



**California Joint Powers Insurance Authority**  
**Member Analytic System Request for Proposal**

*Addendum # 1*

October 9, 2009

**RE: Addendum #1 to Request for Proposal (RFP) California Joint Powers Insurance Authority (California JPIA) Member Analytic System**

Dear Participant:

The purpose of this Addendum #1 is to make you aware of changes to some RFP appendices, the addition of new RFP documents, and to provide answers to the questions received.

**REVIEW ALL CHANGES CAREFULLY.**

All other terms and conditions of the procurement remain the same.

Changes to this RFP are as follows:

1. In response to Bidder questions, the following appendices have been updated and are available at [http://www.cjpia.org/4dcgi/MAS\\_RFP/index.shtml](http://www.cjpia.org/4dcgi/MAS_RFP/index.shtml):
  - a. Appendix E - Cost Proposal Workbook
  - b. Appendix I - California JPIA Information Technology Standards
2. In response to Bidder questions, the following RFP Documents have been added to the California JPIA web site ([http://www.cjpia.org/4dcgi/MAS\\_RFP/index.shtml](http://www.cjpia.org/4dcgi/MAS_RFP/index.shtml))
  - a. LMS\_Client-Side Data Import Utility Guide\_v1.3.2\_20090710
  - b. LMS\_GLImpor File Uploader
  - c. LMS\_HR Import Client-Side Importer Supported Fields (6)
  - d. LMS\_RCExternalAuth \*\*\* This document is not specific to the LMS. It is for other software developed by the same vendor, but is indicative of the specifications that the vendor expects to be valid when the capability is available in the LMS.
3. Responses to bidder questions are provided on the following pages of this Addendum.

If you have any questions, please e-mail or call me.

Sincerely,

Chuck Tobia, *on behalf of*  
California Joint Powers Insurance Authority  
8081 Moody Street  
La Palma, California 90623

Phone: (916) 503-1694  
Fax: (916) 914-2280  
E-mail: [mas@cjpia.org](mailto:mas@cjpia.org)

**Questions:**

- 1) **Please let me know how many end users should we consider towards this project, quote?**

**Response:** The approximate number of anticipated users include the following:

1. 25 California JPIA staff using the system regularly for all types of activities.
2. 15 California JPIA vendors using the system occasionally for simple processes such as data updates and report generation.
3. 250 California JPIA members using the system occasionally for simple processes such as simple data updates, generating reports, and accessing the LMS. Rarely these users might incur heavy usage.

- 2) **There are multiple references to retaining information for historical purposes. What are the retention periods for this historical data?**

**Response:** Record retention will be structured to mirror the California JPIA Record Retention Policy. The Policy, which follows the California Government Code, details the retention length based on the type of documentation. Retention periods generally range from two years to permanent. It is anticipated that most data will be retained for approximately five years. The retention policy is currently being revised and is not ready to be shared.

- 3) **Can we get a more concise view of the current technical/environmental topography?**

**Response:** Appendix I – California JPIA Information Technology Standards describes this information. It has been updated in response to this question in order to reflect the most current information available. The updated version will be available on the MAS RFP web page at:  
[http://www.cjpia.org/4dcgi/MAS\\_RFP/index.shtml](http://www.cjpia.org/4dcgi/MAS_RFP/index.shtml).

- 4) **What standards or practices does JPIA employ relative to current external data feeds (in terms of structure, schemas, content, etc)?**

**Response:** The California JPIA does not have external data feeds. Data exchanges are handled manually through import/export routines or FTP downloads. We are excited to create this functionality as part of the MAS project.

- 5) **What is JPIA's licensing agreement with Microsoft? Is there an ELA in place?**

**Response:** We have a licensing agreement for the SBS 2008 and for Office 2007. However, California JPIA does not have an enterprise licensing agreement because it is not cost effective due to our size.

- 6) **Can you provide a current view into the Microsoft toolset deployed within JPIA in terms of usage, versions, upgrade plans, etc?**

**Response:** Information regarding current equipment is included in Appendix I – California JPIA Information Technology Standards. In summary, we are utilizing

Windows XP, Office 2007 Professional, SBS 2008, Exchange 2007, Sharepoint 3.0, SQL 2005, Microsoft Dynamics GP 10, Microsoft Server 2003. If the budget allows, there are tentative plans to upgrade to Windows 7 in 2010-2011 with the purchase of new desktop machines. We plan to deploy MS Office 2010 as part of a software assurance program in mid 2010.

**7) Can you share which version of Microsoft Dynamics is being used?**

**Response:** Version 10.

**8) What are the capabilities and requirements for interfacing with LMS? In particular, we are seeking to better understand the import/export interface for the LMS and the MAS?**

**Response:** There are expected to be three basic categories of interface between MAS and LMS: 1) Retrieving data from the LMS; 2) sending data to the LMS; and 3) using the MAS to manage the single sign-on process with the LMS. None of these types of communication should require customization of GreenLight code, and any customization done to GreenLight code would not be done by the MAS bidder.

Data retrieved from the LMS would include data about the courses completed, the people completing them, and the members the participants represent. This may include data such as: courses completed by individuals; member that an individual was working for when a course was completed; details about the course, such as date, location, duration, instructor, risk management topics covered, and other descriptive fields. The primary purpose of retrieving data from the LMS is so that it can be used in analysis and reports in conjunction with other MAS data, such as loss history and risk management evaluation results.

Data sent to the LMS is expected to be about the individuals participating in training (e.g., name, contact information, member employer, job title, position within the organization).

With the possible exception of the single sign-on process, California JPIA anticipates that periodic interfaces sending data between the LMS and the MAS will be sufficient (i.e., there is no immediate need for real-time data transfer between the two systems).

There are currently two options for data import, and there should be three with the version that California JPIA expects to go live with in the near future. The general information below has been supplied by the LMS vendor to help clarify the alternatives:

1. HR Import: GreenLight can be configured with a company mapping file. This "Pre-Defined" mapping identifies the structure of the csv file to be used, associating csv column data with GreenLight fields. Users can schedule data imports through the HR Import tab by selecting "Add" and pointing to a csv file configured according to the mapping file defined for the company. This method is primarily used to import user profile data

from an external HR system. See “HR Import Client-Side Importer Supported Fields” for information on what fields are supported.

2. Import Utility: This .NET application can be launched from the HR Import tab by selecting “Importer.” This application allows users to dynamically define a “User-Defined” mapping for any csv file. This application is primarily used to bring in legacy course records during GreenLight implementation, but can also be used to import user profile data. See “HR Import Client-Side Importer Supported Fields” for information on what fields are supported and “Client-Side Data Import utility Guide” for instructions on using the importer.
3. Automated Import (not yet available): This is a web services API that can be used to set up an automated import between a company’s HR system and GreenLight to automatically import data on an ongoing basis without the need for Administrator interaction within the interface. See “GreenLight Import File Uploader” for information on this feature.
4. In terms of exporting data, GreenLight allows considerable flexibility. The reporting function allows you to generate reports in exportable data formats such as csv and/or XML. These formats can be used to export data from GreenLight. There are a number of system reports that can be used to export data, or custom reports can be created in either SQL reporting or Crystal Reports to create reports that will export the data exacting how you want it.

Several documents from the LMS vendor have been added to the RFP Documents available on the California JPIA web site at [http://www.cjpia.org/4dcgi/MAS\\_RFP/index.shtml](http://www.cjpia.org/4dcgi/MAS_RFP/index.shtml):

1. LMS\_Client-Side Data Import Utility Guide\_v1.3.2\_20090710
2. LMS\_GLImport File Uploader
3. LMS\_HR Import Client-Side Importer Supported Fields (6)
4. LMS\_RCEExternalAuth \*\*\* This document is not specific to the LMS. It is for other software developed by the same vendor, but is indicative of the specifications that the vendor expects to be valid when the capability is available in the LMS.

**9) What is the infrastructure availability/constraints for internal hosting requirements?**

**Response:** Information regarding current equipment is included in Appendix I – California JPIA Information Technology Standards. We anticipate a need to purchase new hardware to support the MAS, and would like vendors to recommend appropriate hardware. Bidders should recommend an appropriate level of failover and recovery capability. Please see Appendix A (Non-functional Requirements) for California JPIA expectations.

**10) Please further define 'robust analytical capabilities'? Can you please provide a sample(s) of requested capabilities?**

**Response:** Please refer to Appendix A (Functional Requirements) for examples and details of what is meant by this term.

**11) Please further define 'robust reporting generation'? Can you please provide a sample(s) of reports?**

**Response:** Please refer to Appendix A (Functional Requirements) for examples and details of what is meant by this term.

**12) Please provide examples of 'what-if' calculations**

**Response:** We currently have a funding formula that incorporates many factors such as loss experience and total payroll dollars for each member. It also includes the following: estimate of future losses, confidence level, general & administrative costs, investment income, etc. We want to have the ability to quickly manipulate the weightings and nominal values given to these and other variables so that we can perform financial modeling for the pool as a whole, as well as impacts to individual members. In addition to doing "what-if" calculations that involve changing the values of variables, California JPIA seeks the ability to perform "what-if" calculations that involve changing the calculation itself. For example, if the current calculation is "a + b = c," the California JPIA might want to perform calculations with a variation such as "a + (b\*y) =z."

**13) How much documentation is expected to live in the resource library?**

**Response:** The member resource library currently contains over 800 resource records. Each year we add 20-50 new records. Resource records may include text, html links, documents in various formats (PDF, Word, Power Point, etc.), and historical data. If a record's document is updated, for example, the library tracks the history and retains the historical documents.

**14) Is the intent for the vendor to re design the web site? Please confirm that you would expect wireframes and computations as deliverables.**

**Response:** The California JPIA currently employs a part-time graphic/web designer. Aesthetics and layout will be handled by this employee. It is expected that our designer and the vendor will work closely on user interface production during this project, with the designer handling the "front end" and the vendor handling the "back end."

**15) Would you be open to using use cases to further define the requirements? These could then be used to create test cases.**

**Response:** Yes, California JPIA is open to using use cases to further define the requirements. Bidders should propose whatever methodologies they feel are best suited to accomplishing the goals of the project and describe them in the proposal.

- 16) **It is stated that the hourly rates in Worksheet B of the Cost Workbook must be used for the duration of the contract. However, the “Description of Maintenance Pricing Model” in Worksheet A asks to document the pricing model for maintenance years, and implies a different set of hourly rates could be used. Please clarify if California JPIA is open to a pricing model that uses different hourly rates for the maintenance years. (Page 33, ID 51)**

**Response:** California JPIA is open to a pricing model that uses different hourly rates for the maintenance years. The hours in Worksheet B of the Cost Workbook are for development and implementation as well as any enhancements contracted for during initial development and maintenance period. Worksheet A maintenance costs are for ongoing maintenance and can be based on hourly rates or any other approach a bidder chooses.

- 17) **The Cost Workbook does not include a section to itemize any software license procurement costs. If these need to be built into the deliverable and/or hourly rates, this would appear to penalize any vendors proposing COTS components as their true labor costs would not be accurately represented. Would California JPIA consider revising the Cost Workbook to allow for separating service costs from one-time software procurement costs? (Cost Workbook, Worksheet A)**

**Response:** Worksheet D has been added to the Cost Workbook to include a section to itemize any software license procurement costs. Worksheet A has been updated to reflect software license procurement costs as well as related annual fees. The updated Cost Workbook (Appendix E) and will be posted on the RFP web site at [http://www.cjpia.org/4dcgi/MAS\\_RFP/index.shtml](http://www.cjpia.org/4dcgi/MAS_RFP/index.shtml).

- 18) **Given that MS SQL Reporting Services is a commercially available product, could this be considered as meeting BOTH requirements NF-32 and NF-33 if SQL Reporting Services is proposed as the report writing solution? If not, please clarify if these requirements are designed to be mutually exclusive, or if California JPIA is expecting that the reporting solution include multiple tools in order to meet both requirements. (NF-32/NF-33, Page A-5)**

**Response:** NF-32 and NF-33 are not mutually exclusive. A bidder proposing SQL Reporting Services would get points for satisfying both requirements. Bidders should propose whatever reporting tools they feel are best suited to accomplishing the goals of the project and describe why they are proposed.

- 19) **Does California JPIA have any requirement that development work must be done onsite?**

**Response:** There is no requirement that development work be done onsite. Onsite meetings will be required from time-to-time. Each vendor, regardless of on-site or off-site development plans, should describe in their proposal how they will assure that the development effort includes clear and ongoing communication between California JPIA and the development team.

- 20) Given the limited information available about the LMS interface requirements, is California JPIA open to a cost proposal that does NOT contain cost estimates for the LMS interface, with the assumption that such costs would be determined when the LMS requirements are better defined? (3.5.6 Learning Management System, page 24)**

**Response:** California JPIA is not open to proposals that do not contain cost estimates for the LMS interface. Please see the answer to question 8 for more information on this subject.