



ADDENDUM NO.: 1
INVITATION TO NEGOTIATE NO.: 19-0004
STRATEGIC WORKFORCE PLANNING
03/26/2019

The purpose of this addendum is to advise of any changes to the solicitation and answer questions received prior to the deadline in Section 1.9, Calendar of Events.

SOLICITATION CHANGES:

1. Amend Section 1.9 of the ITN by replacing it in its entirety with the following (the revised language is **blue, bolded**)

1.9 CALENDAR OF EVENTS: Listed below are important events and dates relevant to this ITN. These events and dates are subject to change at Citizens' sole discretion. It is each Vendor's responsibility to comply with these timeframes and to monitor Citizens' website for any changes.

| CALENDAR OF EVENTS | | |
|---|---|--|
| DATE: | TIME: | ACTIONS: |
| February 13, 2019 | | ITN Released |
| February 26, 2019 | 11:00 AM ET | Pre-Bid Conference (Not Mandatory) |
| March 6, 2019 | 2:00 PM ET | Questions Due |
| March 26, 2019 | | Answers Posted |
| April 9, 2019 | 2:00 PM ET | Replies Due |
| May 30, 2019 | 2:30 PM ET 11:00 AM ET | Evaluation Committee Public Meeting to Rank the Replies and which Vendors Proceed to Negotiations. |
| May 31 – July 12, July 3, 2019 | | Vendor Negotiations |
| July 16, 2019 July 11, 2019 | 11:00 AM ET | Negotiation Team Public Meeting to Announce Intent to Award Contract(s) |

2. This Invitation to Negotiate is amended to recognize an additional method of submission. The following sections are amended accordingly: REPLY CHECKLIST (Mandatory Documents and Materials), Section 3.5 REPLY FORMAT (subsections A and B), and Section 3.6 REPLY CONTENTS. The revised language is **blue, bolded**.

| The following checklist identifies the mandatory documents that must be included in a Reply. Failure to complete and provide any of these mandatory documents shall result in disqualification of the Vendor (as non-responsive). | | |
|---|--|---------------|
| | MANDATORY DOCUMENTS | SECTION |
| <input type="checkbox"/> | One (1) electronic version of the Reply on a compact disk (CD) or USB removable media (i.e., flash drive) ; | 3.5. A. |
| <input type="checkbox"/> | One (1) redacted copy of Reply on CD or USB (required only if Vendor considers portions of its Reply confidential or exempt from disclosure under Florida's Public Records Law) | 3.5. B. |
| <input type="checkbox"/> | Attachment D, Minimum Requirements Acknowledgement Form | 3.6, Folder 2 |
| <input type="checkbox"/> | Attachment E, Responsible Vendor Review Form | |
| <input type="checkbox"/> | Attachment F, Vendor Conflict of Interest Disclosure Form | |
| <input type="checkbox"/> | Financial Documents (as requested in Attachment G) | |
| <input type="checkbox"/> | Attachment H, Vendor Questionnaire | 3.6, Folder 3 |
| <input type="checkbox"/> | Attachment I, Price Sheet | 3.6, Folder 4 |

3.5 REPLY FORMAT:

- A. Original ~~Electronic CD~~ Reply: Vendor **shall submit** with their Reply one (1) ~~CD~~ original of their entire Reply, **either on CD or USB removable media (i.e., flash drive)**.
- B. Redacted Copy of Reply: In addition to the CD **or USB removable media** required in Section A. above, Vendor should submit an additional CD **or USB removable media** with their Reply containing a full "Redacted" electronic version of their Reply in accordance with Section 3.3, above. This CD **or USB removable media** should be labeled "**Redacted Reply**" and be void of any information Vendor deems exempt from Florida's Public Records Laws. Along with the Redacted Reply, submit a redaction log providing a legal justification for each redaction (e.g. Trade Secret Protection).

3.6 REPLY CONTENTS: ...The Reply should be organized as follows:

- The CD **or USB removable media** should have separate folders for each Reply "Folder."

ANSWERS TO QUESTIONS:

1. **Question:** Does the vendor need to identify and define the "talent, skills, and capabilities required to balance the supply and demand of key talent over time" or is the scope limited to designing and implementing an approach based on State provided talent requirements? *[ITN Section 2.1, Page 9]*

Answer: This question addresses two sections of the ITN. Section 2.1 describes the background for this ITN and includes a statement "With this ITN, Citizens desires to deepen its strategic workforce planning approach to ensure it has the necessary talent, skills, and capabilities to balance the supply and demand of key talent over time." Section 2.3, sets forth the services Citizens is requesting from vendors to help achieve this goal. In the course of providing the initial workforce planning evaluation described in Section 2.3(A), the vendor may need to help Citizens identify and define the items described in the question.

2. **Question:** Can you provide a "not to exceed budget" or an estimate of the person hours required of the vendor for the project?

Answer: Citizens does not have a "not to exceed" budget or estimated hours for this project. For planning purposes, Citizens tentatively budgeted \$75,000 for these services in its 2019 budget, but Citizens would prefer to pursue a more cost-effective approach if possible.

3. **Question:** Has anyone involved in vendor selection been discussing workforce planning services with any prospective respondents on this ITN? If so, could you identify the vendors and discussion issues? *[ITN Section 2.1, Page 9]*

Answer: Yes, Citizens conducted market research before issuing this ITN and discussed workforce planning services with several prospective respondents. The companies included CliftonLarsonAllen, Ernst & Young, Gartner, HRO Today Advisory Services, Mercer, and Plante & Morgan. Citizens requested quotes from three firms (Gartner, HRO, and Mercer). The quotes exceeded \$35,000, resulting in Citizens issuing this ITN or competitive solicitation. Citizens is encouraging all qualified vendors to compete for the business.

4. **Question:** What precipitated this request for services? In other words, are there some specific workforce planning issues or challenges that are being faced by Citizens? *[ITN Section 2.1, Page 9]*

Answer: Citizens is not facing any special planning issues or challenges that other companies of its size and nature are faced with. This initiative is intended to improve the alignment of workforce planning with business strategy, balancing the supply and demand of critical roles, competencies, and talent across the organization. Citizens desires a process to ensure the right talent is in the right place to drive the right results for the organization, with the necessary talent skills and capabilities to achieve our short and long term strategic objectives.

5. **Question:** Could you briefly describe what information constitutes "capacity assessment" as mentioned in Section 2.1 of the ITN? *[ITN Section 2.1, Page 9]*

Answer: Capacity assessment as used in section 2.1 of the ITN refers to budgeting and aligning of the required headcount with current and future workload.

6. **Question:** Is there any page limit on the technical response to the ITN? *[ITN Section 3.5, Page 12]*

Answer: No, the only response with a page limit is found in Attachment H, Section 1, Question 1 (Company Overview). The response to that question is limited to 2 pages. However, all Vendor answers should be thorough but succinct.

7. **Question:** Can you describe the capabilities and capacity of the Citizens staff who will be assigned to this project as part of the knowledge transfer?

Answer: The number of Citizens' staff is to be determined. This will be a collaboration of subject matter experts with IT, Human Resources, and Strategy and Planning.

8. **Question:** How was Information Technology selected as the initial group to go through the workforce planning exercise?

Answer: Information Technology was selected as the initial group to undergo the workforce planning exercise based upon current system needs, the difficulty in attracting and retaining this highly skilled talent segment, as well as a change in IT strategy (Cloud).

9. **Question:** Will the Citizen's project team include key stakeholders from the Information Technology division?

Answer: Yes.

10. **Question:** Will Citizens assign a Project Manager to work directly with the vendor on this initiative?

Answer: Yes.

11. **Question:** Is Citizens currently partnering with any external vendors on related human resources projects? Is there any expectation that this project will integrate with those projects?

Answer: Citizens' Human Resources Department utilizes external vendors; however, this project is not anticipated to integrate with any external projects or initiatives.

12. **Question:** Whether companies from Outside USA can apply for this? (like, from India or Canada)

Answer: Yes, however, written permission by Citizens contract manager, which may or may not be granted, is required for Services to be performed outside of the United States. As stated in the draft contract, Section 15.7, "Except as permitted in writing by Citizens' Contract Manager or designee, Vendor and Vendor Staff are prohibited from: (a) performing any Services outside of the United States; or, (b) sending, transmitting, or accessing any Citizens Confidential Information outside of the United States."

13. **Question:** Whether we need to come over there for meetings?

Answer: If this question pertains to public meetings related to the ITN, as described in section 1.10 of the ITN document, no. These meetings will be conducted telephonically. However, Vendors advancing to the negotiations phase may be requested to attend one in-person meeting/presentation. Furthermore, the Vendor selected to perform the services may be required to attend occasional in-person meetings during the term of the contract.

14. **Question:** Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

Answer: Refer to question #12 with regard to offshore/ on shore issues.

15. **Question:** Can we submit the proposals via email?

Answer: No. Per Sections 3.4 and 3.5 of the ITN and Addendum 1, Replies must be submitted to the physical address on the cover of the ITN and must be on an Original CD or flash/USB drive as well as a Redacted Copy (as applicable) on a separate CD or flash/USB drive. Paper copies are not requested.

16. Question: Does Citizens anticipate the Initial Workforce Planning Evaluation activities will primarily take place in Jacksonville? [2.3 Description of Services, A. Initial Workforce Planning Evaluation]

Answer: Yes, when onsite work is required during the initial workforce planning evaluation, the activities will primarily take place in Jacksonville, Florida.

17. Question: How many staff does Citizens anticipate will take part in the training and knowledge transfer activities? [2.3 Description of Services, A. Initial Workforce Planning Evaluation]

Answer: Refer to the answer to question 7 above.

18. Question: Would Citizens accept Reply submitted on a USB drive instead of a CD? [ITN Section 3.5 Reply Format, Page 12]

Answer: Yes, Citizens will accept Replies submitted on CD, as well as flash/USB drive, in response to this Invitation to Negotiate. See Solicitation Changes above.

19. Question: Can Citizens provide organizational chart or structure for the overall IT function so it is able to see where these teams fit in comparison to other functions (e.g. IT PMO, IT security, IT procurement etc.) [Exhibit 1]

Answer: Yes, see new Exhibit 2: Systems & Operations Functional Organizational Chart.

20. Question: Can Citizens provide Position or Job descriptions for the roles described in Exhibit 1? Do these reflect the work that is currently being performed? [Exhibit 1]

Answer: Yes, see new Exhibit 3: Architect Position Description which provides a sample position description. Additional position descriptions, as applicable, can be provided during negotiations or to the awarded vendor upon showing of a strategic need correlating to this ITN.

21. Question: What proportion of the roles described in Exhibit 1 are filled by FTEs versus contractors / contingent workers? [Exhibit 1]

Answer: All positions identified in Exhibit 1 are FTEs, with the exception of ten (10) positions identified as 'contingent workers' in IT Operations (7 Operations Technicians and 3 Technical Support Technicians).

22. Question: Are there other roles embedded in Business Units supporting line of business applications or break fix support (i.e. "shadow IT")? [Exhibit 1]

Answer: Yes, Business Analysts and Systems Analysts to troubleshoot issues. Additional roles fall into our Tier 2 and 3 support.

23. Question: What is the balance between in-house provided IT services and those provided by 3rd parties? Is this balance part of the scope of the strategic workforce assessment?

Answer: The balance of 80% of the work will be done mainly by the in-house staff in Exhibit 1 and 20% will be provided by 3rd parties.

24. Question: Are there any methodologies / frameworks being used within the IT Organization (e.g. ITIL, TOGAF)?

Answer: The frameworks we use in IT are SAFe 4.0, ITIL 3.0, and TOGAF.

25. Question: Does Citizens have a catalog of applications being supported by the these teams? Can this be provided?

Answer: Yes, Citizens IT does have a Catalog of Applications. It can be provided upon showing of a strategic need correlating to this ITN.

FAILURE TO FILE A PROTEST WITHIN THE TIME PRESCRIBED IN SECTION 627.351 (6)(e), F.S., CONSTITUTES A WAIVER OF PROCEEDINGS. SEE SECTION 4, GENERAL CONDITIONS, WITHIN THE SOLICITATION DOCUMENT FOR DETAILS REGARDING HOW AND WHERE TO FILE A PROTEST.