall quality, selection of equipment, products, and services, and price that meet the commonly requested specifications of Sourcewell and its Participating Entities. The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities.

Factors to be considered in determining the number of contracts to be awarded in any category may include the following:

- Total evaluation scores (giving consideration to natural breaks in the scoring of responsive proposals);

- The number and geographic location of highest-scoring proposers that offer:
  - A comprehensive selection of the requested equipment, products, or services;
  - A sales and service network ensuring availability and coverage for Participating Entities' use; and
  - Other attributes of the proposer or contents of its proposal that assist Participating Entities in achieving environmental and social requirements, and goals.

Information submitted as part of a proposal should be as specific as possible when responding to the RFP. Do not assume Sourcewell has any knowledge about a specific supplier or product.

#### B. AWARD(S)

Award(s) will be made to the highest-scoring proposer(s) whose proposal conforms to all conditions and requirements of the RFP, and consistent with the award criteria defined in this RFP.

Sourcewell may request written clarification of a proposal at any time during the evaluation process.

Proposal evaluation will be based on the following scoring criteria and the Sourcewell Evaluator Scoring Guide (a copy is available in the Sourcewell Procurement Portal):

|                                                               |             |
|---------------------------------------------------------------|-------------|
| Conformance to RFP Requirements                               | 50          |
| Financial Viability and Marketplace Success                   | 75          |
| Ability to Sell and Deliver Service                           | 100         |
| Marketing Plan                                                | 50          |
| Value Added Attributes                                        | 75          |
| Warranty                                                      | 50          |
| Depth and Breadth of Offered Equipment, Products, or Services | 200         |
| Pricing                                                       | 400         |
| <b>TOTAL POINTS</b>                                           | <b>1000</b> |

#### C. PROTESTS OF AWARDS

Any protest made under this RFP by a proposer must be in writing, addressed to Sourcewell's Executive Director, and delivered to the Sourcewell office located at 202 12th Street NE, P.O. Box 219, Staples, MN 56479. All documents that comprise the complete protest package must be received, and time stamped at the Sourcewell office by 4:30 p.m., Central Time, no later than 10 calendar days following Sourcewell's notice of contract award(s) or non-award. A protest must allege a procedural, technical, or legal defect, with supporting documentation. A protest that merely requests a re-evaluation of a proposal's content will not be entertained.

A protest must include the following items:

- The name, address, and telephone number of the protester;

- Identification of the solicitation by RFP number;
- A precise statement of the relevant facts;
- Identification of the alleged procedural, technical, or legal defect;
- Analysis of the basis for the protest;
- Any additional supporting documentation;
- The original signature of the protester or its representative; and
- Protest bond in the amount of \$20,000 (except where prohibited by law or treaty).

Protests that do not address these elements will not be reviewed.

#### D. RIGHTS RESERVED

This RFP does not commit Sourcewell to award any contract, and a proposal may be rejected if it is nonresponsive, conditional, incomplete, conflicting, or misleading. Proposals that contain false statements or do not support an attribute or condition stated by the proposer may be rejected.

Sourcewell reserves the right to:

- Modify or cancel this RFP at any time;
- Reject any and all proposals received;
- Reject proposals that do not comply with the provisions of this RFP;
- Select, for contracts or for discussion, a proposal other than that with the lowest cost;
- Independently verify any information provided in a proposal;
- Disqualify any proposer that does not meet the requirements of this RFP, is debarred or suspended by the United States or Canada, State of Minnesota, Participating Entity's state or province; has an officer, or other key personnel, who have been charged with a serious crime; or is bankrupt, insolvent, or where bankruptcy or insolvency are a reasonable prospect;
- Waive or modify any informalities, irregularities, or inconsistencies in the proposals received;
- Clarify any part of a proposal and discuss any aspect of the proposal with any proposer; and negotiate with more than one proposer;
- Award a contract if only one responsive proposal is received if it is in the best interest of Participating Entities; and
- Award a contract to one or more proposers if it is in the best interest of Participating Entities.

#### E. DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591, after negotiations are complete. Sourcewell considers that negotiations are complete upon execution of a resulting contract. It is the proposer's responsibility to clearly identify any data submitted that

it considers to be protected. Proposer must also include a justification for the classification citing the applicable Minnesota law. Sourcewell may reject proposals that are marked confidential or nonpublic, either substantially or in their entirety.

Sourcewell will not consider the prices submitted by the proposer to be confidential, proprietary, or trade secret materials. Financial information, including financial statements, provided by a proposer is not considered trade secret under the statutory definition.



4/19/2024

Addendum No. 1

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Do we have to submit for each core category if our software meets more than one of the requirements? For example, we can cover 3 items in category 3, but only 1 item in category 2.

**Answer 1:**

The Sourcewell solicitation is an open competitive process. A proposer can respond to every category their products fit into to be considered for award. Each proposal is evaluated based on the criteria stated in the RFP.

**Question 2:**

Will there be a recorded session of the bidder's conference?

**Answer 1:**

See Section V. RFP Process, A. Pre-Proposal Conference. This conference is optional and a recording will be sent to all registered plan holders after it is completed.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 4/19/2024, is required at the time of proposal submittal.



4/22/2024

Addendum No. 2

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

We acknowledge in B. 3. It states the solicitation does not include those equipment, products, or services covered under categories included in pending or planned Sourcewell solicitations or in contracts currently maintained by Sourcewell. In Sourcewell contract #051123-Fleet Electrification Transition Planning, Management, and Related Services, a number of awarded contracts included the provision of EV charge management software.

Can you please confirm what the criteria is for Energy Management Software as it relates to Category 3 of this solicitation? Is EV charge management software able to be provided by this contract?

**Answer 1:**

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 4/22/2024, is required at the time of proposal submittal.



4/30/2024

Addendum No. 3

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

If a vendor does not propose to make services available under this contract in Canada now, is there an option to expand in the future during contract term to allow it?

**Answer 1:**

A proposer is not required to cover every geographic region to be considered for an award. Refer to the Sourcewell contract template for additional details on the process for adding new products, services, and coverage after award. An addendum to the contract would need to be signed by both parties to add Canada to the contract. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 4/30/2024, is required at the time of proposal submittal.



5/2/2024

Addendum No. 4

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Our company is registered in another country. Is it possible to offer our solutions via our Proposal or non-resident countries aren't [sic] be qualified to submit proposals? Is Sourcewell able to sign contracts and agreements with companies from other continents for this RFP?

**Answer 1:**

Sourcewell can contract with a foreign supplier. It is left to the discretion of each proposer to demonstrate how they will effectively deliver the goods and services offered in their proposal. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/2/2024, is required at the time of proposal submittal.



5/3/2024

Addendum No. 5

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

I have noticed that contact e-mails and client phone numbers can be listed publicly on your website for those who are successful. Is it possible to include this information on a separate document that is not public facing but can be obtained in another way by perceptive clients. My concern is our clients might get spammed by others simply visiting your website.

**Answer 1:**

Sourcewell's participating agencies', also known as clients, contact information, such as emails or phone numbers, are not located on our website. Sourcewell's awarded suppliers typically have a contact listed with an email and phone number. This allows our participating agencies to reach out to those suppliers, get a quote, and make a purchase. To date, we have not been made aware of any spamming activities related to the contact information being shared on our website. If that does become an issue, Sourcewell will address it at that time.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/3/2024, is required at the time of proposal submittal.



5/7/2024

Addendum No. 6

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

We do business in some of the areas served by Sourcewell. If we are awarded for this RFP will those sales be subject to the Sourcewell commission and vendor agreement terms?

**Answer 1:**

A participating agency is not required to use our contract. If the Sourcewell participating agency wishes to use the Sourcewell contract, it will be subject to the terms and conditions of the contract.

**Question 2:**

Will we be able to sell to States and districts in the Sourcewell member areas outside of this vendor agreement?

**Answer 2:**

An awarded supplier is not required to use our contract if they are awarded.

**Question 3:**

Please clarify line item 25. What is being required for an answer to size of the transaction question?

**Answer 3:**

In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine the information

necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/7/2024, is required at the time of proposal submittal.



5/8/2024

Addendum No. 7

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

For references it states they need to be-eligible to be Sourcewell participating entities. Does that mean they just need to be willing to be contacted by the RFP committed? What is the level of participation from the reference?

**Answer 1:**

To see who is eligible to participate in Sourcewell see RFP 1. B. Use of Resulting Contracts. In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine the information they are willing to include and what is necessary to best demonstrate their marketplace success. Sourcewell reserves the right to contact any or all of the references provided. Proposals are evaluated according to the scoring criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/8/2024, is required at the time of proposal submittal.



5/9/2024

Addendum No. 8

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

How do we access the pre-bid conference?

**Answer 1:**

Registered plan takers will receive log-in instructions via email approximately two business days prior to the online Pre-Proposal conference.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/9/2024, is required at the time of proposal submittal.



5/14/2024

Addendum No. 9

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

The answers to questions in tables 6-11 are supposed to reflect information through the lens of the product offered (category 1-5) or just general information and practices of the company applying?

**Answer 1:**

In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine and propose the approach that aligns with their business methods and satisfies all the requirements of the RFP. Proposals are evaluated based on the criteria stated in the RFP.

**Question 2:**

Do the offered services (b.) have to be connected to category 1-5 platforms/SaaS or they can be separate services offered by the company (cloud migration, reporting, modernization, etc.)

**Answer 2:**

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract

awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

**Question 3:**

Will there be an opportunity in the future for custom software development companies?

**Answer 3:**

All RFPs now and in the future will be posted on the Procurement Portal.

**Question 4:**

In table 7, Marketing Plan, question no. 40 - Are your products or services available through an e-procurement ordering process?, could you please elaborate on what is meant by e-procurement ordering process?

**Answer 4:**

In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine and propose the approach that aligns with their business methods and satisfies all the requirements of the RFP. Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/14/2024, is required at the time of proposal submittal.



5/16/2024

Addendum No. 10

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Is there a specific set of requirements for a given category that vendors should respond to? Or a given format of response that you expect vendors to adhere to?

**Answer 1:**

It is left to the Proposer's discretion to determine the Proposal content and format that best aligns with Proposer's offerings, and that conforms to the guidance in the RFP and the directions provided within the Sourcewell Procurement Portal. Proposals will be evaluated based on the criteria stated in the RFP.

**Question 2:**

We do not sell software packages or equipment. We are an IT professional services company. As I am filling out the online form, I am unsure of whether to answer yes or no on Tables 14 through 19. It seems I should answer no, then go into detail in our offering on Table 20. Is this correct?

**Answer 2:**

Review the RFP Section II. B. Requested Equipment, Products, or Services. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in

any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

**Question 3:**

How many ERP Contracts have been sourced through Sourcewell in the last 5 years? And what is the value of those contracts?

**Answer 3:**

Each RFP is an opportunity independent of any other prior, current or future Sourcewell solicitation. Refer also to RFP Section II. E. Estimated Contract Value and Usage - "Sourcewell anticipates considerable activity under the contracts(s) awarded from this RFP; however, sales and sales volume from any resulting contract are not guaranteed." The number of sales through the 090320 Public Administration Software awarded contracts is 81 Million, which is currently reported from 1.7k agencies.

**Question 4:**

What states does Sourcewell cover?

**Answer 4:**

Refer to RFP Section I. B. Use of Resulting Contracts for what entities can use Sourcewell's contract.

**Question 5:**

If we only submit in 1 category, how does that effect scoring?

**Answer 5:**

Refer to RFP Article VI. – Evaluation and Award - for details on the proposal scoring criteria. Additional guidance can be found in the "Sourcewell Evaluator Scoring Guide" found on the "Bids Homepage" in the Resource Materials section of the Sourcewell Procurement Portal.

**Question 6:**

Is it acceptable to limit the scope of our proposal to the United States?

**Answer 6:**

See Addendum 3, Question 1.

**Question 7:**

We provide a cloud service product and with it we provide an ancillary, body worn camera. There is no charge for the camera, nor is it sold as a standalone item without the cloud subscription. Can we offer this ancillary product and not fall under the “Public Safety Video Surveillance Solutions with Related Equipment, Software and Accessories (RFP #101223)”?

**Answer 7:**

See Answer 2.

**Question 8:**

In section 3 (Pricing) of the Contract Template, what is meant by “the payment method”?

**Answer 8:**

The payment method refers to how the vendor will be paid by the participating agency. This is also discussed in Table 10, Question 65 of the RFP Questionnaire.

**Question 9:**

In section 6 (Participating Entity Use and Purchasing) (and other sections) of the Contract Template, it references order flow. Will vendors have the opportunity to include the vendor’s standard ordering process, which includes an ordering document mutually agreed upon with the participating entity?

**Answer 9:**

Review the RFP Questionnaire Table 6, Question 30 to describe your order process and Table 10, Question 67 which discusses standard transaction documents.

**Question 10:**

Our organization provides student transportation routing software, which does not seem to fit in any of the sub-categories noted in this RFP for ‘Software solutions and related services for public sector and education administration.’ Would our product/services be a better scope fit with the ‘Fleet Management Technologies with Related Software Solutions’ RFP #020221 that I believe will be issued in 2025? Or is there another RFP category that is more appropriate? We don’t want to waste the evaluation committee’s time by submitting a response for services not in scope.

**Answer 10:**

See Answer 2.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/16/2024, is required at the time of proposal submittal.



5/17/2024

Addendum No. 11

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

If one of our software solutions fits multiple categories that are in different sections, can we list that software solution in each category we feel it falls within or must we limit each software solution we offer to a single category? Our goal is that if we aren't awarded in one category for that specific software solution it may be possible it could get awarded in a different category.

**Answer 1:**

It is left to the Proposer's discretion to determine the Proposal content and format that best aligns with Proposer's offerings. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

**Question 2:**

Due to approvals we are required to seek from the manufacturer/CSP in order to respond with their offerings on a contract such as this and the time frame required for those approvals to be received, we kindly request a 3 week extension to 6/27/24.

**Answer 2:**

No extension of the due date is contemplated by Sourcewell at this time.

**Question 3:**

We're a PMIS (Project Management Integrated System) and we fit into all 4 categories but we are not an ERP. PMIS feels like it should be its own category, would you make a sub-category for PMIS? If not please guide us into the right category or let us know if PMIS is out of scope for this RFP.

**Answer 3:**

A Proposer can respond to any categories in 1-4; if a Proposer wants to respond to Category 5, they must have an Enterprise Resource Planning (ERP) system AND at least one solution in EACH Category 1-4. To respond to any combination of solutions in Categories 1-4 you do not need an ERP solution.

We are not planning on changing the set Categories at this time. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/17/2024, is required at the time of proposal submittal.



5/20/2024

Addendum No. 12

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Can you please confirm the character/word limit for each question?

**Answer 1:**

There is sufficient space for the proposer to provide a brief but thorough response to each question. The platform designer indicates the character limit of a text field is 32,000. The text boxes do not support the insertion of images or graphics.

**Question 2:**

Can you please clarify questions 14 and 15? Does it refer to the market share the company has in the US and CA markets, or does it refer to the market share of the industry we are applying for in this solicitation?

**Answer 2:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. So, it is left to the discretion of each proposer to determine the information necessary to best demonstrate their industry recognition and marketplace success. The solicitation is a competitive process, and proposals are evaluated on the content submitted.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/20/2024, is required at the time of proposal submittal.



5/21/2024

Addendum No. 13

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Under Table 5 can you provide further details on what is required for the column size of transactions? Is this a dollar value or amount of transactions being processed?

**Answer 1:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. So, it is left to the discretion of each proposer to determine the information necessary to best demonstrate their industry recognition and marketplace success. The solicitation is a competitive process, and proposals are evaluated on the content submitted.

**Question 2:**

Under table 5 can you provide further details on what is required for the dollar volume past three years? Is this a cumulative total or a total for each year for the last three years? Is this GMV total?

**Answer 2:**

See the answer to Question 1.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/21/2024, is required at the time of proposal submittal.



5/24/2024

Addendum No. 14

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

What was the average deal size for each buyer in 2023?

**Answer 1:**

Refer to Addendum 10, Question 3.

**Question 2:**

Do approved vendors have the option to decline offers to purchase from prospective buyers?

**Answer 2:**

Refer to Contract Template Section 5. Participation, Contract Access, and Participating Entity Requirements, "The benefits of this Contract should be available to all Participating Entities that can legally access the Equipment, Products, or Services under this Contract. A Participating Entity's authority to access this Contract is determined through its cooperative purchasing, interlocal, or joint powers laws. Any entity accessing benefits of this Contract will be considered a Service Member of Sourcewell during such time of access. Supplier understands that a Participating Entity's use of this Contract is at the Participating Entity's sole convenience and Participating Entities reserve the right to obtain like Equipment, Products, or Services from any other source."

**Question 3:**

In 2023, how many agencies/schools in the US and Canada actually procured services through the 5 categories listed?

**Answer 3:**

Refer to Addendum 10, Question 3.

**Question 4:**

If a Participating Entity must terminate an order under the Termination of Orders section in the Contract, will they still be able to remit payment for any portion of the services completed by Supplier?

**Answer 4:**

Refer to Contract Template Section 1. Term of Contract, B. Survival of Terms, "Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract."

**Question 5:**

Can Sourcewell provide a copy of the requirements for which suppliers must comply with under the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as stated in the contract template in Section 12: Government Data Practices.

**Answer 5:**

Refer to RFP Section VI. Evaluation and Award, E. Disposition of Proposals," All materials submitted in response to this RFP will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591, after negotiations are complete. Sourcewell considers that negotiations are complete upon execution of a resulting contract. It is the proposer's responsibility to clearly identify any data submitted that it considers to be protected. Proposer must also include a justification for the classification citing the applicable Minnesota law. Sourcewell may reject proposals that are marked confidential or nonpublic, either substantially or in their entirety.

Sourcewell will not consider the prices submitted by the proposer to be confidential, proprietary, or trade secret materials. Financial information, including financial statements, provided by a proposer is not considered trade secret under the statutory definition.

**Question 6:**

Would Sourcewell consider a 2-week extension?

**Answer 6:**

With the availability of the Sourcewell Procurement Portal allowing for 24/7 remote access, extensions are not typically deemed necessary.

**Question 7:**

How often do you refresh your vendor list/release category RFPs to update solution options?

**Answer 7:**

Sourcewell updates their website as contracts change. The average contract term is 4 years.

**Question 8:**

Does Sourcewell entertain applications outside of the RFP process?

**Answer 8:**

All proposals must be submitted through the Sourcewell Procurement Portal. Guidance on preparing a response in the Portal can be found in the "Submit Response Guide" and the "Sourcewell Evaluator Scoring Guide" located on the "Bids Homepage" in the Resource Materials section. Additional guidance specific to the RFP will be offered during the Pre-Proposal Conference.

**Question 9:**

Are there any Fedramp or Stateramp requirements?

**Answer 9:**

Refer to the RFP and the Contract Template for legal requirements of this opportunity.

**Question 10:**

Can you explain where the CAGE code / Unique Entity Identifier (SAM) can be located?

**Answer 10:**

The Commercial and Government Entity Code, or **CAGE Code**, is a unique identifier assigned to suppliers to various government or defense agencies, as well as to government agencies themselves and various organizations. CAGE codes provide a

standardized method of identifying a given facility at a specific location. The Unique Entity ID is generated in SAM.gov. If you are registered in SAM.gov (active or not), you already have a Unique Entity ID. It is viewable at SAM.gov. If you are new to SAM.gov and will be registering for the first time, you will get your Unique Entity ID (SAM) during registration. A CAGE or Unique Entity Identifier (SAM) code is not required to be considered for or awarded a Sourcewell contract. Proposals are evaluated based on the criteria as stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/24/2024, is required at the time of proposal submittal.



5/28/2024

Addendum No. 15

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Could you clarify what parts of our submitted RFP will be publicly available upon award? Are these details accessible to the general public or restricted to Sourcewell members?

In the event that our proposal is not selected for an award, what information from our submission will remain publicly accessible, and through what platform can it be viewed?

**Answer 1:**

Refer to RFP Section VI. Evaluation and Award, E. Disposition of Proposals," All materials submitted in response to this RFP will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591, after negotiations are complete. Sourcewell considers that negotiations are complete upon execution of a resulting contract. It is the proposer's responsibility to clearly identify any data submitted that it considers to be protected. Proposer must also include a justification for the classification citing the applicable Minnesota law. Sourcewell may reject proposals that are marked confidential or nonpublic, either substantially or in their entirety.

**Question 2:**

In reference to Question 68–Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?–What does P-card mean?

**Answer 2:**

A P-card is also known as a Procurement or Purchasing Card. This payment type allows Sourcewell participating agencies to purchase directly from an awarded supplier within the card's and entity's spending limits.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/28/2024, is required at the time of proposal submittal.



5/30/2024

Addendum No. 16

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

How is the 40% for pricing going to be scored? Is there a formula? What are you explicitly looking to rate/score each company against here? How will you score companies that offer different services that are in the same category —e.g. one company could be as SaaS provider and another company could have a software and hardware component so their approach to pricing would be different. Will one company get the highest marks in pricing for each category or will companies be scored on pricing independently of other companies in their category? Is there a minimum score that you have to get to, to be considered in each category?

**Answer 1:**

Proposals are evaluated based on the criteria stated in the RFP. Review the Sourcewell Evaluator Scoring Guide which is available for review/download on the Homepage of the Sourcewell Procurement Portal.

**Question 2:**

Could you let us know what the budget is for this work?

**Answer 2:**

Based on past volume of similar contracts, the estimated annual value of all transactions from contracts resulting from this RFP are anticipated to be USD 50 Million; therefore, proposers are expected to propose volume pricing. Sourcewell anticipates considerable activity under the contract(s) awarded from this RFP; however, sales and sales volume

from any resulting contract are not guaranteed. Each Participating Agency might have its own unique budget when using our awarded contracts.

**Question 3:**

Could you please confirm you are not looking for a COTS, but a custom solution for the same?

**Answer 3:**

In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article II B. - Requested Equipment, Products, or Services. Proposals are evaluated based on the criteria stated in the RFP.

**Question 4:**

Specific Functional Requirements. Can you provide more details on the specific functionalities and features required for the Procure-to-Pay and Contract Management System? Are there any mandatory capabilities that the system must support?

Integration and Compatibility: What existing systems or platforms does the Procure-to-Pay and Contract Management System need to integrate with? Are there any preferred or required standards for integration?

Customization and Scalability: To what extent is customization expected or allowed for the proposed solution? Are there any particular customization needs or future scalability requirements that we should be aware of?

User Access and Permissions: Can you elaborate on the user roles and permission levels that the system must support? How many users are expected to utilize the system, and what are the specific access control requirements?

Compliance and Security Standards: What compliance and security standards must the proposed system adhere to? Are there any specific regulatory requirements or certifications that the solution must meet?

**Answer 4:**

The Sourcewell RFP is an open and competitive solicitation process. Each proposer, in its discretion, will propose the equipment, products, and services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated

based on the criteria stated in the RFP. A Participating Entity may request additional terms or conditions related to a purchase.

**Question 5:**

Our pricing is generally based on the number of users and functionalities offered for each projects. We can provide the final pricing only once the final requirement is identified for each projects. So, at this time is it ok to provide a pricing example instead of providing the actual pricing?

**Answer 5:**

Review RFP Section III. Pricing for Pricing offered. Sourcewell will not advise a proposer on the content of the proposal.

**Question 6:**

Could you please provide a detailed description of the “Pricing Offered” section found under Table 12? Which option should be selected if our pricing varies based on the functionalities implemented and the extent of customization?

**Answer 6:**

See Answer 5.

**Question 7:**

What is the estimated date for the RFP award? Will vendors be selected solely for specific subcategories?

**Answer 7:**

The estimated award date is approximately 45-60 days after the public opening of proposals. Proposers may only receive an award within the Category(-ies) they designate. Sourcewell reserves the right to re-categorize any designation as it deems appropriate.

**Question 8:**

Are there any minimum revenue requirements that vendors must meet to qualify for acceptance?

**Answer 8:**

In the competitive process, Sourcewell will not advise a proposer on the proposal's content. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. The solicitation is a competitive process, and proposals are evaluated on the content submitted. Review RFP II. E. Estimated Contract Value and Usage for the estimated annual volume of the contract.

**Question 9:**

Is there any scoring advantage for organization certifications (For example SMWBE)?

**Answer 9:**

See Answer 1.

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 5/30/2024, is required at the time of proposal submittal.



6/3/2024

Addendum No. 17

Solicitation Number: RFP 060624

Solicitation Name: Software Solutions and Related Services for Public Sector and Education Administration

Consider the following to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Due to unanticipated marketplace circumstances, the submission deadline has been extended to allow suppliers additional time to prepare responses. The RFP submission deadline has been extended until **June 20<sup>th</sup>, 2024**.**

**RFP Timeline **(Revised)****

**Proposal Due Date:** **June 20, 2024**, 4:30 p.m., Central Time  
Late responses will not be considered.

**Opening:** **June 20, 2024**, 4:30 p.m., Central Time

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End of Addendum

Acknowledgement of this Addendum to RFP 060624 posted to the Sourcewell Procurement Portal on 6/3/2024, is required at the time of proposal submittal.