

Request for Proposal
Constituent Relationship Management Software Services for Kansas Legislature
2024

Questions and Answers

(Answers in Red)

June 21, 2024

1. RFP section 4. *Deadlines* (page 22): Given summer vacation schedules, would you please consider delaying the proposal deadline by two weeks?

A. We are on a tight time schedule, so extension of the due date to later in August is not feasible. As you will see in the “Deadlines” section, on page 22 of the RFP, those are the dates the Legislature has set, by proviso language in the appropriations bill, to implement the CRM software services.

The specific proviso language for FY 2024 states “*Provided*, That expenditures shall be made from this account by the above agency (Legislature) to issue a request for proposal by June 1, 2024, for a constituent relationship management software service to assist in decreasing response time for both staff and constituents, to encrypt data in transit to ensure constituent privacy, track casework through completion and include integrations with existing systems.”

Additionally, proviso language for FY 2025 states “*Provided further*, That expenditures shall be made from this account by the above agency (Legislature) for the legislative coordinating council to review all proposals for a constituent relationship management software service submitted pursuant to the provisions of section 25 with the director of legislative services: *And provided further*, That the request for proposal issued pursuant to the provisions of section 25 shall close on July 31, 2024: *And provided further*, that the legislative coordinating council shall approve or reject a contract for such services on or before August 31, 2024, with the expectation that the service, if approved, will be implemented on or before December 1, 2024, for use by all legislators.”

2. RFP section 2.1 *Submission of Proposals* (pages 8-9): Would you please consider allowing submission of proposals by email or FTP upload?

A. We will accept either hard copy and flash drive submissions, or email of the technical and cost proposals. If the vendors feel comfortable sending cost proposals through email, we will accept that type of submission, as long as submitted in .pdf format. Proposals are due on or before the closing date, July 31, 2024, 5:00pm.

3. RFP sections 2.2 *Proposal Format* and 4. *Specifications* (pages 9 & 22): Section 2.2 states, “Bidders are instructed to prepare their Technical Proposal following the same sequence as the RFP: and then proceeds to list out items 2.3 – 2.14. In section 4. Contents of the Proposal, it states that “Each responder shall provide a technical proposal in the order specified below:” and proceeds to list an order that is different from section 2.2 instructions. Will you please clarify the order that the technical proposal should follow?

A. Section 2 should be the primary format for response, which will, for all intents and purposes, cover the details outlined in Section 4-contents of the proposal.

4. RFP section 4. *Preferred Requirements, item 18* (page 21). Is the vendor expected to provide the pre-populated data source, or will the Kansas Legislature provide a voter registration file?
A. **The Legislature will provide the voter registration file, from the Secretary of State's office, which will be updated on a regular basis.**
5. RFP section 4. *Preferred Requirements, item 37* (page 22). What version of Exchange/outlook is used by the Legislature? Are you utilizing M365?
A. **We are in the process of migrating to MS-365 in the cloud that will start hopefully in July. Currently, we are in hybrid mode with 2019 Exchange servers on premise and will be until the migration is complete. We plan to be in the MS-365 cloud before January 2025, barring no unforeseen issues during migration.**
6. *General Question:* Are the vendor questions and answers released in 2023's RFP still accurate and applicable to this solicitation?
A. **In most instances, specifically to the technical aspects of the requirements, the answers are applicable to this solicitation.**

July 17, 2024

1. Under Section 4, can you please provide details of the desired "integration with existing communication tools"? Which specific existing communication tools? Existing communication tools would be Microsoft Outlook, Gmail, Yahoo, etc.
The existing communication tool used on state issued equipment is Microsoft Outlook 365.
2. Can you please specify the desired limits of data sharing among the 165 Legislator Offices or caucuses, if any? **Not aware of data sharing between legislators as far as constituent relationship.**
3. What is the total Period of Performance (POP) of this contract? **The period of performance would be annual subscription or whatever the vendor might propose for best cost.**
4. Is there a Base Period with Option Years? If so, can you please specify the lengths of each? Is Admin/Leg/Casework staff dedicated to a single Legislator or shared across Legislators? If shared, please describe how. **The base period would be annual subscription, with option years if the vendor chooses. The Kansas Legislature is in session from January through April/May each year. The session staff may be assigned to one legislator, or as many as four legislators. Full-time leadership staff are assigned to one legislator holding a leadership role in the House or Senate.**
5. Please confirm if the data will need to be imported into the new CRM system. **Individual legislator district voter registration data would need to be imported into the new CRM system.**
6. Please confirm the source(s) of data for conversion.
7. Please provide details about the size, file structure and format of the legacy data. **The Legislature does not formally have legacy data, however, some legislators may have some data they would like imported into the CRM system.**

8. Please provide more details about the state's budget range for the upcoming RFP. **The Legislature appropriated not to exceed \$1,000,000 for Fiscal Year 2025 for this project.**
9. Please provide a summary of how the state's legacy system does not adequately meet the current business needs of the state legislature. **The Legislature does not have a legacy system.**
10. It is assumed that the Kansas Legislature is planning to use the casework functionality of the new CRM to manage/track incoming constituent requests. Does the Kansas Legislature also require that the new CRM be able to manage/track unique process(es) such as public information requests (PIR) or meeting requests which will require the vendor to build unique data fields and routing options? **At the present time, the Kansas Legislature is planning to use the casework functionality of the CRM to manage/track incoming constituent communications. Public information requests or meeting requests have not been contemplated.**
11. Please confirm if the state has any procurement requirements or contract vehicles that we need to be aware of to participate. **The Legislature does not have additional procurement requirements or contract vehicles.**
12. Please confirm if the state has evaluated or viewed any other vendor's products. If yes, please provide details. **The Legislature viewed a few vendor products after an RFP was issued in 2023. However, no decision for selection of a specific vendor was made at that time.**
13. When does the procurement office expect to award the contract? **Based on language in the appropriations bill, "the request for proposal issued pursuant to the provisions of section 25 shall close on July 31, 2024: And provided further, that the legislative coordinating council shall approve or reject a contract for such services on or before August 31, 2024, with the expectation that the service, if approved, will be implemented on or before December 1, 2024, for use by all legislators".**
14. What is the desired date for full use by the Kansas Legislature? **The expectation that the service, if approved, will be implemented on or before December 1, 2024, for use by all legislators.**
15. How many Project References are requested? **Three project references are requested.**

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1. What is the estimated number of constituent contacts that will be stored in the system? **The number of estimated constituent contacts could be 5,000 to 15,000 per legislator, on average.**
 2. How many different systems will provide constituent profile information? **The Kansas Legislature does not have a legacy system, so the initial information uploaded into the system would be voter registration data**
 3. Besides email, what channels are used for mass communication (e.g. SMS, MMS, etc)? **Email is the primary source of mass communication. Individual legislators may have other channels, used from personal devices.**
 4. What is the estimated total number of emails that will be sent per month? (1 newsletter email sent to 1000 recipients = 1000 emails sent). Please provide the same estimate for any

other channels. Depending on the issues before the Legislature, the numbers could be 100 emails per month, or could be 1,000 emails per month. If the legislators send out electronic newsletters to constituents, the number of emails may be 3,000 to 5,000 per month.

5. Is there a desire to create automated multi-touch behavioral campaigns (new constituent welcome, topic nurture, etc)? This has not been contemplated with the Request for Proposal.
6. Is the state interested in the solution having a self service portal/website where constituents can submit questions directly, search a KB for frequently asked questions/news as well as check the status of questions submitted, sign up for newsletters, etc. to add a new channel to accept requests on top of the existing emails, phone calls, and letters submitted to the state? The RFP is open to vendors proposals with add-on features, as long as they are optional above the required features.
7. Can the state provide an estimate of the total number of communications submitted to the legislature as well as an estimate/breakdown on the quantity in each existing channel mentioned on page 20 of the RFP? (emails, phone calls, letters) We do not track each legislator's phone calls, emails, letters, drop-in visits, so estimating a total number may not be realistic. Speculating on the number throughout a legislative session and interim months between session would be 5,000 to 7,000 number of communications on average per legislator. Kansas has 165 legislators which would be a range of 825,000 to 1,155,000 total number (pure speculation).

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- The Q&A currently states that you will accept electronic submission of the proposals. Which email address should we use? The email proposals should be sent to is tom.day@las.ks.gov
 - Do legislators accept constituent correspondence through a web form or is all constituent correspondence sent directly to their email addresses? Constituent correspondence is sent to legislators email addresses, sent by USPS, phone calls, drop-in visits, etc.
 - We do not see segregation of information in the requirements. Can you confirm that users should only have access to their own district communications and casework? Would legislators only have access to those constituents that reside within their district? Do legislators share staff? The Kansas Legislature is in session from January through April/May each year. The session staff may be assigned to one legislator, or as many as four legislators. Full-time leadership staff are assigned to one legislator holding a leadership role in the House or Senate. Legislators should only have access to their own district communications and those constituent's information within their district, although there may be exceptions.
 - The RFP states that "Vendors should define the level of internal support required to operate and administer the system." Does the Kansas Legislature plan to provide an internal system administrator or should the vendor plan to provide all user administration? The Kansas Legislature would be open to either or a hybrid. System support must be available from the vendor however, the Legislature would also have an internal system administrator.
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- 3. Must have the ability to add phone requests to the product.
 - Can you define a phone request in this requirement? **This would be an ability to manually add information from constituents when they call in with questions, concerns, voicing opinions on pending legislation, etc.**
- 4. Must have the ability to add in-person requests within the product.
 - Can you define an in-person request in this requirement? Is this related to requirement 9? **This would be an ability to manually add information from constituents when they drop into the legislator’s office with questions, concerns, voicing opinions on pending legislation, etc.**
- 6. The product must have the ability to upload existing constituent data.
 - How many offices are currently using any type of CRM software for constituent services? **The Legislature does not have a legacy system for constituent services. Some individual legislators may use some type of CRM software on personal devices, but we do not know what exists from an individual legislator standpoint on personal equipment.**
- 36. The product must include the option for a complete integration with an updated constituent data set...

Is the legislature intent on using voter data from your Secretary of State or are you interested in learning about/pricing for L2 Data that is widely used by vendors in the constituent services market? **We will be using voter data from the Kansas Secretary of State. Vendors may propose other options/features within their CRM systems.**

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Do members of the legislature have existing constituent data that would ideally be migrated to the new system? If so, is that in a standardized format across the legislature, or does each member have their own files and method? **We do not know what existing constituent data exists, or in what format, by individual legislators. The Kansas Legislature does not have a legacy CRM system so the data that would be migrated into a new system would be voter registration data obtained and regularly updated from the Kansas Secretary of State’s office.**

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Section No	Questions	Answers
2.3. Transmittal Letter	As per this section, “any lost or reduced federal matching money resulting from unacceptable performance in a contractor task or responsibility defined in the RFP, contract or modification shall be accompanied by reductions in state payments to Contractor” Would the State be open to give us the	Yes. However, there is no federal money involved with this project.

	opportunity to correct the inconformity in the task?	
3.24. Proof of Insurance	The insurance requirements have not been defined in this section. Could you please elaborate on the required insurance coverages and limits?	There are no set requirements for insurance coverages and limits, just that the vendor carries Worker's Compensation, Public Liability, and Property Damage Insurance. Proof of Certificate of Insurance is only upon request.
3.31. Off-Shore Sourcing	Can the Contractor source work outside of the United States after receiving prior approval from the State?	Preference is given to source work being done in the United States. Any items in question may be negotiable through the contract phase.
6.4. Disclaimer Of Liability	Will the State accept a mutual limitation of liability clause with Contractor's liability limited to no more than two times the contract value?	This is language required in all State of Kansas contracts, pursuant to the Kansas Tort Claims Act.
4. SPECIFICATIONS	Is it the expectation that face to face meetings be scheduled in the system prior to said meeting?	Some face-to-face meetings may be scheduled ahead of the meeting, but some meetings are impromptu with constituents visiting the Capitol.
4. SPECIFICATIONS	Does constituent need the capability to schedule the face to face meeting by themselves (as self-servie)?	Legislators, or assistants, will schedule face to face meetings.
4. SPECIFICATIONS	Does the State have any precedence of considering legislature's availability for scheduling face to face meetings?	Most face-to-face meetings, during the legislative session, are scheduled by legislators, or assistants, based on the availability of the legislator.

<p>4. SPECIFICATIONS</p>	<p>What are volume of the calls and emails occur every month?</p>	<p>We do not track each legislator’s phone calls, emails, letters, drop-in visits, so estimating a total number may not be realistic. Speculating on the number throughout a legislative session and interim months between session would be 5,000 to 7,000 number of communications on average per legislator.</p>
<p>4. SPECIFICATIONS</p>	<p>Please provide a list the types of services the solution should be able to support collection of the case. How does the business process complexity vary by the type of case?</p>	<p>Case information will be manually input into the system based on constituent email, USPS mail, telephone or in-person communications.</p>
<p>4. SPECIFICATIONS</p>	<p>What volume of cases are received on a monthly bases (by services)?</p>	<p>The Legislature does not track the numerous forms of communications which could be a case managed by the legislator or staff, so cannot speculate on the number of cases received on a monthly basis.</p>
<p>4. SPECIFICATIONS</p>	<p>What is the volume of legacy data the State intends to migrate into the new system?</p>	<p>The Kansas Legislature does not have a legacy system that would require the migration of data to a new system.</p>
<p>4. SPECIFICATIONS</p>	<p>Besides the Voter Registration Database, are there any other external systems anticipated to be integrated with the new solution?</p>	<p>Since the Legislature does not have a legacy system, voter registration data is the initial integration data. Some legislators may have data, in one form or another.</p>
<p>4. SPECIFICATIONS</p>	<p>Does the case assignment need to be considered as part of the workflow or will it</p>	<p>Each legislator would assign the consideration of each case, if one is received by a legislator. Kansas legislators</p>

	happen prior to becoming added to the system?	do not have full-time staff, except for those serving in leadership positions.
4. SPECIFICATIONS	Please clarify that the Legislator staff will be the individuals who will be answering the telephones and there is no additional staff that performs nor new staff needed to support this?	The legislator, legislator's session staff, or legislator's permanent staff (in the case of leadership) will be the ones answering the phones, opening emails, letters, or dealing with constituent in-person communications.
Preferred Requirement 31	Can you clarify if emails need to be encrypted? Encrypting emails will require further discussion as this will break email tracking mechanisms within the solution. This requirement cannot be met without further clarification/discussion.	Emails do not need to be encrypted.
Preferred Requirement 29	Is consent management required? It currently is not stated within the requirements but is recommended for subscriptions to newsletters and targeted communications	Consent management would be the favored path for targeted communications and legislator newsletters.
Preferred Requirement 3	Will the solution need to directly integrate with a telephony system? Or does this requirement only define manual recording of phone calls?	The solution does not need to directly integrate with Legislatures phone system. This would be a manual entry. Should the vendor want to propose such system as an add-on feature, the Legislature would welcome such proposal.