

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
Fax: 402-471-2089

SOLICITATION NUMBER	RELEASE DATE
RFI OCIO07262017	July 26, 2017
OPENING DATE AND TIME	PROCUREMENT CONTACT
August 8, 2017 2:00 p.m. Central Time	Nancy Storant

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 OCIO07262017 for the purpose of gathering information to replace the existing tax processing systems of the Nebraska Department of Revenue (NDR) for various tax programs, with an integrated tax processing system.

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.

BIDDER MUST COMPLETE THE FOLLOWING

By signing this Request For Information form, the bidder guarantees compliance with the provisions stated in this Request for Information.

FIRM: _____

COMPLETE ADDRESS: _____

TELEPHONE NUMBER: _____ FAX NUMBER: _____

SIGNATURE: _____ DATE: _____

TYPED NAME & TITLE OF SIGNER: _____

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I. 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 OCIO07262017 for the purpose of gathering information about replacing the existing tax processing systems of the Nebraska Department of Revenue (NDR) for various tax programs, with an integrated tax processing system.

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

A. 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 26,, 2017
2	RFI opening Location: State Purchasing Bureau 1526 K Street, Suite 130 Lincoln, NE 68508	August 8, 2017 2:00 PM Central Time
3	Conduct oral interviews/presentations and/or demonstrations (if required)	August 28 – September 15, 2017

II. RFI RESPONSE PROCEDURES

A. 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: Nancy Storant
Agency: State Purchasing Bureau
Address: 1526 K Street, Suite 130
Lincoln, NE 68508
Telephone: 402-471-6500
Facsimile: 402-471-2089
E-Mail: as.materiel purchasing@nebraska.gov

B. 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.

C. 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.

D. ORAL INTERVIEWS/PRESENTATIONS AND/OR DEMONSTRATIONS

At the State's invitation, vendors will be selected to provide an on-site, two-day demonstration of their software. The demonstration needs to be like a state that the vendor is currently in that has a tax structure that is similar to the State of Nebraska. See the list of tax programs in Attachment A.

In order to respond to the RFI, vendors should submit the following standard marketing materials:

- Product Descriptions
- Company History

- List of states where your software is currently in use and the tax programs supported for those states
- Pricing Structure
- Testimonial

Any cost incidental to the demonstrations shall be borne entirely by the vendor and will not be compensated by the State.

A meeting format and additional questions will be provided at the time the invitations are extended.

E. 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.

F. 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.

G. 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.

III. PROJECT DESCRIPTION AND SCOPE OF WORK

The bidder should provide the following information in response to this Request for Information.

A. PURPOSE AND BACKGROUND

The purpose of this RFI is to replace the existing tax processing systems of the Nebraska Department of Revenue (NDR) for various tax programs, with an integrated tax processing system that:

1. Uses modern technology that is supportable using local resources and can be configured using NDR internal IT resources;
2. Improves all levels of functionality of the existing system and expands services currently provided; and
3. Eliminates existing silos in the current system so that Taxpayer relationship management, Revenue management, and Case management are a single application.

B. CURRENT OPERATIONAL ENVIRONMENT

NDR current has a number of tax processing platforms that include but are not limited to:

- IBM Mainframe
- Oracle
- Enterprise Content Management (ECM) - OnBase
- Web applications (Internal and publicly facing)

C. SCOPE OF WORK

The State is preparing for the acquisition of a commercial off-the-shelf (COTS) software solution for an Integrated Tax System (ITS). All Nebraska taxes administered by the Nebraska Department of Revenue, functions, and funds will be consolidated into the ITS.

The NDR wishes to acquire a COTS product that has a proven track record of success in a jurisdiction of a similar size and complexity to Nebraska's. The COTS product must be one that has minimal need for customization, hard coding, or programming. The NDR does not have the necessary resources or desire to devote time to software programming and expects to keep costs for this service to a minimum.

The product should:

- Provide a single view of a taxpayer.
- Consolidate all major tax types into a single solution with an integrated accounting system or an integrated set of modules.
- Provide a robust web interface for taxpayers to file returns, make payments, and obtain information about their accounts.
- Provide a collections and billings function.
- Have long-term capabilities to easily expand to include future tax types.
- Serve as a catalyst for re-engineering manual workflows and operations.
- Expand and improve reporting capability.
- Increase revenue to the NDR through discovery of unpaid or underpaid financial obligations.

- Support 300 concurrent users (users who are logged into the system at the same time, but not necessarily performing functions) and 5,000 concurrent external users and will have the ability to expand on numbers of concurrent users
- Support all of these taxes: See Attachment A

Form A

Vendor Contact Sheet

Request for Information Number OCIO07262017

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:	