



**City of Tacoma**  
**Department of Public Utilities - Tacoma Power**  
**Workplace Giving Automation**  
**RFP Specification No. PI19-0186F**

**QUESTIONS and ANSWERS**

All interested parties had the opportunity to submit questions in writing by email to Seth Hartz by October 1, 2019. The answers to the questions received are provided below and posted to the City's website at [www.TacomaPurchasing.org](http://www.TacomaPurchasing.org): Navigate to *Current Contracting Opportunities / Services*, and then click *Questions and Answers* for this Specification. This information IS NOT considered an addendum. Respondents should consider this information when submitting their

**Question 1: There is a mandatory requirement listed in the technical requirements that our company cannot meet. We strive to adhere to the WCAG 2.0 Web Content Accessibility guidelines. Should we still submit a proposal?**

**Answer 1:** To keep a level playing field amongst all participants, evaluation of submittals and exceptions to terms are not made in advance. Software, including SaaS sites, for the City of Tacoma must follow Section 508 of the Rehabilitation Act of 1973 and Web Content Accessibility Guidelines (WCAG) 2.1. All sites will be tested and validated.

**Question 2: Based on some of the security related items requested with this RFP, would the City of Tacoma be willing to sign a mutual nondisclosure agreement prior to the submission of the RFP?**

**Answer 2:** No, a mutual non-disclosure agreement will not be signed. See Section 3.02.3 regarding confidential information.

**Question 3: YourCause's pricing structure is best conveyed through our standard pricing template. Are we able to provide our template in addition to the template provided via mail, or email to the designated RFP contact?**

**Answer 3:** Yes, supporting detail can be submitted in addition to the Price Proposal Form. Reference Section 3.01.1 for total number of pages that may be submitted.

**Question 4: "Provide the electronic copy as a single file rather than multiple individual documents."**

To clarify, do you want all of the following in a single PDF formatted file?

- 1 Title Page
- 2 Table of Contents
- 3 Index of Confidential Information
- 4 A – Signature Page
- 4 B – Prime Contractor's Pre-Work Form
- 5 Balance of Information

**Answer 4:** Yes.

**Question 5: Pricing - 1.06.6 Contractor shall extend the same services at City prices to participating public agencies in accordance with the Interlocal Agreement.**

**Does this mean that you want employees of the public agencies participating in the City's programs? Would these employees within other agencies have the same user experience as a TPU employee?**

**If so, are the individuals within your "participating public agencies" included in the 800-employee count provided?**

**If not, how many additional users will be required?**

**Answer 5:** This clause relates to the option for other public agencies to piggyback a City of Tacoma contract. The 800-employee count does not include other potential public agencies."

**Question 6: The amount budgeted for the initial two-year term is \$40,000 (this includes first year maintenance and licensing fees)."**  
**To clarify, is \$40,000 only for the first year? (i.e. another \$40K is budgeted for the second year's maintenance and licensing fees?)**

**Does this budget also account for processing fees from the vendor for both years? If not, what is your budget for payment processing for year one and two of the term?**

**How often do you disburse donations and/or matches to charities?**

**Do you have an estimate of how many unique charities you disburse to each disbursement cycle?**

**Answer 6:** The \$40,000 budget applies to first year license and maintenance fees along with implementation.

Second year maintenance fees: Will be determined during contract negotiation.

Payment Processing Fees: No. Payment processing fees will be addressed during contract negotiations.

Donation disbursement: Current disbursement happens once every two weeks.

Estimated number of unique charities that will be involved: Unknown.

**Question 7: Background and Overview**  
**Can you tell us more about your giving program?**

**Can employees make credit card donations year-round?**

**Can employees make/edit payroll donations year/round?**

**Can employees make/edit offline donations year/round?**

**Do you support an annual workplace giving campaign (i.e. where employees can only make payroll donations during a designated timeframe and pledge for the next year**

**Answer 7:** Please reference section 2.01 for the overview and background.  
Credit card donations: Employees cannot currently make credit card contribution year round.

Edit Payroll donations: Possibly, but not on their own.

Offline donations are not a current requirement. Employees cannot currently make offline electronic contributions.

Annual campaigns: While there is an annual campaign during a designated timeframe; volunteer and donation events happen year round.

**Question 8: Scope of work**  
**Do you intend to bring in historical data for the following programs?**  
- Giving?  
- Volunteering?  
- Corporate Grants?  
**If so, how many years do you want to import?**

**Answer 8:** No. At this point in time there is no expectation that we will have to bring in historical information.

**Question 9: High Level Project Schedule**  
**To confirm, do you plan to launch the platform to employees in mid-February 2020?**

**Answer 9:** Yes, that is the intent. But the dates might change based on contract negotiations.

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**Question 10: Req\_001 - Can you please explain why you would want this data removed? Do you not want to track their previous participation in your program?**

**Answer 10:** The requirement is to have the ability to cancel the registration based on the licensing model. We don't want a license to be used by a former employee.

**Question 11: Req\_003 - Can you please clarify if the payroll user is an Administrator or HR team member, or any employee using payroll deductions?**

**Answer 11:** The intent of the requirement is to have someone from Payroll extract records and create a report containing the pledge details to be used to reconcile data.

**Question 12: Req\_004 - Can you please elaborate on this requirement?**

**Answer 12:** The requirement is to provide a wage type or a unique identifier that will be used to identify donations using the solution. The wage type is a configured field in the City's ERP (SAP).

**Question 13: Req\_008 - Will TPU allow employees to log volunteer hours with any nonprofit/501c or will there be exclusions?**

**Answer 13:** Yes. Employees can log their volunteer hours with any non-profit organization. However, all reported hours will be audited against a pre-approved list of non-profit organizations that the City partners with.

**Question 14: Req\_011 - Can you please elaborate on "incentive hours"? Is this a dollars-for-doers program or Volunteer Time Off program? Please provide eligibility guidelines.**

**Answer 14:** This requirement pertains to the Community Involvement Goal, which rewards employees for volunteering in the communities TPU serves. Employees must volunteer at least eight hours for a qualifying nonprofit in TPU's service territory. Volunteer time or product donations must be made to 501(c)(3) charitable nonprofit agencies that serve the poor and infirm.

**Question 15: Does TPU also offer an employee matching gift program? If yes, please provide eligibility guidelines.**

**Answer 15:** No. There is no matching gift program at TPU.

**Question 16: Req\_020 - How many users (i.e. reviewers, administrators) will need access to the grants management module?**

**Answer 16:** The total number of users that will need access to the Grants module will not exceed three.

**Question 17: Do you wish to manage the payment processing and disbursement of grants? Or would you prefer that your vendor manage this?**

**Answer 17:** The expectation is that the Solution provider will handle the payment processing and disbursement.

**Question 18: Req\_035 - Can you please clarify the relationship between adding 10 volunteers and the ability to add non-TPU individuals? Do 10 employees need to be registered to allow for guests?**

**Answer 18:** The requirement provides the ability to the administrator to add non-staff individuals, such as family and friends, to a volunteer event. For example, a volunteer event has 40 openings; TPU staff sign-up for 30 spots, leaving 10 openings for non-staff participants.

**Question 19: Req\_047 - Can you please clarify the use case for why TPU would like to retain historical data for retired employees but not for employees mentioned in the first requirement above (Req\_001)?**

**Answer 19:** Retired employees often continue to volunteer for events and the administrator wants to track this time. Req\_047 allows TPU to retain historical data for trending. Req\_001 relates to the removal of registered users by the administrator (see question 10).