

Monday, December 17, 2018

**Responses to Questions Received  
Request for Proposals Project Records and Grants Management System  
Legislative-Citizen Commission on Minnesota Resources (LCCMR)  
Issued November 26, 2018**

The following is a list of questions received regarding the request for proposal (RFP) for the LCCMR (Legislative-Citizen Commission on Minnesota Resources) Online Project Records and Grant Management System and responses. As advised in the RFP, responses have been posted to <http://www.lccmr.leg.mn> by 4:30 p.m. on December 17, 2018.

\*NOTE: All questions are provided as submitted except that in cases where identifying information was included in the question, that information was redacted or genericized for the purpose of posting these questions and responses.

**Question #1**

For geospatial data, is it an absolute requirement for the system to process/display the geospatial data and GIS files?

**Responses to Question #1**

It is not an absolute requirement. The system does not need to have the ability to display or process geospatial data. However, the system must allow for uploading and storing of geospatial data, information, and files for staff to use.

See Appendix I. D. Mapping and GIS Capabilities

D1. The system must have the ability to collect and store geospatial data via upload of geographic information system (GIS) file (e.g. shapefile, well-known text (WKT), keyhole markup language (KML), geoJSON).

D3. The system must have the ability to utilize geospatial data and GIS files to display project information on location maps and existing ENRTF Land Acquisitions Map.

Link to ENRTF Land Acquisition Map <https://www.gis.leg.mn/iMaps/LCCMR/landAcq/>

Currently, LCCMR maps land acquisition and conservation easements and some basic geographic information (i.e. county and region) related to ENRTF funded projects. LCCMR is interested in the prospect of using geospatial data from other types of ENRTF funded projects (e.g. restoration, research, survey and monitoring, water resources, and technical assistance) for mapping geographic areas of impact and for outcome analysis and communications purposes.

LCCMR welcomes proposals that include solutions that improve and enhance the collection, processing, and mapping of geospatial data. While LCCMR's preference is for a system that interfaces with Legislative Coordinating Commission's GIS resources, LCCMR is open to utilizing a vendor-provided solution to manage and use geospatial data.

**Question #2**

What are the potential size of geospatial data files to be stored within the system?

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### **Responses to Question #2**

Geospatial data files from land acquisition projects are typically shapefiles (.shp) and are approximately 2 MB each. Current storage needs for geospatial data files currently does not exceed 100 GB. LCCMR is interested in the opportunity to do more in regards to mapping project outcomes and impacts in the future which may include larger file sizes and greater storage requirements. LCCMR welcomes proposals that have solution to meet current needs and potential future opportunities to use geospatial data to record, analyze and communicate LCCMR projects.

### **Question #3**

Given that our SaaS [software as a service] tool is already developed, how does the requirement to use Bootstrap 4.x framework apply?

### **Responses to Question #3**

The system does not need to be built using Bootstrap. However, when developing proposals for both an off the shelf product or custom built system, the system must have the ability to interface via a RESTful API with our website that is built with Bootstrap 4.x.

The general thinking was to have the LCCMR Online Project Records and Grant Management System pages be similar in behavior and appearance to the LCCMR pages.

### **Question #4**

Do you anticipate any required integrations?

### **Responses to Question #4**

Integration with the LCCMR website is a requirement. See Appendix I I. Querying and Reporting.

I.7. The system must have the ability to interface with the LCCMR website via a RESTful API.

LCCMR would like to be able to update data and information on our website more efficiently—for example, the tables of proposed, selected, and recommended projects shown on the following page: [https://www.lccmr.leg.mn/proposals/2019/2019\\_proposals\\_present.html](https://www.lccmr.leg.mn/proposals/2019/2019_proposals_present.html)

Additionally, LCCMR welcomes solutions to integrate the system with Microsoft Outlook (see Appendix I, G. Correspondence) and current and future geospatial opportunities (see Appendix I, D. Mapping and GIS Capabilities).

Please note, we require that the system will be compatible with other Microsoft Office products (see A. Data Management and Internal Tracking; B. System Interface, etc.).

### **Question #5**

Which AP[!] System do you use?

### **Responses to Question #5**

LCCMR's preference is for a system that uses a RESTful API and JSON format.

### **Question #6**

Given the emphasis on ease of use, our admin training is provided remotely and through video tutorials. Applicants and reviewers typically need no formal training. Is on-site training for all users mandatory?

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**Responses to Question #6**

On-site training for LCCMR staff is preferred but not required. On-site training for other users is not required. If existing training videos or resources for users are available, please include an explanation of these training tools in the proposal.

**Question #7**

We have our own terms (MSA) [master service agreement] that apply to all our SaaS [software as a service] tools which would have to be accepted—will it be an issue to use our terms? Of course we can consider any of your additions/change requests.

**Responses to Question #7**

Consideration of suggested terms by the vendor would be a part of the agreement negotiation process. LCCMR is open to considering additional terms but advise that it is bound by law to include some of the terms listed in the “general terms and conditions” section of the RFP.

**Question #8**

How many total full administrators will need access to the system?

**Responses to Question #8**

A minimum of two full administrators are required. Depending on the complexity of the system and how levels of access are determined, up to a maximum total of five full administrators may be needed.

**Question #9**

How many limited access users (i.e. read-only grants access, search access, approval workflow input and correspond with applicants)?

**Responses to Question #9**

See below for estimated annual usage. Also refer to page 7 of the RFP IV. System Users

**LCCMR Staff**

2 full administrators

3 staff level access for actions such as review, search, approvals, comments, input data and/or override, and correspondence with proposers and project managers, for all proposals and projects.

**LCCMR Commission Members**

17 will need read only access of all projects at a minimum. Depending on the system, members may also have review and comment or scoring ability for current proposals.

**External Technical Review**

15-35 for actions such as review, comment, and upload of specific proposals

**External Compliance Review**

5-10 for actions such as review and download of all proposals and projects

**Project Proposers**

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150-250 ability to apply, upload files, review proposal, and respond to staff as needed to make revisions to their proposal(s) only.

**Project Managers**

125-175 for actions on their own project(s) such as input data, complete work flow steps, upload files, review, request changes, and respond to staff as needed.

**Question #10**

How many grant application proposal types will you need?

**Responses to Question #10**

Currently all applicants use the same proposal form and the same work plan form (see Appendix II: Current LCCMR proposal and work plan documents). Differences are in what additional documents are needed such as parcel lists for land acquisition proposals and financial capacity documentation for non-profit and private entities.

LCCMR is open to the possibility of more than one form in the sense that certain types of projects and entities have different requirements and for the proposed system or work flow it may be better to have separate forms. At the very least there are certain questions and documents that are only required from certain entities and for certain types of projects that not every proposer will need to answer or provide documents for.

See also Appendix I. System Interface

B. 5. LCCMR would prefer a system to have branching capabilities in online forms to collect different information based on information provided.

**Question #10**

Do your programs differ by region and if so, how do you manage the differences (i.e., with program admins in each region / location)?

**Responses to Question #10**

LCCMR manages a single program related to the Environment and Natural Resources Trust Fund and occasionally other sources of funds that LCCMR administers. Typically, a single RFP is issued each year and all proposals go through the same process and use the same forms. Within the RFP there are several categories and many topics that are tracked to varying degrees but for all intents and purposes there is a single program.

**Question #11**

Are there any additional programs you are planning or interested in (for future state) such as Matching Gifts, Volunteerism, Board Service, Dollars for Doers, Employee Assistance, Disaster Relief, etc.?

**Responses to Question #11**

LCCMR has only one program and does not engage in any of the mentioned programs. At the moment there are no plans to create new programs or to separate the current program.

**Question #12**

What are your current challenges or pain points with the system in place today?

**Responses to Question #12**

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The current system requires piecing together documents and information from Microsoft Outlook, Microsoft Word, Microsoft Excel, Microsoft Access, a simple online form, and local storage, which allows opportunities for errors to occur.

**Examples of the range of challenges include:**

- Incomplete submissions, formatting, spelling, and number and formula errors.
- Due to the variety of types of projects and topics (no two projects are alike), our information and process needs don't nicely fit all users. We often need to make exceptions or modify documents or processes for different situations that are hard to predict.
- Project managers having ability to change parts of the work plans they're not supposed to.
- Having complex procedures for requesting amendments to work plans. Staff needs to easily identify what components of work need to change, assess the impact of a change on the outcomes, timeline, and budget, and be able to approve some requested changes and not others.
- Staff being able to easily assess how projects are progressing relative to their stated outcomes.
- Project managers having to enter information multiple times in multiple places, and not knowing which fields need to be updated when.
- Not having the ability for the project managers to use the correct /most current versions of work plans.
- No consistent way to track or compile outcomes and accomplishments.
- No simple way to search all projects for information—e.g. how many projects of this type or addressing this topic have we funded in the past? How many proposals did we receive from local units of government this year? How does that compare to previous years?
- Tracking multiple projects for multiple years with varying end dates and easily identify the date of when to send reminders for updates, final reports, initial land acquisition reports (for land acquisition projects), requests for overdue updates & reports etc.
- Being able to easily determine the status of a work plan submission (Submitted? Being reviewed? Waiting for project manager response? Lost somewhere?).
- Having to manually remediate documents to make them ADA accessible/compliant with Minnesota [State Accessibility Standards](#) that are based on [Section 508](#) and [WCAG 2.1](#).

**Question #13**

Would you be able to elaborate on the project management capabilities that would be expected from the system? For example, should the system be capable of creating a project plan and assigning resources?

**Responses to Question #13**

There is a limited need for the system to have project management capabilities. LCCMR does not manage projects and the current system is not intended to be used by proposers/project managers as their means of project management. There is no need to generate a project plan and assign resources. However, the system would ideally be able to direct users to the logical next step in the typical LCCMR funding, reporting and approval process, either explicitly or intuitively.

There are various aspects of work flow management that LCCMR expects to improve through this system -- for example, we expect needing to assign projects (and potentially tasks) to different LCCMR staff or for Project Managers to assign subproject managers (Appendix I. Data Management and Internal Tracking A.15).

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LCCMR has a well-established process and documents that all projects use, but also welcomes proposals that provide opportunities to improve work flow management at the staff and proposer/project manager levels. All projects use the same document templates. The work plan is the primary document that LCCMR staff and proposers use for monitoring and reporting purposes throughout the project life cycle.

Currently users submit a proposal/work plan that communicates how the funds received will be spent, what activities will take place in order to complete the project, expected outcomes, completion dates for outcomes, activities and final report, and a schedule of project reporting and status updates.

LCCMR welcomes proposal that provide greater ability for proposers to manage reporting requirements for their projects as it relates to LCCMR and solutions that will improve LCCMR staff ability to manage work flow of all projects such as keeping track of project updates, amendments, and communications with proposers.

### **Examples of project management needs**

#### In terms of users (proposers and project managers)

These users need to be able to easily navigate the system to communicate their project and provide required information such as activities, outcomes, accomplishments that can be reported in terms of status, progress, and results. The system should facilitate a reporting schedule and submission of project updates and amendment requests.

LCCMR expects a system that will allow for and facilitate a way for users to break their project into logical and meaningful elements for reporting on progress and outcomes in a way that staff can readily evaluate if the project is on track, is doing what they said they would do, and that helps staff quantify or synthesize outcomes.

#### In terms of LCCMR staff

Staff need to be able to readily evaluate a project's progress in terms of activities and outcomes and in terms of reporting on project status. Staff need to be able to manage the progress and status updates of all projects as a whole. LCCMR expects a system that will facilitate review of individual projects as well as provide a ready means of assessing projects as a whole, for example is an individual project on track and how many and which projects are due for status updates.

### **Question #14**

Are you looking for a solution to support programs for both corporate/foundation grants and employee giving?

### **Responses to Question #14**

No. The LCCMR does not solicit or award corporate/foundation grants and does not participate in employee giving.

There are currently three sources of funds that we award through our process as either direct legislative appropriations to state agencies or appropriations to an agency. That agency then provides a grant to a non-state entity (including federal, county, and local units of government, and private and non-profit

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entities). Then the non-state entity will submit work plans and updates to LCCMR. All LCCMR projects use the same process, documents, and system regardless of the funding source. However, the source of funds need to be uniquely identified within the system for the different projects.

**Question #15**

Do you have software in place today for employee engagement?

**Responses to Question #15**

No. The LCCMR does not do employee engagement. This element is not needed as a part of the project management system.

**Question #16**

What are your current methods of fund distribution to charitable organizations?

**Responses to Question #16**

Funds are distributed through the executive branch of Minnesota government by the Minnesota Management and Budget Office in their capacity as fiscal agent/treasurer for the State. LCCMR does not administer the distribution of funds. LCCMR manages the process of review and evaluation of proposals, the legislative appropriation process, and monitoring of projects through completion. Non-state entities must submit reimbursement requests to the state agency managing the grant. Reimbursements cannot be made until work plan updates and amendment requests are approved by LCCMR. There is therefore a need for access by non-LCCMR personnel to verify status of multiple projects (see External Compliance Review by Non- LCCMR Personnel p. 7 of RFP and Answer #9 above).

**Question #17**

How much do you expect to distribute (total dollars and volume) over the next 12 months via foundation grants and / or employee programs? And what is the expected volume of contributions by size?

**Responses to Question #17**

Currently, approximately \$50 million is available for distribution annually and approximately 60-80 projects receive funding each year. There is otherwise no minimum or maximum request amount for individual projects.

**Question #18**

Do you expect to distribute funds internationally?

**Responses to Question #18**

No.

**Question #19**

Do you have a timeframe in place for go to market?

**Responses to Question #19**

For the system to align with the LCCMR RFP process, we would ideally want to be ready to accept new applications on the online system in January - March 2020. Otherwise, the preference would be to start integrating existing projects by March 2020 and then be able to accept proposals for the RFP the following year (January 1, 2021). The scenario of a viable system accepting new application by January – March 2020 is strongly preferred.

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**Question #20**

How long has this system been a priority?

**Responses to Question #20**

Having an online system has been a priority for multiple years and is currently a high priority for the LCCMR.

**Question #21**

How this RFP is different than the RFP issued in 2016 or is it the same? If our company applied to that RFP. Is there any advantage or disadvantage to responding to this RFP?

**Responses to Question #21**

The major difference is that we are open to accepting either an “off the shelf” system or a customized system under the current RFP. Additionally, a clearer emphasis has been put on the need for the system to produce reports that meet [Minnesota State Accessibility standards](#) that are based on [Section 508](#) and [WCAG 2.1](#). . There is no advantage or disadvantage for companies to submit a proposal again.

**Question #22**

In the third paragraph of section III, page 6 of the RFP, the LCCMR references a custom platform that was developed for another legislative commission “for example Lessard-Sams Outdoor Heritage Council’s at <https://www.lsohcprojectmgmt.leg.mn/>”. Is it possible to schedule a demonstration of this system? If so, when?

**Responses to Question #22**

The example is for reference to a legislative funding program that is similar to LCCMR and has a similar process for proposal selection and project monitoring. There is a video on the “Program Manager Information and Resources” page under Watch Now called Draft Accomplishment Plan Video Guide that provides a view of the LSOHC system.

The video can also be accessed at: video <https://www.lsohc.leg.mn/media/AP%20module.mp4>

Although there are similarities between the LCCMR and LSOHC programs, LCCMR has a greater diversity of projects that are not addressed in the LSOHC system. The video provides a view of an example online system that was built for a similar program but is not the exact system LCCMR is looking for.

An additional resource for more insight into the LCCMR is the 2019 RFP Webinar found on the funding process page at [https://www.lccmr.leg.mn/funding\\_process/process\\_2019.html](https://www.lccmr.leg.mn/funding_process/process_2019.html)

Staff will not be providing a demonstration of the LSOHC system.

**Question #23**

I am inquiring about the Voluntary Product/Service Accessibility Templates required with the submission of a response to the RFP for Project Records and Grants Management System. I’m having trouble locating the document that needs to be completed. I’ve clicked on the link provided and navigated the website but all that seems to come up are the guidelines (not the template).

These requirements are listed on Page 13 of the RFP:

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Responders must complete the Voluntary Product/Service Accessibility Templates (VPAT), (508 VPAT and WCAG 2.0 VPAT). See the “Procurement” tab at <https://mn.gov/mnit/programs/accessibility/it-procurement.jsp> and go to the “Products” tab then go to “VPAT 2.0 site (via ITIC). This component of the Proposal should demonstrate the Responder’s capabilities in regards to supporting the [State of Minnesota’s Accessibility Standards](#). The Responder can also provide their Accessibility Maturity Roadmap that spells out how and when accessibility improvements are incorporated into their solution. Submitted VPAT(s) will be incorporated into the contract that results from this solicitation, if awarded.

### **Response to Question #23**

**UPDATE: Responders only need to complete and submit VPAT2.2508. The following provides further guidance for locating the template.**

Start at this State of Minnesota website:

<https://mn.gov/mnit/about-mnit/accessibility/it-procurement.jsp>

Under the “Products” tab, you will see a link to “VPAT 2.0 site (via ITIC)”:

<https://www.itic.org/policy/accessibility/vpat>

From there, scroll to the very bottom of the page where you will be able to access and download the template required for submission as part of your proposal:

[VPAT2.2508 - July2018](#) (August 14, 2018)