Request for Proposals No. 2024-25 Addendum 01 – Pre-Bid Conference Q&A

This document is posted to capture the questions received, and agency answers provided, during the Pre-Bid Conference, which was held on July 30, 2024.

All amendments, addenda, and notifications related to this procurement will be posted on the [OSPI website](#) and on the Washington Electronic Business Solution ([WEBS](#)) website. Additional questions concerning this procurement must be submitted to [contracts@K12.wa.us](#). Communication directed to other parties will be considered unofficial and non-binding on OSPI, and may result in disqualification of the Consultant.

1. **Question:** What is the platform that the current SAFS system is developed on?
   Answer: The technology stack for the legacy system includes the following components:
   Microsoft Windows Server 2008 R2 (Database servers)
   Microsoft Windows Server 2012 R2 (Web servers)
   Microsoft Internet Information Services 8 (Web server)
   Microsoft SQL Server 2008 R2 (Database server)
   Microsoft SQL Server 2005 Reporting Services (Database server)
   Microsoft Visual Studio 2005 (C#, ASP.Net, .Net Framework)

   The following tools are used for code management and deployment
   Team Foundation Server 2012
   OSPI Deployment Manager

2. **Question:** Per Section A2 of the RFP – are you considering selecting multiple vendors for this proposed solution?
   Answer: We wish to work with one lead vendor for the system development, although it is acceptable for bidders propose subcontractors. Additionally, we expect to contract separately with one or more other vendors for Quality Assurance, Project Management, and Change Management, although we will entertain proposals that are inclusive of Change Management services. Details are described in Section C.5.vi of the RFP and Section F of the sample contract included in the RFP.

3. **Question:** Will this RFP be expanded to include work and funding to update school districts systems to integrate with the new SAFS systems?
   Answer: This RFP will not include work on school district financial systems. We anticipate that districts and other Local Education Agencies (LEAs) will be minimally impacted by this project; at most, some data elements that they input may be altered (but this already happens annually), and the avenues by which they report this information to OSPI may

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be updated. If either of those changes occur, training and Organizational Change Management steps would be part of this work.

4. **Question:** Does OSPI currently use Entra ID for user identification?
OSPI does not use Entra ID for application authentication today; however, Entra ID is installed in our Azure environment. OSPI is researching the viability of Entra ID as an enterprise authentication system for applications. This project may result in our first actual implementation, although other systems are in the running.

5. **Question:** Should bidders emphasize individuals or roles when bidding a team and writing about their experience?
Per Section C.5.i and C.5.ii of the RFP, OSPI requests a description of the bidder's company's collective experience, but it is important to submit resumes for each person proposed for the team. We recognize that work on this project is not slated to begin before July 1, 2025, meaning that some of the proposed team may no longer be available. Substitutions can be negotiated during or after discussions with the apparent successful vendor. References (Section C5iii) should refer largely to corporate experience, but can also cite team member experience.

6. **Question:** Will this effort address bringing outdated parts of the system up-to-date, or will are changes wholesale in scale?
This effort is to address the entire system. The sizeable business rule set will be brought over in full (less any changes mandated by the legislature, any necessary corrections, and automations of what are presently manual processes), but the underlying purpose of this project is to move all apportionment functionality to a modern, cloud-based architecture with an easily updateable Business Rules Engine and robust security that facilitates the finance business of fund distribution, monitoring, and reporting.

7. **Question:** The scoring rubric in the RFP seems to suggest a preference for off-the-shelf products. Is that a true reflection of OSPI's interest?
We prefer a Low-Code financial system already deployed in an Off-the-Shelf (COTS) product. However, we realize that there may not be a production COTS system that does everything needed to facilitate our financial operation with the school districts. So, we will also accept bids for custom developed systems or modifications to working systems, while the feasibility study conducted in 2024 suggests that a Low-Code Application Platform would be the most appropriate solution, and this is our stated preference. If proposing a non-COTS solution, feel free to elaborate on your proposed solution and/or provide mockups.

8. **Question:** What internal resources will OSPI commit to this project?
This project is the highest priority IT project for OSPI and will be highly visible to the legislature as well. Because of its size and impact, we expect WaTech oversight as a gated project. OSPI intends to hire or contract a dedicated Project Manager, Quality Assurance

Manager, and Change Control Manager. The Executive Sponsor is a cabinet member who has hands-on experience with the system, and will ensure that Subject Matter Experts (SMEs) provide timely attention as required by the bidder. Similarly, Our Information Technology Services (ITS) will similarly be open to providing full and timely support.

9. **Question:** Do you expect this system to include GIS/shapefile logic in the Apportionment rules?
   We do not see the Apportionment System connecting to GIS in the near future: we do not use boundary-based data as part of the submission or reporting process for school districts. However, project sponsors are open to a system that provides this functionality already. GIS functionality will not be part of a custom development effort unless requirements change.

10. **Question:** How much lead time can be provided prior to demos to allow for customized solutions to be developed?
    Demos are currently scheduled for September 16-20; please consider your capacity to prepare a demonstration with those dates in mind. Please let us know, however, if you feel that this provides insufficient time to prepare.

11. **Question:** Is there a preference for platform or is this project "cloud agnostic"?
    There is no preference for bidder-maintained solutions. We would prefer an Azure-based platform for custom solutions. However, we are open to other platforms. We simply want a secure modern cloud offering with this solution.

12. **Question:** Will this RFP include separate contracts for project staff such as Project Manager, Business Analyst, Quality Assurance, or Change Manager?
    OSPI intends to hire or contract a dedicated Project Manager, Quality Assurance Manager, and Change Control Manager. Bidders may incorporate these services within their proposals. However, please line item each cost so that proposals can be compared "apples to apples" when reviewing total costs of the proposal

13. **Question:** For vendors in a position to provide just software, or software and services, how should we make both options clear?
    Please call out "extra" goods and services in the work plan (Section C.4.ii), deliverables (Section (C.4.iv), and cost proposal (Section C.6) as "optional". OSPI will get as close as possible to an "apples-to-apples" comparison of costs for the standard suite of work, but would benefit from knowing what else you can bring to the table. (Please note, too, that we are not required to take the lowest bid.)

14. **Question:** Is it the case that the financial allocation for this project is dependent on the legislature?
    Yes: this seems to be increasingly common for Washington state's large technology projects. We will use what we learn in the RFP responses to create a "Decision Package (DP)" for the legislature. The legislature will review this DP in its session beginning in January, 2025 and likely will allocate us the money and authority to start the project. So long as we continue to demonstrate good governance and results, they will provide enough money to complete the project. However, significant overruns or change orders can result in delays and reconsideration.

15. **Question:** Should the bidder offer Change Management assistance?
    Yes, if that capacity is available. Please see the answer to question 13, above, to ensure that this is duly considered. Note: we anticipate that the change happening externally (that is, visible to users) will be less dramatic than what is happening inside the system, although we hope to streamline data reporting and automate manual processes. Moving to the cloud represents a change for OSPI technical staff.

16. **Question:** Can you define "sizable", in reference to the requirement of having built a sizable financial system?
    We cannot precisely define "sizeable". We'd like to hear about any experience you have with financial systems, regardless of system size.

17. **Question:** Where can I access the feasibility study to review recommendations for a proposed solution?
    [Apportionment (SAFS) Feasibility Study](Apportionment-SAFS-Feasibility-Study)

No questions or responses included in this document require any changes to the solicitation document; this document stands alone.