

Washington State Department of Retirement Systems
Request for Proposals: Knowledge Management Solution
DRS RFP 13-007-100 Vendor Questions and Responses

Vendor Question	Response
General	
1. Which products, if any, did DRS evaluate prior to releasing the RFP? Did any of the products meet or come close to meeting your requirements?	DRS had demonstrations from three (3) vendors in association with the KM/CRM RFP 12-101. DRS is now interested in a standalone KMS solution to which we might add a CRM later.
2. Please explain what you mean about using the system for searching your partners' websites. What type of functionality is expected?	Our partner sites contain Plan information (publications and calculators) about our "Plan 3s" and our Deferred Compensation Program that we do not duplicate on our website. We would like to be able to search these from the KMS. Our Partner websites are: http://www.icmarc.org/washingtonstate.html https://washington.gwrs.com/login.do
3. Negotiation Process - What are the activities and steps in the negotiation stage?	The negotiation process includes discussions to finalize the statement of work, schedule and cost ending in a final signed contract.
4. Budget – Are there any considerations as to when and how the budget should be spent?	DRS expects the software to be installed by June 30, 2013 and is not authorized to pre-pay for any services.
5. To avoid additional markup for SaaS licensing costs, is DRS willing to purchase licenses directly from the cloud services provider rather than going through a reseller?	Yes.
6. How large is the pool of potential solutions?	Unknown at this time.
7. Can you provide any other specific needs in addition to basic KM functionality?	Not at this time.
8. How many users?	Please refer to page 19, 3.6 Cost Proposal (Scored) in the RFP.
9. Will this solution be deployed internally or are you looking for a hosted solution?	Please refer to page 19, 3.6 Cost Proposal (Scored) in the RFP. DRS is open to both approaches.
10. Must the solution be installed and hosted on your infrastructure, or can vendors propose a hosted solution?	Please refer to page 19, 3.6 Cost Proposal (Scored) in the RFP. DRS is open to both approaches.
11. Are you looking only at commercial off the shelf software products to buy and install with customizations, or are you open to vendors who propose building a software product for you from scratch – a total customized developed solution?	DRS is open to customized software but is expecting the software to be working and completely installed by June 30, 2013.

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<p>12. Minimum qualifications state "... successful KMS software implementations, of comparable size to DRS". Must it be "KMS" software implementation, or can it be any large software implementation where search/retrieval of information, documents and knowledge was demonstrated?</p>	<p>DRS is asking for successful KMS software implementations.</p>
<p>13. We are assuming that any other organization or department comparable in size to DRS is OK. Please confirm.</p>	<p>Confirmed.</p>
KMS Features Section	
<p>14. "Save search result lists or use a shortcut to re-find documents" Q. Is the State of WA expecting custom code or custom bookmark for this functionality?</p>	<p>DRS is not expecting custom code or bookmarks. Describe what functionality is available in your product.</p>
<p>15. "Ability to expand the database as content expands and to increase or reduce the number of users as necessary." Q. How many anticipated articles and categories does the State of WA anticipate to make up the KB?</p>	<p>DRS expects to continually add information to the KMS. DRS is interested in any size limitations, expansion possibilities and costs.</p>
<p>16. Which CRM software would the KMS need to integrate with, and what would the integration points be?</p>	<p>DRS does not currently have CRM software, but would like to in the future. We are interested in understanding what integration might be possible if we choose your KMS software.</p>
<p>17. Page 14, Search Function: bullet 4, 5 Search specific internet sites and multiple intranet sites and multiple knowledge bases such as current SharePoint Sites. Q. When you search in multiple sites, how do you determine the relevant results? Q. What determines the correct answer and what gets displayed at the top of the search results list?</p>	<ul style="list-style-type: none"> ➤ DRS would be interested in recommendations for ordering results from multiple sites. ➤ DRS expects to have some answers that will always "pin" to the top of a search result list, but would like recommendations for ordering results from multiple sites.
<p>18. "Ability to programmatically retrieve data within the KMS with an indexed search and utilize a dynamic website such as rtf, xml, htm" Q. Is this a federated search?</p>	<p>Not initially, but might consider it in the future.</p>

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<p>19. Page 14, Search Function: bullet 8 Ability to programmatically retrieve data within the KMS with an indexed search and utilize a dynamic website such as rtf, xml, htm. Q. What do you mean, “utilize a dynamic website such as rtf, xml, htm”?</p>	<p>Ability to programmatically retrieve data, such as from within the KMS, with an indexed search from a dynamic website.</p>
<p>20. Page 14, Search Result list: bullet 5 List all results for internal users only, even if user does not have permission to read the item. Q. Is this wording correct? Q. Are you sure you want to expose search results to users that cannot get the answer when they click the link?</p>	<ul style="list-style-type: none"> ➤ Yes. ➤ DRS would like internal users to be aware of all search results. Internal users could ask for permission for articles or information they don’t have access to.
<p>21. Page 16 question 16 Customizable Screen- Ability to adjust the screen (font) for ease of use. Q. Can you please explain what you mean by the ability to adjust the screen?</p>	<p>DRS would like users to be able to customize their view to personal preferences such as font size, which elements show on a screen and where certain elements are displayed.</p>
<p>22. Page 16 question 18 External Authentication: Ability for external users to create and manage user accounts. Q. Do you want users to self register or do you want to create an account for them? Q. When members log-in, do they need or expect to log in with enhanced security? Q. Do you want to provide two-way secure communication with your members?</p>	<p>DRS is expecting to provide a robust search feature for external users outside of our portal which provides individual confidential information. If DRS does external authentication for search purposes, it would be to narrow the search results for the user based on information such as system and plan.</p> <ul style="list-style-type: none"> ➤ We want them to self-register. ➤ No ➤ No
KMS Questions Section	
<p>23. 3.2B1 What specific areas would you like us to focus on: KMS Search, security and portal technology?</p>	<p>DRS would like to know which are your product’s three (3) best features and how they would benefit DRS.</p>
KMS/CRM Integration Section	
<p>24. What system do you use for your case management of phone, walk-in, and email, requests today?</p>	<p>DRS currently uses several internal systems based on spreadsheets and small databases.</p>
<p>25. What is the level of integration expected with the KMS?</p>	<p>DRS does not currently have CRM software, but would like to in the future. We are interested in understanding what integration might be possible if we choose your KMS software.</p>

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26. 3.2B5 – Integration / Data Migration. What systems will the KB be integrating to, if any?	DRS does not initially expect the KMS to integrate with any other software (except to implement single sign-on for internal users). We are interested in understanding what integration might be possible if we choose your KMS software.
27. 3.2B5 – Integration / Data Migration. Content Creation: Will DRS be responsible for data load of articles or will DRS rely on the vendor to conduct the data loads?	DRS will be responsible for the data load, but would like assistance with the initial load and/or recommendations and possibly training in this area.
28. 3.2B5 – Integration / Data Migration. Will there be scheduled data loads over a course of time?	Yes, DRS expects to continually add information to the KMS.
29. 3.2B9 – Training. How many administrators will there be for training?	Three internal users with administrative rights; 10 internal users with permission to approve and post articles, or link to and tag existing items.
30. 3.2B9 – Training. How many anticipated end users will be involved in training?	230 internal users with read only access.
31. 3.2B9 – Training. Will there be any train-the-trainer sessions?	DRS is open to train-the-trainer sessions and would be interested in your recommendations. DRS has an internal trainer who will be responsible for providing on-going training to team members.
32. What information do you need to search for on your partners’ websites? Can you provide an example or two?	DRS primary partner websites are: http://www.icmarc.org/washingtonstate.html https://washington.gwrs.com/login.do
33. 3.2C2 – More information needed around “Partner websites.” Are they asking about exposing their KB onto their partners’ websites? Or to allow for search of partners’ KB’s on their site?	Our partner sites contain Plan information (publications and calculators) about our “Plan 3s” and our Deferred Compensation Program that we do not duplicate on our website. We would like to be able to search these from the KMS. http://www.icmarc.org/washingtonstate.html https://washington.gwrs.com/login.do
Technical Solution Section	
34. What are the requirements with regard to this section: A. Provide a statement that your proposed software will integrate with DRS’s environment. If proposal is a hosted solution: <ul style="list-style-type: none"> • Authentication/Authorization: Microsoft Active Directory (AD) – If Single Sign-On then ADFS; Resource Access Control Facility (RACF) for Mainframe 	

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<p>Q. Does this mean that the externally hosted software has to integrate with DRS’s Active Directory?</p> <p>Q. If so, how will we get through the State firewalls?</p> <p>Q. Does the system need to integrate with any IBM mainframes, or was RACF only mentioned in case the system itself uses a mainframe?</p> <p>Q. Please confirm whether it is acceptable for the KMS to utilize a standard website login over HTTPS, or whether it must employ some kind of single sign-on.</p>	<ul style="list-style-type: none"> ➤ Yes, with SAML compatible federated authentication (e.g. ADFS). ➤ Our ADFS is available from outside the State firewall. ➤ No, RACF is only mentioned as information about our existing systems. ➤ Standard SAML authentication must be used for secured documents. Public documents need no authentication.
<p>35. Authentication to RACF:</p> <p>Q. Do you expect Single Sign-On integration for the mainframe, (RACF)?</p> <p>Q. What is the level of integration you expect?</p>	<ul style="list-style-type: none"> ➤ No ➤ None
<p>36. Page 18, Section 3.3 D</p> <p>Q. What system do you expect to use to authenticate your members via single sign-on to KMS? Is it the portal or is it something different like Active Directories?</p>	<p>Any federated security offering which works with SAML should be sufficient. DRS would like users who have authenticated through the DRS network to not have to log into the KMS with another password.</p>
<p>37. 3.3.D – Please explain what is meant by “various systems in the agency”?</p>	<p>DRS would like users who have authenticated through the DRS network to not have to “login with another password” into the KMS</p>
Cost Proposal Section	
<p>38. DRS expects a fixed price bid.</p> <p>Q. How do you plan increased usage and how can we price for increases in usage over time?</p>	<p>DRS doesn’t anticipate significant increase in the number of users, please use the parameters given in section 3.6 Cost Proposal (Scored).</p>
<p>39. Based on our experience with other agencies, and your 500K active and inactive members and 1300 public businesses, the external view count volume of 4000 / month seems extremely low.</p> <p>Q. What is this number based on?</p> <p>Q. What is the expected external usage growth over the 3 year and 6 year timelines?</p>	<ul style="list-style-type: none"> ➤ This is the external view count of our posted forms and publications. DRS receives, on average, 65,000 – 70,000 unique visitors to the DRS website per month. ➤ DRS does not expect significant growth.
<p>40. In section 3.6, Cost Proposal, the statement is that “DRS currently has delegated authority to enter into a contract not to exceed \$500,000 over the life of the contract.” In section 1.3, Period of Performance, the RFP states that “The initial term on the contract will be three years, with the right to extend the contract for up to three additional one-year periods.” Is the \$500,00 budget for three or six years?</p>	<p>The life of a contract includes any extensions and cannot exceed \$500,000.</p>

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41. In section 1.2, Objective, the RFP states that “DRS expects at least two phases to implement the KMS; the first phase will be an internal audience in RSD’s contact center and the future phases will expand the KMS to external audiences and other divisions.” For pricing purposes, what should the proposer assume about the timing of the second phase?	Timing of the second phase will depend on the cost and details of the final contract as well as agency priorities