

Office of the Mayor-President

Purchasing Division



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ADDENDUM NO. 2
October 12, 2023

Your reference is directed to: **File Number: 2023-26-4150**

Solicitation Number: **2023-26-4150 RFQ Audit Management & Electronic Working Papers Software System**

Scheduled to open: **October 23, 2023 at 2:00 pm CST**

The following changes are to be made to the referenced solicitation:

The following **Questions & Answers** will be made part of the above referenced solicitation.

This addendum is hereby officially made a part of the referenced solicitation and should be attached to the bidder's proposal or otherwise acknowledged therein.

If you have already submitted your proposal and this addendum causes you to revise your original bid, please indicate changes herein and return to Purchasing prior to bid opening in an envelope marked with the file number, bid opening date, and time. If this addendum does not cause you to revise your bid, please acknowledge receipt of the addendum by signing your name and company below and returning it in accordance with the provisions above.

cc: Bid File 2023-26-4150

pgore@brla.gov
225-389-3259 x 3279

Signature

Date

Company

RFQ 2023-26-4150 Audit Management & Electronic Working Papers Software System

Addendum No. 2 – Questions & Answers

Question 1: What are the requirements for pricing information to be submitted?

Answer 1: NOTE: This financial proposal shall include any and all costs the Proposer wishes to have considered in the contractual arrangement with the City-Parish. If quoted as a lump sum, individual rates and itemized costs included in the lump sum are to be included with the proposal submittal.

Question 2: Is Attachment B-1 missing from this RFQ?

Answer 2: This RFQ does not include Attachment B-1.

Question 3: Did a vendor provide any support to the Parish with putting this RFQ together? If so, is that vendor allowed to respond to this RFQ?

Answer 3: No.

Question 4: This Solicitation was released as a RFQ, previous Solicitations have been released as a RFP. Is there a reason this was released as a RFQ?

Answer 4: A RFQ process seeks qualified providers as outlined in the RFQ and selects the vendor most qualified. The City-Parish then enters price negotiations with that vendor.

Question 5: Will pricing conversation be part of this RFQ process or will another solicitation document be released for the pricing conversation?

Answer 5: Yes; No.

Question 6: Any expectation of data loads or period refreshes of bulk taxpayer registration data (demographics)?

Answer 6: This is not an expected requirement for this RFQ.

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Addendum No. 2 – Questions & Answers (continued)

Question 7: Is IT involved as a decision-maker in the evaluation?

Answer 7: An IT representative will be a member of the RFQ evaluation committee.

Question 8: Would there ever be a need for co-mingling the City and Parish data tenants?

Answer 8: City and Parish data is already combined.

Question 9: Requirement F027 – is this considered a secondary requirement since it is not a deal breaker?

Answer 9: F027 is a primary criterion and will be weighted higher than secondary criteria. Proposers must meet a minimum score of 60 points of the available 81 points in functional and technical criteria to be considered responsive to the RFQ.

Question 10: How are you looking for the system to segregate internal and external audits?

Answer 10: The vendor can propose options supported by their software. This separation may be by audit code, audit status, department codes, user permissions, or other system enabled separators. This may be similar to how an audit firm uses the same software slightly differently for financial, operational, or consulting engagements.

Question 11: Requirement F037- could you please elaborate if it is an external or internal requirement and what it entails?

Answer 11: F037 is a secondary need. It could be used by Internal and Revenue Auditing in varying ways if available. This would allow the designation and weighting of risks. This could aid in audit selection.

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Addendum No. 2 – Questions & Answers(continued)

Question 12: Is there a specific requirement about using the functionality to find specific taxpayers, in other words, does the City-Parish expect to utilize the system for audit selection and scoring?

Answer 12: Multiple functional requirements express the needs for reporting on data within the system. F031 expresses the need for indexing so that users can search the data. T021 discusses the ability to query data and user defined fields.

Question 13: In F028, please define “external stakeholders”. Would these include users from outside of the City-Parish domain?

Answer 13: External stakeholders could include users within or outside of the City-Parish domain. These would be the auditees who may need limited access to exchange or share information with the auditors.

Question 14: Does the City-Parish have a budget limit for this opportunity? If so, can the City-Parish share what that limit is on an annual basis?

Answer 14: Preliminary estimated funding is procured for the purchase and implementation of this contract. The City-Parish annual operating budget can be found at: <https://www.brla.gov/1406/Annual-Operating-Budgets>.

Question 15: Has the City-Parish received any demonstrations in relation to this solicitation?

Answer 15: No.

Question 16: What type of access are external stakeholders desired to have? Is this restricted to review of reports, or document access, or all the way to submitting documents or conducting edits/updates to documents on the platform?

Answer 16: External stakeholders could include users within or outside of the City-Parish domain. These would be the auditees who may need limited access to exchange or share information with the auditors. In your response, include the various capabilities of your system.

Addendum No. 2 – Questions & Answers(continued)

Question 17: Would the City-Parish evaluate/grant positive score to relevant past performances/references?

Answer 17: Scoring for background and experience with similar size projects, other government agencies, and the capability and qualifications of personnel will be evaluated as noted on page 22.

Question 18: Does the City-Parish have an anticipated go-live date?

Answer 18: We do not have a specific go-live date. However, please include your timeline and implementation strategy as noted page 22.

Question 19: Does the City-Parish require Data Migration of legacy data/cases/templates? If so, what is the volume of data expected to be migrated? What are the data types to be migrated (csv, multimedia, pdfs, images, etc.)?

Answer 19: This is a secondary consideration as noted in T017. The legacy data would be exportable as an excel or csv file. The size of the data is unknown at this time. We do not anticipate exporting the entire audit history.

Question 20: What is the number of external users that might need to access the system simultaneously?

Answer 20: The estimated number of external stakeholders actively using the system simultaneously would likely be a range of 100 - 150.

Question 21: Please clarify the most successful means of delivering responses to the Office given the stated difficulties with postal services.

Answer 21: The most successful means of submitting a response is in person/hand delivery.

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Addendum No. 2 – Questions & Answers(continued)

Question 22: Is it acceptable to respond to attachment D with a recreated form on a word document?

Answer 22: Yes.

Question 23: Is it the expectation to share our redlines to non-mandatory terms in the Attachment E: Sample Contract as part of the RFQ response, or similar to the pricing, this will be negotiated with the vendor of choice after selection?

- a. If the expectation is to share redlines prior, will the City of Baton Rouge be open to incorporating additional provisions necessary and appropriate for software?

Answer 23: The terms for these documents may be negotiated as part of the negotiation process, with the exception of contract provisions that are non-negotiable.

Question 24:Is the City looking for a Hosted Solution (data hosted with the vendor?) This will dictate the deployment method of our Audit Management Solution and services which is needed to compete the IT questions appropriately.

- a. If the City is hosting within a vendor's cloud, are there minimum IT standards or requirements the vendor my need to consider in our review?
- b. Is FedRAMP or StateRAMP a requirement or priority now, or in the future for the City? Link for context. <https://stateramp.org/participating-governments/>

Answer 24: We are open to a hosted or cloud-based solution. We are open to both so long as they support the desired functionality of the system. The cloud may require less internal infrastructure, so it may be preferable.

- a. The minimum requirements are general best practices and industry standards for hosting on the vendor's cloud.
- b. At this time, neither FedRAMP or StateRamp is required.