



November 9, 2017

The following (Revised Appendix Z and Calendar) will serve as Amendment #2 to NYSIF's Request for Proposals (RFP) for Customer Relationship Management (CRM) System, bid number 2017-87-ADM. Material in this Amendment supersedes any contradictory material in the RFP.

- RFP Section 4.B.Security.2.b. is hereby deleted and replaced with the following:
  - “Is hosted on dedicated servers (preferably located in the USA); no-shared-tenancy (NYSIF's data cannot be commingled with other entities. Other entities must not be able to access NYSIF data).”
- RFP Section 4.D. “Cost/Invoicing” is hereby modified to read as follows:
  - “The bidder must complete the Appendix Z Fee Schedule in its entirety with their proposal. Prices set forth shall be the total amount that the State shall be obligated to pay the bidder, should they be awarded a contract.

Prices bid shall be “all inclusive”. All prices shall include all direct and indirect costs, including, but not limited to, direct labor costs, overhead, fee or profit, clerical support, equipment, materials, supplies, managerial (administrative) support, system maintenance, system trouble shooting and modifications, all documents, reports, forms, reproduction, travel and any other costs.”

- RFP Section 4.F. “Location and Travel” is hereby modified to read as follows:
  - “Travel time and travel expenses are NOT separately reimbursable under this contract, see Appendix Z.”
- Appendix Z, is hereby revised and included in this Amendment.

Please note that the due date for the submission of bids **has changed**, see the revised RFP Calendar attached to this Amendment.

**All bids are due 12/11/17, by 2:00 p.m.(eastern).**

Sincerely,

Alexandria Romano  
Contract Management Specialist

## **RFP CALENDAR**

<b>DATE</b>	<b>EVENT</b>	<b>COMMENTS</b>
10/23/17	RFP Issued	
11/20/17	Final date for Bidder inquiries	<b><u>Written inquiries only</u></b> by 12:00 p.m. to: Email: <a href="mailto:contracts@nysif.com">contracts@nysif.com</a> Fax: 518-437-4209
11/30/17	Responses to Inquiries	Written responses will be posted on NYSIF's website at: <a href="http://www.nysif.com/procurement">www.nysif.com/procurement</a>
<b>12/11/17</b>	Final date for submission of bids	Deadline for response to this RFP. All sealed bids <b>MUST</b> be addressed to: Mail: NYSIF – Procurement Unit Bid # 2017-87-ADM 15 Computer Drive West Albany, NY 12205-1690 and received by 2:00 p.m.
TBD	Anticipated Start Date	Subject to the required approvals.

# APPENDIX Z

## CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SERVICES

### FEE SCHEDULE PROPOSAL

Bidder _____ DBA, if any _____ Federal ID # _____ Type of Firm _____ Address _____ _____	Contact _____ Title _____ Email Address _____ Telephone # _____ Fax # _____ Web Address _____
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Implementation fees must include, but are not limited to, any costs associated with software, system set-up, integration, and conversion fees. Cloud hosting fees must include, but are not limited to, any costs associated with hosting services such as server fees, user licenses (100 internal users, 200 external users, 100 end users, 2,500 read only internal users, 20 developer licenses), maintenance, and support. Cloud hosting services will begin once implementation has completed, per NYSIF's approval.

The anticipated number of users is provided below. Pricing must include all services identified in the Technical Specifications section of the RFP, Section 4.B.

**1. One-Time Implementation Fee** \$ \_\_\_\_\_

**\*Please provide a chart detailing specific milestones and milestone fees associated with this One-Time Implementation Fee. Invoices can be billed upon completion of milestones. All milestones and invoices associated with milestones are subject to NYSIF review prior to payment.\***

**2. Training** \$ \_\_\_\_\_  
(20 Developers and 100 End-Users)

**3. Years 1-3 Cloud Hosting Fees** \$ \_\_\_\_\_

**4. Year 4 Cloud Hosting Fees** \$ \_\_\_\_\_

**5. Year 5 Cloud Hosting Fees** \$ \_\_\_\_\_

**6. Data Storage (1 GB/Annually) \$ \_\_\_\_\_ X 5 years = \$ \_\_\_\_\_**  
(The number of GB's provided are strictly for evaluation purposes only. No amount of work is guaranteed)

**7. Redundant Network Access Across 2 sites for 5 years** \$ \_\_\_\_\_

**Total 5 Year Cost** \$ \_\_\_\_\_

## APPENDIX Z

### CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SERVICES FEE SCHEDULE PROPOSAL

**Hourly Rates for Consulting Services:** When evaluating costs, NYSIF will categorize proposed titles into the categories below. If multiple rates are offered within the same consulting role, the highest rates will be used for evaluation purposes. All hourly rates for EACH Consulting Role must be filled out. Failure to fully complete Appendix Z in the format provide may result in your bid being deemed non-responsive and disqualified. The number of hours provided are strictly for evaluation purposes only. No amount of work is guaranteed.

Consulting Role or Equivalent	Hourly Rate	Estimated Hours	Total Cost (Hourly Rates X Estimated Hours)
Consultant		100	
Data modeler		50	
Data architect		50	
Integration specialist or architect		100	
Senior consultant		50	
Business process analyst or specialist		50	
Quality assurance specialist		50	
Project manager		50	
Consulting Role Totals			\$

Bid prices shall be “all inclusive”. All prices shall include all direct and indirect costs, including, but not limited to, direct labor costs, overhead, fee or profit, clerical support, equipment, materials, supplies, managerial (administrative) support, system maintenance, system trouble shooting and modifications, all documents, reports, forms, reproduction, travel and any other costs.

**Failure to complete Appendix Z in the format provided may result in your bid being deemed non-responsive and disqualified. Payment structure and pricing including number of users will be subject to successful contract negotiations.**

**All invoices are subject to NYSIF review prior to payment.**

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Typed Name: \_\_\_\_\_ Date: \_\_\_\_\_