

**Commonwealth of Virginia
Department of Human Resource Management
Financial Processor and Donor Management
RFP # CVC17-01**

**Addendum # 1
July 15, 2016**

Please sign this form and include as a part of your submission.

X_____

This addendum addresses all questions received through Wednesday, July 13, 2016.

NOTE: Please change all instances in the RFP of Department of Minority Business Enterprise (DMBE) to Department of Small Business and Supplies Diversity (DSBSD)

- 1 – For the systems requirements; are you looking for a custom system or something that is on the shelf which the contractor will manage the donations? Or will you need software development along with managing the donations?**

This could be a custom system or off-the-shelf product only if it meets all the functionality in the RFP document. DHRM does not own the current software.

- 2 – Will you require an online based system compared to a computer installed system?**

DHRM prefers an online-based system assuming the confidentiality and secure needs could be met.

- 3 – Do you have a contractor providing this service now?**

Yes.

- 4 – With the requirements that are mandatory and desirable; in Section 1.0 “Establish an agency organizer level portal for uploading of documents and communication the processing center. (Desirable)”. Is that what you consider something like a share point application for that or is it just a secure of data that you’re looking for that specific instance? (Basically documents, spreadsheets, reports, transfer of pledge cards or any type of correspondence like that?)**

SharePoint is not our preferred tool. Currently most of the program documents are mailed to the processor. DHRM would prefer a digital transfer of data.

- 5 – Then in the other operative area “Establish and operate a public facing online charity application system with conditional requirements from previous year data. (Desirable)” Currently you’re doing a charity qualification system through your office and with that the charities register those are already qualified for this year so those agencies will move forward with processing. So will we be looking at a communication at the end of the campaign through a portal to those organizations that have been qualified?

DHRM would like an automated response to the email address on the application to inform applicants of the acceptance of their application and also to those who failed to meet the criteria to know of the rejection status and which criteria was not met.

So you want some type of portal that could get their information for whatever structure it may be?

Yes with security so they only get their information.

- 6 – With the electronic processing piece of it, I need some clarification. Currently there are several electronic sites being operated at state agencies is the desire to consolidate those electronic portals into one or is the desire to maintain those electronic portals and allow that type of information to transfer into the database? Could you clarify if you want to maintain that structure?

DHRM is working to come up with a standard-format Excel spreadsheet for the submission of data to a processor.

- 7 – So you are not looking for a system wide solution for electronic pledge processing? You want to maintain the existing multi-site solution and have a shared portal or share point to send a standard data set to the database of record from those organizations?

DHRM will continue to receive many pledges on paper documents and want to move toward a solution that encourages agencies to submit electronically.

- 8 – How does the charity piece get into those systems? Would that be the responsibility of the physical processor to deliver that to the data processor to delivery that to the electronic sites?

Currently the charity application is an online proprietary system in our agency and we transmit the final application information to the processor once they are approved.

- 9 – Will the charity qualification portal still remain with the state or will the qualification go to the vendor?

At this time, it will remain with the state.

10 – Do you still want the organizations that were doing this processing to be a charity of record 501(c)(3) organization?

The third party vendor is not required to be a 501(c)(3) organization. The charity applicants must be a 501(c)(3) organization.

11 – Regarding the process of cash and check collections; how are these being done now and how do you want the contractor to handle that? That is something that is available to the physical processor to process?

Most agency coordinators deposit the cash and checks into a CVC organizational bank account. However, some agency coordinators will send money to the processor and it will have to be deposited by them in the same financial institution.

12 – Is CVC seeking a solution and also a company to manage staff and campaign on a day to day basis?

No – DHRM manages staff and campaign details for the state. However, the vendor providing the system would also be expected to handle their staff and equipment to process the pledge documents, disbursements, and reporting.

13 – Award slated for August 15th and CVC expects an enterprise level solution to be live by the campaign kick off on the 5th of October?

Yes – with the exception that some reporting requirements may be deliverable in November.

14 – Regarding money collected; do you want the contractor to manage that?

See #11 above.

15 – Are there any specific licenses required to do this service?

Must be eVA registered

16 – Regarding data from other institutions; does that mean other institutions other than the Department of Human Resource Management?

There are approximately 135 state agencies other than DHRM that will be sending data, documents, and money.

17 – How many users on your end do you think will have access to this system in regards to employees? What number would be involved with the administrative piece of it?

Not more than 4 for both questions.

18 – Will the employees also need access to this system?

No, other than DHRM staff assigned.

19 – So the front facing online charity applications are for the charities?

Yes and for this office.

**Responses supplied by
Anne Dinterman
Director, Office of Employee Programs
Department of Human Resource Management**

July 14, 2016

RFP # CVC17-01
Financial Processor and Donor Management
Optional Pre-Proposal Conference

Login Sheet

Wednesday, July 13, 2016 at 10:00 a.m.

1 - William Reid Charitable Pledge Proc, LLC
breid@CPSquared.org

2 - Linda Brown, LNB solutions LNBrown@LNBsolutions.com
(757) 644-1344



CHARITABLE PLEDGE
PROCESSING, LLC

P.O. Box 12906
Norfolk, VA 23541-0906
phone: 757.321.2760, ext. 116 fax: 757.321.2773

Bill Reid
President



Linda N. Brown
MBA, CGFM, CGAP

1545 Crossways Blvd., Suite 250, Chesapeake, VA 23320

(757) 644-1344 LNBROWN@LNB SOLUTIONS.COM
(757) 644-1345 LNB SOLUTIONS.COM