

## RFP 21-001

### Fourth Addendum – November 12, 2021

#### QUESTIONS SUBMITTED SUBSEQUENT TO THIRD ADDENDUM, WITH ACCOMPANYING RESPONSES

*[Background RFP language provided by questioner, from page 8 of the RFP.]* To be considered, Offerors should submit a complete response to this RFP, using the format provided in Part II, providing twelve (12) paper copies of the Technical Submittal in a separate sealed shipping container, twelve (12) paper copies of the several Cost Submittals (in two or three separate envelopes (depending upon an Offeror's response to the Value Added Services section) enclosed in a single Cost Submittals envelope, as described in Part II, Section II-9), in a separate sealed shipping container, and two (2) paper copies of a Small Diverse Business (SDB) participation submittal in a separate sealed shipping container)...

**Q1:** The close proximity required by several persons to provide hardcopies increases exposure to COVID. If possible, would the Commonwealth please consider revising the response requirements from a paper copy to an all-electronic submission, preferably via email or Portal upload; or alternatively, one (1) paper copy each for the Technical Submittal, Cost Submittal, and Small Diverse Business (SDB) participation submittal with multiple USBs?

**A1:** The Issuing Office believes this is substantively the same inquiry as posed by Question 6 of Addendum 3 (November 5, 2021). For ease of reference, the answer to that question is reproduced here:

Unfortunately, the Issuing Office cannot accommodate either of these requests. Many of the Committee members have expressed a desire to have available to them physical (i.e., paper) copies of the proposals, which they believe will facilitate their review, note-taking, and dialog with other members during proposal evaluation sessions. The Issuing Office is unable to assume responsibility for creating paper copies of complex proposals from versions submitted on electronic media since such a process inevitably carries risk that the resulting physical version could inadvertently deviate in some fashion from the actual proposal intended by the Offeror to be considered by the Committee, to the possible detriment of the Offeror.

The Issuing Office is aware of the challenges presented by the shipping requirement during the time period contemplated by the RFP. Offerors are expected to make their best reasonable efforts to deliver physical proposals by the RFP deadline. The Issuing Office retains the discretion to waive non-material deviances from RFP requirements (including certain deadlines) where no significant competitive advantage is gained from a deviation, where an Offeror has made reasonable efforts to comply, and where waiving the relevant requirement is in the best interests of the Commonwealth by allowing it to consider otherwise meritorious proposals.

*[Background RFP language provided by questioner, from page 37 of the RFP.]* Describe, from a hardware and software perspective, the primary platform(s) under the direct and indirect control of the Offeror that it will use to manage the data described in this section of the RFP, specifically those platform(s) directly utilized by Treasury and L&I, e.g., processing Cardholder enrollments and deposits from Treasury, and Treasury and L&I accessing

Cardholder account information. The Offeror must be able to demonstrate how its system will meet the demands of high-volume transactions, while still faithfully following the necessary security procedures and protocols.

**Q2:** Will the State be agreeable to using the offeror's standard file formats or will the offeror be required to use the current State file formats? If the offeror is required to use the current State formats, how many?

**A2:** The referenced RFP language seeks information about Offerors' capacity to handle significantly high volumes of transactions while also following protocols necessary to preserve security and protect confidential information. The RFP asks for details about hardware and software applications that each Offeror will utilize to meet these demands, including specifically platforms that Offeror will utilize to process cardholder enrollments and deposits, and platforms it will make available to Treasury and L&I to access certain data elements. File formats do not appear to be implicated by the RFP request, or the nature of response and information it requests. The Issuing Office remains open to further inquiry about the RFP request if additional clarification is required.

Nonetheless, to the extent that an Offeror believes information relating to file formats is relevant to this RFP request, the Issuing Office believes that its answer to Question 5 of Addendum 3 is responsive. That question similarly sought details about file formats, and asked whether the Commonwealth is "allowing vendors to provide their standard file layouts." For ease of reference, the answer to that question is reproduced below.

Treasury uses a standard, configurable file format. Details will be discussed and agreed to after contract award as part of overall technical specifications. Offerors should not assume that their standard file layouts will be acceptable in their entirety. It is also worth noting, however, that Treasury/L&I have successfully negotiated prior contracts for these services with three different providers, encountering few if any significant challenges in establishing acceptable layouts/ contents/formats for the files to be transferred between the parties in each instance.

*[Background information provided by questioner from page 53 of the RFP.]* Offeror shall provide to a limited number of Treasury staff a designated telephone number so that Commonwealth **customer service staff can directly transfer a Cardholder to a CSR** specialist. The Offeror shall allow staff to participate in the discussion following the transferred call-in order to assist the Cardholder, with the Cardholder's permission.

**Q3:** Can the State provide examples where this functionality would be required? Can the State provide the metrics associated with this function?

**A3:** Treasury has reviewed its use of this functionality under the current contract and determined that the frequency of resort by the Treasury customer service staff to conducting a warm handoff of a Cardholder to a vendor CSR specialist has been insufficient to warrant retaining this requirement. Offerors are notified that they are no longer required, as an element of their proposals, to agree to provide a designated telephone number for this purpose.

*[No background RFP language provided]*

**Q4:** An important factor in the consideration/viability of unemployment insurance benefit prepaid card payment programs is the makeup of the “spend mix” on how cardholders use the funds loaded onto the card. The current transaction mix of the program is high with 63% of the spend coming off the card in ATM/Teller/Card to Bank transfers. Would the Commonwealth be willing to provide/collaborate on messaging or marketing to help reduce the amount of cash/card to bank transactions?

**A4:** Treasury will support initiatives to educate cardholders on the advantages of the robust menu of services – including management of (and ready access to) cash, bill paying, purchasing power, etc., -- available through the EPC that is provided by the selected Offeror. In addition, Treasury will constructively engage with the selected Offeror during transition and contract implementation toward developing both an overall communications strategy and particularized messaging addressing specific topics.