RFP Questions

1. *What kinds of information and links are a priority for this portal to share?*
   - Calendar events, contact information, descriptions of key entrepreneurship resources and organizations at the local, county, regional, and state level – information to be shared is intended to mirror Provider (ESO) profiles.
2. *Is it also important to have accounts and profiles for mentors, investors, and other startup ecosystem participants?*
   - The specifics of what participants will be listed has not yet been determined. If resource organizations are listed in the portal they need to have contact and description information posted. The system should allow for a level of flexibility to accommodate expansion or contraction of resources listed.
3. *What kinds of integrations are you specifically seeking with a Provider's website?*
   - Preservation of Providers' existing brands and identities while providing information and access to entrepreneurs is the driving factor and we have not determined a specific form of integration. Integration could be addressed through a variety of means and should be included in the proposal.
4. *Are there specific CRM platforms that are a priority for the platform to integrate with?*
   - Salesforce is a priority, though flexibility and the ability to integrate with other CRMs would be of high value.
5. *Are you seeking a SaaS platform that will be accessed out-of-the-box or a SaaS platform that will be extended with customer development?*
   - An "out of the box" platform initially will work, however the ability to add features in the future if needed would be ideal.
6. *What specifically do you envision by "resources"? Programs? Mentors? Investors? Digital learning content? Perks? Or something else?*
   - Primarily organizations and programs, though a level of flexibility may be necessary to allow for additional content. Individuals, such as mentors, may be contacted through programs or organizations.
7. *Do you want a map function to show resources across all Providers, for a specific Provider, or both?*
   - A map is not a requirement but may add value. Primary consideration is defining Provider service area to limit display of resources for which a given entrepreneur is eligible.
8. *What precisely do you intend by "profile tagged with organizations contacted/referred and services rendered?"*
   - Association between businesses in the system and the orgs they have been referred to or from as well as potential resources delivered.
9. *Are there any requirements or suggestions about number of pages, fonts etc. for the proposal response?*
   - We ask to limit total proposal pages to under 15 pages with smallest font size of 11.

10. *From a technical standpoint, have you considered how third-party providers will integrate the platform? Do you have a preference among creating a custom iFrame, API, code snippet, or sub-domain?*
    o From a technical standpoint, we do not have a specific requirement on how 3rd parties will integrate or a custom preference.
11. *Are you expecting this to handle event registration? If so, have you discussed how you'll handle payment processing, guest lists, and refunds?*
    o Yes, we are interested in event registration. We do not require payment or refund processing, though the potential to link to or interface with third party payment systems may be considered.
12. *What types of user engagement are you looking to track?*
    o Unique businesses/entrepreneurs, services received, use of portal resources, progress of business development, business intent, level of peer to peer interaction, future needs assessment, site access numbers and time on site/platform at a minimum. Other metrics may be included and the potential to add additional metrics would be of value.

13. *Could you please give a bit more background on the statement below? Perhaps an example of a use case and the type of data you see being shared?*

    "i. Integrate with multiple external partner organizations' existing websites,

    brands, and processes"

    o We would like sections of the platform to be available to ESO' website like "events". Likewise, we want the ESOs to upload their events for other ESOs to share.

    o Preservation of Providers' existing brands and identities while providing information and access to entrepreneurs is the driving factor and we have not determined a specific form of integration. Integration could be addressed through a variety of means and should be included in the proposal.

14. *Can you give us a bit more information on which CRM you use and would the integration be a manual import/export as needed or do you want this to be real-time integrated? This is in reference to the line item below from the RFP: "Consumer profile downloadable into Provider CRM or for offline/manual engagement"*

    o Salesforce is a priority, though flexibility and the ability to integrate with other CRMs would be of high value. Manual vs real time preference depends on overall platform design and usability.

15. *Under the tracking statement below you reference a tool for program utilization. If we could configure specific tracking reports in a tool like Google Analytics would that serve your needs? How do you envision tracking program utilization and resource utilization?*

- The configuration of reports is likely less critical than the ability to access the data and customize information retrieval. The ability to program and save reports in some fashion would be of value.
- We envision tracking unique businesses/entrepreneurs, services received, use of portal resources, progress of business development, business intent, level of peer to peer interaction, future needs assessment, site access numbers and time on site/platform at a minimum. Other metrics may be included and the potential to add additional metrics would be of value.

16. *Scope Integration - Are you looking for one platform that includes regional landing pages, calendars and resource inventories or one platform with the ability to embed a customized regional version of the calendar and resource inventory on third party/partner sites? If the embed option, approximately how many partner websites?*

- One platform with the ability to embed a customized regional version with up 30 installs initially.

17. *Section IV - Project Completion - Please define execution of contract by June 1, 2019. Is that the date the project must be started, or project completed?*

- "execution of contract" is when the project should be *started*, not completed.

18. Section V. Cost Proposal - Is there a budget/up to amount for the initiative?

- The final budget will likely be determined based on review of responses and successful negotiation of terms.

19. Will you be providing a re-cap of responses to questions received from all interested parties?

- Yes.

20. There are references to "Providers" throughout the RFP which are designated under "Scope" I. to be "multiple entrepreneurship resource/support organizations." Would a group like IGNITE! Business Success in Fond du Lac County be considered a Provider in this project? Would individual Consumers be tied to a specific Provider or would there be any instance in which a Consumer would "belong to" multiple Providers?

- o Yes, IGNITE would be considered as an ESO. "Consumers"/entrepreneurs may belong to several ESOs.

21. Would there be gated content that would only be accessible to those who sign up as a Consumer versus general users who view the site without being logged in?

- o Yes, we would like that capability.

22. Is there a current information architecture for desired data points across accounts for Consumers and Providers? We see under "Requirements" IV. a. iii. the note for "Configure for Provider target audience" but is there additional/specific fields beyond the listed items as sub-point a. or is that yet to be determined? Do you know of any similar systems or software that are close to what you're looking for to help illustrate some of the structure and architecture that's outlined in the RFP?

- o The data fields have been preliminarily outlined and generally consist of standard contact information and various common attributes related to the Provider organizations and programs/resources available. The specific fields will be determined during the procurement/build/implementation process.
- o We do not have a specific system or software example.

23. Under the "Key Dates" section, there is approval listed for March 22, 2019 and then contract executed for June 1, 2019. This leaves only 10 weeks for discovery, design, UI/UX development, database engineering, Q/A, and launch. Am I reading it correctly that "Contract executed" means that this software would then launch on that that date? If so, is there any opportunity for a more robust development cycle and further deadline? With similar project scope, our experience is an average timeline of six months from discovery to launch. If I'm mistaken on the definition of "Contract executed" could you share what you're looking for as a launch date?

- o Once a provider is chosen, the WEDC internal process for contract "execution" meaning review and approval of the contract will have a target of June 1, 2019. Development and implementation will likely extend beyond the initial contract date and the proposed timeline for that work is a component of the RFP.

24. Under "Requirements" IV. a. iii. the RFP notes, "Integrate with multiple external partner organizations' existing websites, brands, and processes." Could you further define what is meant by "Integrate" beyond the two sub-points that are there now? Is it something where they just need to have a link to the website and a subsequent link back to the software, or is it more involved than that with a need for data to be sent back and forth? If it's a more robust data-link, could you share some examples of the vision for a user interacting between the two environments and what data is reflected across both?

- We are looking for a "more-robust" data share of information, however, we have not excluded accomplishing that goal via links if properly implemented.

- Preservation of Providers' existing brands and identities while providing information and access to entrepreneurs is the driving factor and we have not determined a specific form of integration. Integration could be addressed through a variety of means and should be included in the proposal.

25. Under "Requirements" IV. a. vi. & vii. there are references to an event calendar with some things that are "shared across network" and others "limited by Provider preferences." Could you give a bit more detail in terms of what might be limited or they'd have control over? Also, would the calendar integrate with established event registration platforms like EventBrite or would everything for event registration be handled within the software itself?

- We would like the ESOs to have the ability to share or display events selectively across the network depending on the intended constituency of the ESO or audience of the event. For example, providing event information for an Eau Claire-specific event may not make sense for an organization focused on central city Milwaukee. We are open to integrate with other platforms like EventBrite if the overarching goals can be met without undo constraints.

26. Under "Scope" I. the last bullet point calls for "Ability for third party to assume responsibility over daily platform administration." Would this be a third party separate from Providers as another account tier/level of access? Or would this be abilities and permissions at the Provider level?

- WEDC does not have the capability to handle administration of the system, a third party will be handling and need to have access that is above Provider (ESOs) level.

27. Page 2: "Assessment tool/analytics for program utilization."

a. What assessment tool/analytics does WEDC currently use and/or are hoping to use?

b. Please provide additional information of what you hope to get out of using this tool.

- o WEDC's current analytics are outside the scope of the RFP.
- o The assessment tool is intended to identify 1) platform utilization and 2) how entrepreneurs are moving through the support network and what resources are being accessed.

28. Page 2: "User accounts/profiles for entrepreneurs (Consumers) and multiple entrepreneurship resources/support organizations (Providers)."

a. Are these private accounts/profiles (with username and password)? If they are private, how many accounts/profiles?

- o Private accounts with Providers having ability to view those Consumer profiles that are "shared" with them or referred to them by other Providers. As for numbers, unsure for now, but a target of 10,000 would suffice.

29. Page 2: "Integrate with multiple external partner (Providers) organizations' existing websites, brands, and processes."

a. Specifically, who are the external partners this platform will integrate with?

b. What is meant by "integration?" (i.e. a link to another site, an API integration, etc.?)

- o ESOs/Providers will integrate with the system including the ability to import or access certain Consumer data into their own CRM for additional service delivery. For example, a provider would download the basic contact information and business profile summary, but financial information necessary to underwrite a loan will not be part of the platform and will need to be provided separately.

- o Preservation of Providers' existing brands and identities while providing information and access to entrepreneurs is the driving factor and we have not determined a specific form of integration. Integration could be addressed through a variety of means and should be included in the proposal.

30. Page 2: "Independently configurable for resource provider target consumer, geography, industry, etc."

a. What kind of independent configurations do each of these areas need?

b. Are there examples you can share?

c. Is this related to a search feature for each area?

- o We would like a "consumer" to be able to search for ESOs that provide the "services" that they are interested in and eligible for. ESOs may be restricted to or focused on counties, regions, industries, entrepreneur characteristics, or other features. Similarly, entrepreneurs may be interested primarily in financial assistance, various forms of technical assistance, real estate, networking, or other resources.

31. "Consumer profile downloadable into Provider CRM or for offline/manual engagement."

a. What CRM is this referring to?

b. What kind of format is required for compatibility?

- o Salesforce is a priority, though flexibility and the ability to integrate with other CRMs would be of high value.

32. Page 2: "Searchable/filterable events calendar shared across Provider portals."

a. Specifically, what Provider Portals?

b. Are these external sites or different areas within this platform?

- o Regional ESO's that participate in the platform, all external sites.

33. Page 2: "Events management and registration."

a. Does WEDC currently use a third-party events management and registration platform? If so, which platform?

b. Is WEDC open to using a third-party platform for events management and registration, provided the chosen vendor owns and maintains an event management platform that can be integrated with the platform within the scope of this RFP?

- o WEDC's current events management is outside the scope of this RFP.
- o The ESOs use different events systems, we are open to a 3rd party to maintain system, if the overarching goals can be met without undo constraints.

34. Page 2: "Ability for third-party to assume responsibility over daily platform administration such as resource listing, calendar functions, user access, user permissions, and related

activities."

a. Is WEDC referring to the chosen vendor as the third-party, or a separate

third-party?

> o Separate 3rd party.

35. Page 3: "Provider access to control display on their instance."

a. What kind of control is expected?

b. What kind of integration with existing websites, etc.?

> o Provider/ESO can choose how much data to share, from events to Consumer data with other Providers/ESOs.
> o Preservation of Providers' existing brands and identities while providing information and access to entrepreneurs is the driving factor and we have not determined a specific form of integration. Integration could be addressed through a variety of means and should be included in the proposal.

36. Page 3: "Configure for Provider target audience."

a. What kind of configuration is expected for each aspect listed?

b. Is this a search feature?"

> o Each Provider/ESOs has services and industries that they target, we want the ability for consumers to identify those services and industries they are most interested in. Search is a possibility, though filters or menus may also work.

37. Page 4: "Single calendar shared across network."

a. What mechanism is used for sharing?

b. Is this all within the system being requested, or is there a desire for integration

between external sites?

> o The mechanism for sharing has not been predetermined.
> o We prefer a single system on which events from individual Providers can be shared across the ESO network. We are open to external event or calendar systems if the overarching goals can be met without undo constraints.

38. Page 5: "The contract will cover 5 years with the option to renew for another 5 years."

a. Is the 5 year option to be quoted in the proposal?

   o No?

39. In a nutshell, what high-level problem is being solved by this solution?

   o Provide entrepreneurs a way to identify resources available to them.
   o Allow ESOs to share appropriate Consumer referrals and data.

40. Why is WEDC uniquely positioned to facilitate the development of this platform?

   o WEDC is the lead economic development organization for the State of Wisconsin.

41. What is the key benefit desired for each of the following?

- Entrepreneurs –
  o Identify resources available to them
- Provider Organizations –
  o Share appropriate referrals and information with other ESOs and to strengthen the network of entrepreneurship resources in the state.
- Startups –
  o Same as entrepreneurs for our definition
- The State of Wisconsin –
  o increase efficiency of our ESOs along with data to measure entrepreneurial activity within the state.

42. What factors went into the solution requirements?

   o A committee of ESOs shared their most important needs

43. Who is the primary user?

   o Entrepreneurs and Providers (ESOs)

44. Who is the primary customer?

   o Providers (ESOs) and entrepreneurs

45. Who owns what data?

   o Providers "own the data" captured by their individual system or CRM. Information that is "shared" across the network or otherwise accessible to the WEDC is owned by the WEDC.

46. Other than the mention of "Ability for third party to assume responsibility over daily platform administration such as resource listing, calendar functions, user access, user permissions and related activities," the RFP does not make mention of the day to day management of the platform and initiative.

- Is that assumed to be WEDC?
- Will there be a different platform manager?
- Would it be acceptable to include management and strategy as well as a recommendation for a specific third-party manager?
  - The 3rd party will be responsible for the day to day activities. Yes, you can include recommendations, however the selection on a platform manager is outside the scope of this RFP.

47. "… integrate with multiple external partner org's existing websites, brands and processes" and Independently configurable for resource provider target consumer"

- Can you explain what you mean by this? Is this allowing these orgs to white label the site to their own palette and imagery, or consume resources published from this portal?
  - White label is a possible solution, however the implementation must be low-barrier given the resource constraints of many ESOs.
- Is the intent for this to be a single-source platform or regional syndication? Would an end user be required to interact through an organization's "portal," or would there be generic/network-level content and/or interaction?
  - There is no specific predetermined solution.
- What types of orgs are these? Agencies? Non-profit, For-profit service providers?
  - Predominantly nonprofits, units of government, educational institutions, and similar economic development actors.
- Who determines which providers are allowed and in what capacity?
  - Committee of ESOs or as determined by WEDC.
- What overlap, either geographical or service-based, need to be accounted for?
  - ESOs may be restricted to or focused on counties, regions, industries, entrepreneur characteristics, or other features. Similarly, entrepreneurs may be interested primarily in financial assistance, various forms of technical assistance, real estate, networking, or other resources. The specific fields will be determined during the procurement/build/implementation process.
- Other than Salesforce, what other CRMs are popular among target providers?

  - Salesforce is a priority, though flexibility and the ability to integrate with other CRMs would be of high value.
- Do Providers have visibility to data that general users do not?
  - Yes, Providers will have access to information Consumers may not have
- Do Providers need to have visibility to any specific data regarding other Providers?

o Yes, those shared by other providers

48. "Ability for Providers to refer individual Consumers to other Providers in the network and "tag" Consumer profile with resources provided or requested."

- What is the goal of this? Would you expound a bit? Is this for a Provider's own use or for the benefit of other Providers? Or it is for network/WEDC use?
    - o To allow easy handoff of Consumers between ESOs. We have many entrepreneurs that use or "graduate" from other ESOs. The ability to have knowledge and information already on a consumer greatly reduces intake process.

49. "Ability for third party to assume responsibility over daily platform administration such as resource listing, calendar functions, user access, user permissions, and related activities."

- Is that 3rd party assumed to be WEDC or can the proposal include the inclusion of a recommended third party such as a university?
    - o WEDC does not have the capability to handle administration of the system and a 3rd party will be responsible for the day to day activities. Yes, you can include recommendations, however the selection on a platform manager is outside the scope of this RFP.
- If WEDC is the manager, what open records compliance would be necessary?
    - o While WEDC will not be the 3rd party administration, data entered and determined to be "owned" by WEDC will have open records compliance.

50. Provider access … just a login to manage?

    - o Yes.

51. Configure … what is the end goal with this? Customizing the view of what they display? Visibility of content they publish based on the viewer's profile? Tagging themselves to be discoverable in searches?

    - o Allow the ESOs to choose what sections of the platform they want to utilize on their own sites and what they want to share.

52. Default eligibility … what does the user need to be eligible for? Viewing content? Receiving services? Something else? How is eligibility determined?

    - o For the Consumer, filling out a limited profile would provide default view of ESOs and those services and events for which the Consumer is eligible. For example, information for an Eau Claire-specific program may not have value for an entrepreneur in Milwaukee.

- 53. What profile data needs to be downloadable?
    - It is anticipated that Consumer name, contact information, business/industry type, and ESOs previously engaged with at minimum. The specific fields will be determined during the procurement/build/implementation process.

54. What are the target system requirements – vCard? Csv?

- The target format has not been identified in advance.

55. Who owns the data in the consumer profile?

- Data is "owned" by the ESOs that collected it, once it is shared it belongs to the platform/WEDC.

56. Which party is responsible for data security compliance with PII?

- The platform should include required consent, disclosure, and security features to provide for PII compliance if it is determined that PII collection is necessary and cannot be eliminated. In general, sensitive information should not be shared on the system and would be collected by ESOs as necessary through their existing systems.

57. Can one provider download the user profile data that was added (like a tag) by other providers?

- Yes, data shared by other providers can be downloaded.

58. Resource Catalog: Default display … what are the required parameters of the preferences to be applied?

- We would like a "consumer" to be able to identify the ESOs that provide the "services" they are interested in and eligible for. ESOs may be restricted to or focused on counties, regions, industries, entrepreneur characteristics, or other features. Similarly, entrepreneurs may be interested primarily in financial assistance, various forms of technical assistance, real estate, networking, or other resources. The specific fields will be determined during the procurement/build/implementation process.

59. Assessment of program utilization: Can you give an example of a point of engagement to track?

- o Consumer completed "coaching" program with ESO "A" and now is participating in ESO "B" accelerator program.
- o

60. If referrals are tracked … how do you envision that a referral would be made within the system and by whom? What real-world action are we drawing a parallel from for this?

- o Referrals will be made by ESO providers to other ESO providers. Real world application is that these types of referrals are done with calls and emails, now they can be done with consumers profile/history already collected.

61. Resource utilization … are an org's internal resources and their use to be performed or tracked somewhere in the solution? Or is this more referring to content that an org publishes?

- o The referring ESO can indicate what resources have been utilized by the Consumer.

62. Documents (w9 and contract): These documents are to be provided with the proposal or at some future point? For, example at a point of interview or consideration.

- o We would prefer at the time of proposal.

63. How would the contract handle enhancements and product management (variable costs) versus simply maintenance (relatively fixed costs)? Should that be rolled into the proposal?

- o The anticipated management expenses (variable and fixed, if any) should be included in the proposal.

64. "Ongoing annual access/service price" – Does this imply that the members of the network are paying to use the platform or that the solution proposed may have built in costs to be factored in?

- o This section pertains to the service providers applying to build the software. We need to know if there are fees in accessing the system.

65. Appears to be a one-time procurement, but the relationship is for 5-10 years. Can you speak to the nature of the work after the initial build?

- In general, the RFP contemplates the potential for either an initial procurement or "setup fee" with ongoing subscription, hosting, or maintenance costs. The specifics will be determined per proposal and should be included in the response.