CHEFA
Connecticut Health & Educational Facilities Authority

Client Portal Development and Installation – RFP Response to Questions

Document Reference	Questions	Responses
	1. Is there any budget limit fixed for this project?	Approximately $300,000 This is the budget for development and implementation. It is anticipated that hosting/cloud infrastructure and potential support services would be outside of the above amount.
	2. Are there any constraints on delivery location of the staffed resources?	The Authority has a preference for the delivery location of staffed resources to be in North America.
Attachment B, Section: User Stories, Page No.: 16	3. Please specify the list of internal data systems that need to be integrated with the portal. Could you please mention what are the systems the new portal is expected to interface with? We have seen it is mentioned that the BONDS system, CHEFA.com, and internal and 3rd party systems. 1. However, please mention the list of internal and 3rd party systems for integration. 2. What is the existing mode of integration for each of the internal and 3rd party systems?	• The Authority intranet – MS SQL • Demand data – Postgre, MySQL • Possible 3rd party integration examples – Azure/MS 365, Adobe Sign, *et al*. There are no current integrations between any of these internal systems.

	4. Will this project be procuring Independent Verification & Validation or project support under a future procurement for this project? *[looking to see if and/or when this RFP is launched that at a future time would there be an additional request where a piece or whole of this require Independent Verification and Validation in which an independent third-party check that the solution/service meet specifications and that it fulfills the RFPs purpose]*	No.
	5. Can you please confirm that your expectation is - the portal should automatically push data to internal data systems? Also, what is the desired frequency?	We would like to be able to pull the information into our internal data systems automatically on a nightly basis. This should be able to be performed manually, most likely by system administrative staff.
	6. Do you need to migrate any existing data to the new portal? If yes, what is the overall size of the data? Could you please confirm if data and content migration to the new system is in scope? If yes, please provide the following details 1. Existing databases, data size and number of tables. 2. Existing content (documents) size, number of documents and existing source of documents.	Once implemented we expect to push current data through the automated process or manually to populate the portal. Currently, a process is run nightly to generate the necessary compliance tasks. The content to "migrate" would be the tasks to the client portal and the indication for the fulfillment of the task from the client would need to be returned to the internal database. We are not looking to migrate any pre-existing data, but rather data going forward.
Attachment B, Section: Project Overview, Page No.: 16	7. Could you please confirm if data and content migration to the new system is in scope? If yes, please provide the following details 1. For how long do we need to retain the data 2. For how long do we need to archive the data?	Content migration has been addressed in the response to question 5. Data archiving is an element of this project. There are retention requirements for some documents that are long in duration – life of the bonds – that will be addressed after contracting with a vendor.

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	8. Do you expect the system to have reporting capabilities out-of-the-box? If not, what tool will you use for reporting?	Page 7 of the Project Scope document section labeled Scope: ***Not in Scope -*** *The system is not required to do any data analytics or reporting, but rather be the repository for data and documents.* We have started to introduce SSRS and are open to reviewing other tools for reporting. We do not employ a specific report writing tool. However, we currently use various Microsoft Office tools to create reporting.
	9. Do you have any preference in terms of technologies to develop the portal?	We do not have a preference. Project Scope document page 1 section Integrations: *The Authority would like a solution that integrates seamlessly with Microsoft Azure, to continue to maintain internal and external Role-Based Access Control (RBAC)*
Required Proposal Content #8	10. Do you expect the vendor to suggest any third-party tool for monitoring internet throughput from the ISP, or the desire is that the developed portal itself handle this? If so, what information should be covered under section 8: Monitoring? Kindly explain in short.	Required Proposal Content #8 – please remove required proposal response.
	11. Can we include the W-9 form in the exhibits/attachments section as the response is limited to 10 pages?	Yes.
	12. Do you expect the vendor to provide post-implementation support?	To be determined for a finite period or continuous with selected vendor.
Attachment B, Section: Scope, Page No.: 17	13. It is mentioned that "Hosting will be determined at a later date.", but you require a solution for hosting. So, could you please confirm if the hosting is part of the scope?	If hosting is recommended for your solution, it should be included as part of the scope. The Authority is leaning heavily toward a cloud-based solution.

Attachment A – Required Proposal Content, Page No.: 8	14. How many years of "Technical Support" are you expected? What Levels of Technical support are you expecting from the vendor (Level 1, Level 2, Level 3)?	Please provide the available options for consideration.
Attachment B, Section: Project Overview, Page No.: 17	15. Please specify what are the pain points that you are facing today?	• Turnover in the internal compliance staff position causing external client communications confusion, • Inability to collect client application and ongoing data for analytical purposes, and • Managing user credentials manually each year for changing client staff for demand data submissions.

Background Information, Page No.: 2 Attachment B, Section: User Stories, Page No.: 15	16. Can you please share the expected volumes for the proposed portal? It is mentioned clients of CHEFA as ~106. Could we please also know how many users are you expecting to use this portal? 1. No. of Internal Staffs: a. # of compliance employees: b. # of Impact Data Employees: c. # of Client Sector Demand Data Employees: d. # of Client Applications Employees: e. # of Administrators: 2. No. of External Staffs Number of yearly requests or form submissions and projected YoY increase over the next 5 years. Number of email notifications per year and YoY increase over the next 5 years a. # of compliance clients: b. # of Impact Data Clients: c. # of Client Sector Demand Data Clients: d. # of Client Applications Clients: 3. Number of concurrent transactions that need to be supported	1. The Authority has 18 employees. a. ~2 b. ~5 c. ~3 d. ~4 e. ~4 2. There are no external employees a. ~115 (106 count modified) b. ~100 c. ~115 d. Application volume at this time: The Authority issues bond issues for on average 10 existing clients each year. New clients may be approximately 1 or 2 each year. Each is required to submit an application when seeking to issue bonds. 3. Clients are currently emailed quarterly to provide their compliance submissions. We would anticipate only a moderate fraction of the compliance clients to access the portal at any given time. Please read the Client Compliance Packet Example provided. The first page of the reporting requirements includes a representative list of compliance item examples anticipated from each compliance client. These tasks are generated daily according to specific criteria that determines each due date. However, we currently email this packet to each client on a quarterly basis. Please also see the response to question 18 below additional information.

Attachment B, Section: Project Overview, Page No.: 16	17. How exchange of information happens today between CHEFA's clients and Authority? Do you have an existing portal(s)? Please specify what are the different channels that your clients can give information to you.	Via email for compliance data and via website for demand data. No. There is not true existing portal other than the data entry web page for demand data for our education sectors.
Attachment B, Section: User Stories, Page No.: 15	18. Could you please send us the list of client compliance documents and their samples - avg size of uploaded documents? Number of documents per year and projected YoY increase over the next 5 years	Please read the Client Compliance Packet Example provided. Clients provide the documents to the Authority. At this time, there are less than 50 different task types. • Most certificates, statistics and ratio submissions average 1 page in length. • Financial Reports, budgets and audited financial statements are multiple pages in length ranging from ~2 to ~100. Documents are by entity, with only very few documents that are bond issue specific. Therefore, the increase would relate more to the increase in the Authority's client base – as responded to in question 16: 2.d. (a potential for 1 to 2 additional clients each year).
Attachment B, Section: User Stories, Page No.: 15	19. Could you please send us the samples/format of the following documents? 1. Impact Data 2. Demand Data 3. Client Application form/templates	1. Under development – includes, but is not limited to dates, numerical – dollars and counts, short and long answer, select lists, and yes/no responses. 2. Data rows by fiscal year columns 3. Under development – includes, but is not limited to dates, numerical – dollars and counts, short and long answer, select lists, and yes/no responses.
Background Information, Page No.: 2	20. We understand from the RFP PCI-DSS and HIPPA compliance are not required. Other than this are there any compliance requirement?	Only those to be met by our clients our internal system generates for our clients to maintain.