**State** of Nebraska (State Purchasing Bureau)

## REQUEST FOR INFORMATION

RETURN TO:

State Purchasing Bureau

1526 K Street, Suite 130

Lincoln, Nebraska 68508

Phone: 402-471-6500

|  |  |
| --- | --- |
| SOLICITATION NUMBER | RELEASE DATE |
| RFI 8675309 | July 31, 2017 |
| OPENING DATE AND TIME | PROCUREMENT CONTACT |
| August 31, 2017 2:00 p.m. Central Time | Robert Thompson |

This form is part of the specification package and must be signed in ink and returned, along with information documents, by the opening date and time specified.

PLEASE READ CAREFULLY!

|  |
| --- |
| SCOPE OF SERVICE |

The State of Nebraska, Administrative Services, Materiel Division, State Purchasing Bureau, is issuing this Request for Information RFI 8675309 for the purpose of gathering information on current Text Messaging Solutions.

Written questions are due no later than August 13, 2017, and should be submitted via e-mail to as.materielpurchasing@nebraska.gov. Written questions may also be sent by facsimile to (402) 471-2089.

Bidder should submit one (1) original of the entire RFI response. RFI responses should be submitted by the RFI due date and time.

Sealed RFI responses should be received in State Purchasing Bureau by the date and time of RFI opening indicated above. No late information will be accepted.

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1. SCOPE OF THE REQUEST FOR INFORMATION

The State of Nebraska, Administrative Services (AS), Materiel Division, State Purchasing Bureau (hereafter known as State Purchasing Bureau), is issuing this Request for Information, RFI 8675309 for the purpose of gathering information on current Text Messaging Solutions.

**ALL INFORMATION PERTINENT TO THIS REQUEST FOR INFORMATION CAN BE FOUND ON THE INTERNET AT:** <http://das.nebraska.gov/materiel/purchasing.htm>l

* 1. SCHEDULE OF EVENTS

The State expects to adhere to the tentative procurement schedule shown below. It should be noted, however, that some dates are approximate and subject to change.

|  |  |  |
| --- | --- | --- |
| **ACTIVITY** | | **DATE/TIME** |
| 1 | Release Request for Information | July 31, 2017 |
| 2 | Last day to submit written questions | August 13, 2017 |
| 3 | State responds to written questions through Request for Information “Addendum” and/or “Amendment” to be posted to the internet at:  <http://das.nebraska.gov/materiel/purchasing.html> | August 18, 2017 |
| 4 | RFI opening  Location: State Purchasing Bureau  1526 K Street, Suite 130  Lincoln, NE 68508 | August 31, 2017  2:00 PM  Central Time |
| 5 | Conduct oral interviews/presentations and/or demonstrations (if required) | To Be Determined |

1. RFI RESPONSE PROCEDURES
   1. OFFICE AND CONTACT PERSON

Responsibilities related to this Request for Information reside with the State Purchasing Bureau. The point of contact for the RFI is as follows:

Name: Robert Thompson

Agency: State Purchasing Bureau

Address: 1526 K Street, Suite 130

Lincoln, NE 68508

Telephone: 402-471-6500

E-Mail: [as.materielpurchasing@nebraska.gov](mailto:as.materielpurchasing@nebraska.gov)

* 1. GENERAL INFORMATION

A subsequent Request for Proposal (RFP) may not be issued as a result of this RFI. There will not be a contract as a result of this RFI and the State is not liable for any cost incurred by vendors in replying to this RFI. If an RFP is issued, the information provided will assist the State of Nebraska in developing the Request for Proposal. This RFI does not obligate the State to reply to the RFI responses, to issue an RFP, or to include any RFI provisions or responses provided by vendors in any RFP.

* 1. COMMUNICATION WITH STATE STAFF

From the date the Request for Information is issued and until RFI opening (as shown in the Schedule of Events), contact regarding this RFI between potential vendors and individuals employed by the State is restricted to written communication with the staff designated above as the point of contact for this Request for Information.

The following exceptions to these restrictions are permitted:

* + 1. Written communication with the person(s) designated as the point(s) of contact for this Request for Information;
    2. contacts made pursuant to any pre-existing contracts or obligations; and
    3. State-requested presentations, key personnel interviews, clarification sessions, or discussions.

Violations of these conditions may be considered sufficient cause to reject a vendor’s response to the RFI. No individual member of the State, employee of the State, or member of the Interview Committee is empowered to make binding statements regarding this RFI. The State of Nebraska will issue any clarifications or opinions regarding this RFI in writing.

* 1. WRITTEN QUESTIONS AND ANSWERS

Any explanation desired by a vendor regarding the meaning or interpretation of any Request for Information provision should be submitted in writing to the State Purchasing Bureau and clearly marked “RFI Number 8675309; Questions”. It is preferred that questions be sent via e-mail to as.materielpurchasing@nebraska.gov Questions may also be sent by facsimile to 402-471-2089, but should include a cover sheet clearly indicating that the transmission is to the attention of Robert Thompson, showing the total number of pages transmitted, and clearly marked “RFI Number 8675309; Text Messaging Solutions Questions”.

It is recommended that Bidders submit questions sequentially numbered, include the RFI reference and page number using the following format.

|  |  |  |  |
| --- | --- | --- | --- |
| Question Number | RFI Section Reference | RFI Page Number | Question |
|  |  |  |  |

Written answers will be provided through an addendum to be posted on the Internet at <http://das.nebraska.gov/materiel/purchasing.html> on or before the date shown in the Schedule of Events.

* 1. ORAL INTERVIEWS/PRESENTATIONS AND/OR DEMONSTRATIONS

The State reserves the right to conduct oral interviews/presentations and/or demonstrations if required at the sole invitation of the State.

Any cost incidental to the oral interviews/presentations and/or demonstrations shall be borne entirely by the vendor and will not be compensated by the State

* 1. SUBMISSION OF RESPONSE

The following describes the requirements related to the RFI submission, handling and review by the State.

To facilitate the response review process, one (1) original of the entire RFI response should be submitted. RFI responses should be submitted by the RFI due date and time.

**A separate sheet must be provided that clearly states which sections have been submitted as proprietary or have copyrighted materials.** RFI responses should reference the request for information number and be sent to the specified address. Please note that the address label should appear as specified on the face of each container. If a recipient phone number is required for delivery purposes, 402-471-6500 should be used. The Request for Information number must be included in all correspondence.

* 1. PROPRIETARY INFORMATION

Data contained in the response and all documentation provided therein, become the property of the State of Nebraska and the data become public information upon opening the response. If the vendor wishes to have any information withheld from the public, such information must fall within the definition of proprietary information contained within Nebraska’s public record statutes. All proprietary information the vendor wishes the state to withhold must be submitted in a sealed package, which is separate from the remainder of the response. The separate package must be clearly marked PROPRIETARY on the outside of the package. Vendor may not mark their entire Request for Information as proprietary. Failure of the vendor to follow the instructions for submitting proprietary and copyrighted information may result in the information being viewed by other vendors and the public. Proprietary information is defined as trade secrets, academic and scientific research work which is in progress and unpublished, and other information which if released would give advantage to business competitors and serve no public purpose (see Neb. Rev. Stat. § 84-712.05(3)). In accordance with Attorney General Opinions 92068 and 97033, vendors submitting information as proprietary may be required to prove specific, named competitor(s) who would be advantaged by release of the information and the specific advantage the competitor(s) would receive. Although every effort will be made to withhold information that is properly submitted as proprietary and meets the State’s definition of proprietary information, the State is under no obligation to maintain the confidentiality of proprietary information and accepts no liability for the release of such information.

* 1. REQUEST FOR INFORMATION OPENING

The sealed responses will be publicly opened and the responding entities announced on the date, time, and location shown in the Schedule of Events. Responses will be available for viewing by those present after the opening. Vendors may also contact the state to schedule an appointment for viewing RFI responses.

1. PROJECT DESCRIPTION AND SCOPE OF WORK

The State wishes to procure a Text Messaging Solutions for use in communicating with constituents. The overall goal is to improve communication to better assist the public by providing a more efficient means of communication.

* 1. PURPOSE AND BACKGROUND

The purpose of the Request for Information (RFI) is to collect information on current Text Messaging Solutions. Usage for text messaging is planned for various customer events/transactions including but not limited to: interviews, verification and review/recertification due reminders, and notifications when a notice is posted to the constituent’s account. Texting will reduce the need to send out paper notices to customers.

The State is interested in sending text messages to specific individuals for: Appointment Reminders (court dates, genetic testing or hearing dates), Early Intervention Outreach: Says we are trying to reach you, Missed/Late Payment – Support Payments, Recovery, Payment is Due, Money On Hold, Payment Received.

The State is interested in sending a text message to an Agency defined target group for: Surveys, announcements, job fair reminders, appointment reminders, Review/Recertification due, Verification due, SNAP benefits loaded on EBT card.

* 1. CURRENT BUSINESS PRACTICES AND ENVIRONMENT

Current communications with clients include emails, phone calls, mail through the post office and/or faxes.

* 1. SYSTEM OVERVIEW

The backend data that will be used to initiate the texting is housed within Agency application databases located in the N-FOCUS and CHARTS mainframe DB2 systems.

* 1. PLANNED FUTURE ENVIRONMENT

|  |  |
| --- | --- |
| 1. | Two way texting (Ability to send and receive/process text messages) |
| Bidder Response: |
| 2. | Ability for clients to opt in or opt out. All clients will need to opt in to initiate texting service. This will be managed by 1) Agency applications based on interaction with the client 2) Via the texting service on the client phones |
| Bidder Response: |
| 3. | Ability to identify the text message is coming from DHHS specific areas - Child Support, Access Nebraska, etc. |
| Bidder Response: |
| 4. | Ability for client to choose types of text message is received from areas. |
| Bidder Response: |
| 5. | Ability to set the timeframes when text messages are sent to the clients (multiple time zones involved) |
| Bidder Response: |
| 6. | Ability to provide notification to Agency when a text message fails. How many times is it retried? When is it considered an invalid number? |
| Bidder Response: |
| 7. | Ability to send a text without knowing the cell phone provider. |
| Bidder Response: |
| 8. | Ability to limit the number of messages per individual in a specified time frame. |
| Bidder Response: |
| 9. | Ability to produce monthly metric reporting regarding texts sent, failed, successful, etc. for each DHHS program. |
| Bidder Response: |
| 10. | Ability to send messages initiated by source systems (N-FOCUS and CHARTS) |
| Bidder Response: |
| 11. | Ability to store message information (metadata) including: sender name/and or email, recipient name and/or email, sender/recipient phone number, message data and time. |
| Bidder Response: |
| 12. | Ability to retain and search text messages. |
| Bidder Response: |
| 11. | Ability to produce text messages for public records requests and discovery and other business purposes. |
| Bidder Response: |

* 1. INFORMATION SOUGHT

The State requests information from vendors with experience in design, development, and implementation of modern text messaging solutions. This section of the RFI provides questions for vendor responses.

|  |  |
| --- | --- |
|  | Describe how your solution handles message content and delivery scheduling and message routing services to deliver messages via multiple cellular network carriers |
| Bidder Response: |
| 2. | Describe your ability to communicate via API with Agency applications that will send the texting message and list of targeted phone numbers and potentially which long code or short code to use. |
| Bidder Response: |
| 2.a. | Describe the interface/API and the interface types you support. Do you provide any examples/templates web applications? |
| Bidder Response: |
| 2.b. | Do we have the option to query your service for phone number and message status? |
| Bidder Response: |
| 2.c. | Is there capability for your service to push to our secured URL? |
| Bidder Response: |
| 3. | Describe what information is kept in the texting solution database and how long. |
| Bidder Response: |
| 4. | Describe how solution will support the ability to query the Texting Service via an API and provide a report of usage |
| Bidder Response: |
| 4.a. | Total phones texted in a given time period |
| Bidder Response: |
| 4.b. | Number of texts sent to a phone in a given time period |
| Bidder Response: |
| 4.c. | What long/short code sent the text and time of submission |
| Bidder Response: |
| 4.d. | List of phone number opted out and opted out timestamp |
| Bidder Response: |
| 4.e. | Status of any text message sent to any phone number |
| Bidder Response: |
| 5. | Describe the SMS texting and how long codes or short codes are used. |
| Bidder Response: |
| 5.a. | What are the advantages of each? |
| Bidder Response: |
| 5.b. | What is the maximum message length? Is it the same for long or short codes? |
| Bidder Response: |
| 6. | Do you have a secured Administrative Type Portal for the Texting System? If so, describe major functionality. |
| Bidder Response: |
| 7. | Describe how you handle/eliminate spam |
| Bidder Response: |
| 8. | Describe your OPT IN and OPT OUT functionality. |
| Bidder Response: |
| 9. | Costs |
| 9.a. | Describe your licensing model and cost structure. Include total costs, setup and monthly changes? Is there a cost difference between long and short codes? |
| Bidder Response: |
| 9.b. | Do you offer both a random short code and a vanity sort code? What are the total costs, setup, and monthly charges for each and setup time for each? |
| Bidder Response: |
| 9.c. | Do you have an enterprise/volume discount? |
| Bidder Response: |
| 10. | Describe how your solution complies with regulations and SMS marketing best practices – TCPA (Telephone Consumer Protection Act), FCC (Federal Communications Commission), FTC (Federal Trade Commission), MMA (Mobile Marketing Association), CTIA (Cellular Telecommunications Industrial Association). |
| Bidder Response: |
| 11. | Describe any other Federal/State entities using your solutions. |
| Bidder Response: |
| 12. | Describe vendor support for solutions. |
| Bidder Response: |
| 13. | Describe your error handling process when texting fails. |
|  | Bidder Response: |
| 14. | How are software upgrades performed and designed to minimize downtime? |
|  | Bidder Response: |

* 1. Hardware and Software Configuration:

The State of Nebraska may host this solution within the State network. The following questions pertain to minimum hardware requirements to operate a system.

|  |  |
| --- | --- |
| 1. | Provide a description and diagram of your solution including the technical architecture, hardware, and software. |
| Bidder Response: |
| 2. | If the solution is hosted by the vendor, is there any hardware and/or software required on the State’s network? |
| Bidder Response: |
| 3. | If the State hosts your system on Nebraska owned, physical hardware: What is the minimum hardware required to operate your system? Please include any information about central hardware (primary servers, failover servers). |
| Bidder Response: |
| For each server required in the solution, please provide the following information: | |
| 3.a. | Server purpose or component description |
| Bidder Response: |
| 3.b. | Processor requirements |
| Bidder Response: |
| 3.c. | Options for scaling the system component to meet growth needs |
| Bidder Response: |
| 3.d. | Options for achieving high availability for the system component |
| Bidder Response: |
| 4 | If The State hosts your system on Nebraska owned virtual infrastructure: What is the minimum system requirements to operate your system? What virtual environment(s) is/are your solution supported on? Please include information about all system components (primary servers, failover servers). |
| Bidder Response: |
| For each component required in the solution, please provide the following information: | |
| 4.a. | Server purpose or component description |
| Bidder Response: |
| 4.b. | Processor requirements |
| Bidder Response: |
| 4.c. | Storage capacity requirements |
| Bidder Response: |
| 4.d. | Options for scaling the system component to meet growth needs |
| Bidder Response: |
| 4.e. | Options for achieving high availability for the system component |
| Bidder Response: |
| 5 | If your system were to be installed in Nebraska on vendor owned physical hardware: |
| 5.a. | How many servers would be installed? |
| Bidder Response: |
| 5.b. | Would you provide the rack(s) required for the installation? |
|  | Bidder Response: |

* 1. Database Requirements:

|  |  |
| --- | --- |
| 1. | What database structure does your system utilize? Are there any requirements or prerequisites for your solution’s database or database structure? |
| Bidder Response: |
| 2. | Describe how information is secured within your database. |
| Bidder Response: |
| 3. | What type of auditing information is produced and available? |
| Bidder Response: |
| 4. | Describe any process in place for archiving information to database. |
| Bidder Response: |
| 5. | Provide a description of proposed backup and recovery plan. |
| Bidder Response: |

* 1. Electronic Transactions/Interfaces

|  |  |
| --- | --- |
| 1. | Are there best practices or interface standards the State should be considering? |
| Bidder Response: |
| 2. | Are there other interfaces your solution requires/provides which are not identified in this document? |
| Bidder Response: |

* 1. Customer Relationship Management (CRM)

|  |  |
| --- | --- |
| 1. | Are there best practices or interface standards the State should be considering? Does your solution include a CRM function for tracking correspondence and customer touch points? |
| Bidder Response: |

* 1. General

|  |  |
| --- | --- |
| 1. | What timeline would you suggest the State and its stakeholders plan for each of the following: |
| 1.a. | Planning |
| Bidder Response: |
| 1.b. | Development |
| Bidder Response: |
| 1.c. | Implementation |
| Bidder Response: |
| 1.b. | Integration |
| Bidder Response: |
| 2. | What three things about your solution make it different/unique from other solutions/your competition? |
| Bidder Response: |
| 3. | What do you often hear are the three most common complaints/weaknesses of the system you propose? |
| Bidder Response: |

|  |  |
| --- | --- |
| 4. | Describe any training and/or documentation provided with the system |
| Bidder Response: |
| 5. | Describe your ability to support several different environments i.e. Test and Production. |
| Bidder Response: |

# Form A - Vendor Contact Sheet

Request for Information Number 8675309

Form A should be completed and submitted with each response to this solicitation document. This is intended to provide the State with information on the vendor’s name and address, and the specific persons who are responsible for preparation of the vendor’s response.

|  |  |
| --- | --- |
| Preparation of Response Contact Information | |
| Vendor Name: |  |
| Vendor Address: |  |
| Contact Person & Title: |  |
| E-mail Address: |  |
| Telephone Number (Office): |  |
| Telephone Number (Cellular): |  |
| Fax Number: |  |

Each vendor shall also designate a specific contact person who will be responsible for responding to the State if any clarifications of the vendor’s response should become necessary. This will also be the person who the State contacts to set up a presentation/demonstration, if required.

|  |  |
| --- | --- |
| Communication with the State Contact Information | |
| Vendor Name: |  |
| Vendor Address: |  |
| Contact Person & Title: |  |
| E-mail Address: |  |
| Telephone Number (Office): |  |
| Telephone Number (Cellular): |  |
| Fax Number: |  |