

**August 17, 2023**  
**Rhode Island Commerce Corporation**  
**REQUEST FOR PROPOSALS**

Solicitation Number: **RFP-2316**  
ADDENDUM NO. 2  
Questions & Answers

**REQUEST FOR PROPOSALS**  
**PROJECT MANAGEMENT SOFTWARE**

The Rhode Island Commerce Corporation (“Corporation”) seeks proposals from qualified providers to provide web- or cloud-based project management software to assist the Corporation in the administration of internal projects, grants, forms, and event administration.

**Question #1:** Wavity plans to bid on this RFP, in order to provide pricing we need a user count, daily users, occasional users, administrators, etc.

**Answer #1:** The Corporation expects to have 100 users total, comprising 65 daily users, 30 occasional users, and 5 administrators.

**Question #2:** Is this RFP for construction project management? If so, what is the annual construction volume estimated to be?

**Answer #2:** This RFP is not for construction. It is for “web- or cloud-based project management software.”

**Question #3:** Tracking tasks: please list example of some of the tasks the Corporation is tracking at the moment and narratives of the processes of how these tasks are managed from beginning to end.

**Answer #3:** Corporation staff presently track tasks differently. Some use a project management software individually; others use Notes or task lists or other tools. Tasks may include things like writing and releasing and scoring an RFP, launching and implementing a grant program, managing a series of community conversations, developing collateral, managing events, tracking budgets and various other uses.

**Question #4:** What are examples of types of “projects” the Corporation tracks?

**Answer #4:** See answer to Question #3.

**Question #5:** Does the Corporation currently track detailed project schedules using Microsoft Project?

**Answer #5:** No

**Question #6:** Does the Corporation wish to manage project resources and gain insight into availability of key project resources?

**Answer #6:** Yes

**Question #7:** Please provide some narratives on how the Corporation currently process [sic] decisioning (page 1, sentence 1, under “Project Overview”)

**Answer #7:** Page 1, sentence 1, under Project Overview states: “The Corporation presently manages projects—including tracking tasks, assignments, document versioning, and decisioning—through SharePoint files and spreadsheets.”

**Question #8:** To what extend [sic.] does the Corporation currently utilize SharePoint in terms of management document?

**Answer #8:** The Corporation utilizes Microsoft Teams for collaboration on specific initiatives. The Corporation is in the middle of a migration of a traditional on-premises file server to SharePoint.

**Question #9:** Does the Corporation have a need to comment/redline on internal or externally-submitted documents/photos?

**Answer #9:** Yes; also, please note answer to Question 20.

**Question #10:** Please list examples of some of the decisions that may require the Corporation currently go through levels of internal review/approval.

**Answer #10:** Examples include: approval to post an RFP and select a vendor based on responses to that RFP as well as finalize collateral highlighting programs of the Corporation before they are sent to print.

**Question #11:** Please provide examples of some of the reports/analysis the Corporation currently utilizes (related to item 4 in page 2)

**Answer #11:** Corporation staff use Salesforce dashboards, as well as Power BI and other internally created dashboards and slide decks to report out information.

**Question #12:** Please provide additional narratives on grant management functionalities the Corporation is looking for in the propose [sic] system.

**Answer #12:** This is outside the scope of this RFP.

**Question #13:** Does the Corporation have needs to track grant applications and/or grant compliance?

**Answer #13:** The Corporation may seek to use this project management software to track grant applications. Regarding grant compliance, see answer to Question #12.

**Question #14:** Related to Forms and Event Administration mentioned on page 1, paragraph 1 of the RFP, please provide additional details:

For forms, does the Corporation require only the ability to manage versions of existing forms (in digital document formats) or the ability for internal/external parties to fill in in-take forms via internal or public-facing portals. Please also lists examples of such forms.

For Event Administration, please provide narratives on types of events and the business process of administering such events.

**Answer #14:** The Corporation requires both the ability to manage versions of existing forms as well as the ability for internal/external parties to complete intake forms. Some examples are internal Marketing Request forms.

**Question #15:** Please provide narratives on the types of approval processes the Corporation currently goes through that requires document e-signature.

**Answer #15:** Approval processes requiring e-signature include financial processes. Document e-signature is also used for some Request forms.

**Question #16:** Please provide the types of data exchanges needed with each of the systems mentioned in item 6 under page 2 of the RFP.

**Answer #16:** The Corporation will prioritize software that can easily share files and integrate core functionality with the Corporation's current tech stack, especially through API transfers for csv files between databases.

**Question #17:** Does the corporation require any type of financial management or project anticipated cost analysis functions in the propose [sic] system.

**Answer #17:** The Corporation does not anticipate this project management software to provide financial management or cost analysis functions.

**Question #18:** Please state the current project budget. If unavailable, please state the anticipated range of expectations for Annual Licenses and Implementation costs.

**Answer #18:** Not at this time. The budget will be discussed with the contracted service provider.

**Question #19:** RICC is requesting a total maximum price. When would the adjustment period be finalized?

**Answer #19:** Proposers should provide a total maximum price as well as articulate how long the price holds.

**Question #20:** What level of integration is required between the new software and existing systems like SharePoint, Teams, Neoserra Salesforce, etc? API, single sign-on: One way / Two way Integration? How many data fields and overall level of complexity?

**Answer #20:** Proposers should respond with the level of integration capacity they have with each of the listed softwares/programs above.

**Question #21:** Does your organization have any specific security requirements, such as encryption, SSO, or data residency needs?

**Answer #21:** Data in motion and at rest needs to be encrypted using industry standard technologies. Data residency is not specifically restricted, but North American residency is preferable for best performance. SSO integration with Azure AD (Microsoft Entra) is strongly preferred but also not mandatory.

**Question #22:** Are there any required integrations with other internal systems beyond Microsoft products, like ERP or CRM?

**Answer #22:** The Corporation utilizes an on-premise version of Microsoft Great Plains for accounting. We utilize Salesforce CRM. The only integrations required are those with Microsoft Teams and SharePoint, Adobe Creative Cloud, Salesforce, Neoserra.

**Question #23:** What are your API requirements for integrating with other tools and custom apps? REST, SOAP, OpenAPI specs?

**Answer #23:** See Response for Question #22

**Question #24:** How is existing project data stored that would need to be migrated - SharePoint, file shares, Excel?

**Answer #24:** Project files are presently stored in MS Sharepoint.

**Question #25:** Do you have any legacy or on-premise systems that would need API integration with the new platform?

**Answer #25:** See answer to Question #22

**Question #26:** What are the expected storage and retention requirements for documents and files within the system?

**Answer #26:** See answer to Question #24. Additionally, the Corporation must abide by all state records retentions requirements.

**Question #27:** Is there any scope for external users with the new system? If yes, determine the use case and the count

**Answer #27:** There is a potential need for 5-10 external users to access the project management software generally. The software should be able to share projects and task lists with external users.

**Question #28:** Is Corporation required any data visualisation [sic] tool ? like Tableau, PowerBI ,etc [sic]

**Answer #28:** This is outside of the scope of this RFP.

**Question #29:** Approximately how many automated email communications/notifications need to be configured in the system?

**Answer #29:** Automated notifications should be able to be turned off and on based on the user of the project management software.

**Question #30:** What are the top challenges experienced currently with tracking projects and tasks across the organization?

**Answer #30:** As stated in the RFP: "The Corporation presently manages projects—including tracking tasks, assignments, document versioning, and decisioning—through SharePoint files and spreadsheets. The Corporation will utilize this web- or cloud-based software to internally align work, people, and technology across the Corporation. The goal of this project is to bring departments, processes, and technology together to connect the work being done across the Corporation — and ensure alignment with goals — on a centralized, cloud-based platform."

**Question #31:** What specific grant, form, or event administration processes need to be managed? Can you provide examples?

**Answer #31:** See answer to Question #3.

**Question #32:** What types of reports, dashboards, or visibility does leadership need into projects and resource utilization?

**Answer #32:** See answer to Question #11.

**Question #33:** What mobile capabilities are required - native apps, responsive web, offline access?

**Answer #33:** Native apps and responsive web.

**Question #34:** Does the Corporation currently use and/or expect to use Gantt charts for Project Management schedules. If so, what tools/platform are you currently using?

**Answer #34:** Yes.

**Question #35:** Does Rhode Island Commerce Corporation have any incumbent tools, products, or vendors that should be considered when proposing a replacement solution?

**Answer #35:** The Corporation does not have a single project management software presently being used.

**Question #36:** The Corporation manages a number of federal grants; state incentive grant, and business support programs; tourism and business attraction efforts; and internal systems and processes.' - is the State also looking for vendor to implement the grants management solution or used only for tracking the grants applications? Is there any existing system for grants to be integrated with?

**Answer #36:** This solicitation is for project management software specifically. Regarding integration, see answer to Question #20.

**Question #37:** Is there a scope for data migration? If yes, What objects will be migrated? What is estimated data volume of each object? Is any data warehouse being used currently?

**Answer #37:** The Corporation presently stores data on premise and is migrating toward cloud-based storage. Individual project data migration, as applicable, will be negotiated with selected vendor.

**Question #38:** What timeframe does Rhode Island Commerce Corporation have in mind for selecting and implementing this new software?

**Answer #38:** The Corporation seeks to implement the selected software as quickly as is feasible.

**Question #39:** What is the 3 year budget or desired price range for licensing, setup, and annual support for this project management software?

**Answer #39:** See answer to Question #18.

**Question #40:** Determine the user personas who will require access to the system & the user count?

**Answer #40:** See answer to Question #1. Users will include all Corporation staff, ranging from business development to marketing to finance professionals.

\*\*\*End of Addendum \*\*\*