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# **Request for Information**

**RFI# 21-080**

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## **Economic and Social Services Knowledge Management System**



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Wake County, North Carolina  
Procurement Services  
301 S. McDowell Street  
Raleigh, North Carolina 27602

Responses are due October 28, 2021  
before 3:00PM Eastern.

# Table of Contents

<b>1.0 Introduction .....</b>	<b>1</b>
1.1 INTRODUCTION.....	1
1.2 PROJECT SCOPE.....	1
1.3 GENERAL RESPONSE REQUIREMENTS.....	3
<b>2.0 General Response Requirements .....</b>	<b>4</b>
2.1 RESPONSE CONTACT.....	4
2.2 RESPONSE SUBMITTAL REQUIREMENTS .....	4
2.3 RESPONDER EXPENSES .....	5
2.4 INTERPRETATIONS, DISCREPANCIES, AND OMISSIONS .....	5
2.5 SCHEDULE .....	5
2.6 NON-DISCLOSURE OF COUNTY INFORMATION .....	5
2.7 RETENTION OF RESPONDER MATERIAL .....	6
2.8 CONFIDENTIAL INFORMATION/PUBLIC RECORDS LAW .....	6
<b>3.0 Detailed Submittal Requirements .....</b>	<b>7</b>
3.1 RESPONSE FORMAT .....	7
3.2 EXECUTIVE SUMMARY .....	7
3.3 COMPANY BACKGROUND .....	7
3.4 SCOPE OF SERVICES OFFERED .....	8

# 1.0 Introduction

## 1.1 Introduction

Wake County Government is issuing this Request for Information (RFI) to assist in determining the feasibility and estimated budget projections for a comprehensive Knowledge Management System (KMS). This is an information gathering process to which a Request for Proposals (RFP) may be issued later with detailed requirements and instructions. Submitting a response or not submitting a response to this RFI will not dictate your involvement in any future RFP. However, this RFI is your opportunity to present the services and functionality from your firm and product.

Wake County Government is in Raleigh, North Carolina. We serve a population of over one million. Our Economic and Social Services (ESS) Division is part of Wake County Health and Human Services with over 900 staff and serving more than 20,000 Children and Families annually. Program and Staff Development (PSD) within ESS is responsible for training, quality assurance, policy guidance, hearing and appeals coordination, technical support, security, onboarding, and managing special projects for all staff within the division. Wake County PSD is looking for a Knowledge Management System that will provide a diverse amount of online learning resources to all employees within Economic Services.

Please note this process is designed solely to inquire about potential costs and services that are available and may not result in any further actions in any manner.

## 1.2 Project Scope

Wake County Program and Staff Development is looking to establish a KMS which will be a centralized knowledge and learning repository for all end users and comply with our current technological enterprise standards and integrate well with our current enterprise systems.

Specifically, PSD is looking for an end-to-end solution that will provide:

- A teaching and learning platform used to share and store information
- A platform used to centralize and manage knowledge and information
- A learning repository for end users to quickly access information
- Workflows (Routing, Notifications, Escalations, Ticketing, Alerts)
- Integration with other Health and Human Service systems
- Communications (email notifications, chat, electronic, paper, API with other systems)
- Cloud space that will accommodate large file content (videos, webinars, recordings) and other various forms of content
- Security that meets federal, state and local compliance (e.g. HIPAA, FERPA, 42CFR, NCGS122C)
- Single Sign-On capabilities (e.g. SAML, LDAP)
- Reporting
- Dashboards, key performance indicators, individual staff dashboards, and To-Do lists
- Ease of use, ability to be customize learning materials and reorganize as needed to meet the needs of several divisions within the organization.
- Compatible with Microsoft operating system environment preferred

To assist responders with the development of their proposal, the appendices attached have been created: **Appendix A Technical Requirements**

### **1.3 General Response Requirements**

When responding to this RFI, please follow all instructions carefully. Please submit responses according to the outline specified and submit all hard copy and electronic documents according to the instructions. By virtue of submitting a response, interested parties are acknowledging:

- 1.4.1 Responses shall be for informational and budgetary purposes, and for the evaluation of this request.
- 1.4.2 Responses will be received by Wake County Government at the time and place so stated in this document. At that point, Wake County will close the receipt of responses and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process.

Wake County, solely at our option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Realizing the nature of a competitive environment and protecting the integrity of the process, respondents are not to contact any county staff or elected official in reference to the process. As information becomes available and is relevant for release, that information will be shared with respondents. Any and all information submitted in conjunction with this RFI and the evaluation process will not be returned to the respondent.

## **2.0 General Response Requirements**

### **2.1 Response Contact**

Responses should be directed to Procurement Services, specifically to the Purchasing Director, as outlined below. In regard to this RFI, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, or Board of Commissioner members during the period beginning with the issuance of this document through evaluation unless authorized by the response contact.

**Response Contact:**

Melissa England  
Wake County Finance Dept - Procurement Services  
[melissa.england@wakegov.com](mailto:melissa.england@wakegov.com)  
919-856-6327

### **2.2 Response Submittal Requirements**

In order to facilitate the analysis of responses to this RFI, responders are required to prepare their responses in accordance with the instructions outlined in this part and elsewhere in this RFI.

Three (3) hard copies and an electronic copy on USB flash drive (.docx, .xlsx and .pdf versions) must be submitted containing the entire contents of your response to the address shown below.

## RFI #21-080 Knowledge Management System

### **Mailing Address:**

Melissa England  
Wake County Finance Dept - Procurement Services  
Wake County Justice Center, 2nd Floor – Ste 2900  
301 S. McDowell Street  
Raleigh, NC 27601

The County must receive responses BEFORE 3:00 PM October 28, 2021. *The responder's name, RFI number, and response closing time and date must be marked clearly on the response submission.* The time of receipt shall be determined by the time clock in the Wake County Procurement Services office. Late responses will not be accepted. The County will not be held responsible for the failure of any mail or delivery service to deliver a response prior to the stated due date and time. It is solely the responder's responsibility to:

- (1) ascertain that they have all required and necessary information, documents and addenda, prior to submitting a response; (2) ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be reviewed.

### **2.3 Responder Expenses**

Please be sure your RFI response addresses any necessary travel and lodging expenses or any other expenses applicable to the development of this RFI. The County will not be responsible for any expenses incurred by any responder in the development of a response to this Request for Information or any other activities associated with this request that are not included in the response.

### **2.4 Interpretations, Discrepancies, and Omissions**

Should any proposer find discrepancies, omissions or ambiguities in this RFI, the responder must at once request in writing an interpretation from the response contact listed in Section 2.1. All questions submitted must be in writing.

The deadline for submitting questions is **September 30, 2021 by 5:00pm**. All questions will be answered to the extent possible in the form of addenda, issued by October 8, 2021, to the specifications and shared with known interested parties. All written requests for clarification should be addressed to the attention of Melissa England

Failure to request an interpretation will be considered evidence that the Responder understands the provision of the RFI.

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect.

### **2.5 Schedule**

Action	Applicable Dates
RFI Release	<b>September 22, 2021</b>
RFI Question Deadline	<b>September 30, 2021, 5:00 pm</b>
RFI Questions Answered (Addenda Issued)	<b>October 8, 2021</b>
<b>RFI Responses Due before 3pm</b>	<b>October 28, 2021</b>

## **2.6 Non-disclosure of County Information**

All data and information gathered by the responder and its agents, including this RFI and all reports, recommendations, specifications, and data shall be treated by the responder and its agents as confidential. The responder and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.

## **2.7 Retention of Responder Material**

The County reserves the right to retain all responses. No responses will be returned to responder.

## **2.8 Confidential Information/Public Records Law**

INFORMATION SUBMITTED IN RESPONSE TO REQUESTS FOR BIDS, PROPOSALS, AND OTHER PROCUREMENT METHODS SUBJECT TO PUBLIC RECORDS LAW

Wake County is subject to North Carolina's Public Records Act located in Chapter 132 of the North Carolina General Statutes. As a result, information submitted to and received by Wake County in response to a Request for Proposal/Request For Bid/Request For Quote/Request for Qualifications, or any other procurement method (collectively "Procurement Process"), is considered public record and may be released for public inspection after the contract award, or as otherwise permitted under NCGS § 143, without further notice to the proposer. The County does not intend to elicit confidential or trade secret information in response to a Procurement Process and assumes no responsibility for the submission of such information. Wake County reserves the right to share any information submitted in response to a Procurement Process with any person(s) or firm(s) involved in the review and evaluation phase of the Procurement Process.

### **CONFIDENTIAL OR TRADE SECRET INFORMATION**

If a proposer nonetheless submits information in a bid proposal or other response to a Procurement Process and it considers such information to be confidential, then all four requirements of [NCGS 132-1.2](#) "Confidential Information" must be met for the County to consider withholding the information from public inspection in response to a public records request. **Among other legal requirements, information deemed to be "confidential" or "trade secret" by proposer must be clearly marked as such on the face of the document(s) at the time of the initial disclosure/submittal of RFP.** In addition, although not required by law, Wake County requests that any proposer who submits a proposal or response containing any such designation of confidentiality also submit a second copy of the proposal or response with the respective page(s) or section(s) redacted. The County will not agree to withhold an entire proposal or response from public inspection; thus proposers should refrain from including blanket restrictions on disclosure or all-encompassing claims of confidentiality.

When a public records request is made for information contained in or attached to a proposal or response that has been clearly marked as "trade secret" or "confidential" upon its submission, Wake County may, in its discretion and without further notice, release the redacted copy of the proposal or response to the requester if one has been previously submitted. Otherwise, the proposer will be notified of the request and given an opportunity to provide within a reasonable period a written explanation of the basis for claiming protection under N.C.G.S. 66-152 and N.C.G.S. 132-1 and/or a redacted proposal or response. The County shall make the final

determination on release of the information.

Should any civil action be brought against the County in an effort to compel or prevent the disclosure of information contained in a proposal or response that is deemed confidential by a proposer, the proposer may participate at its own expense; and by deeming any information in a proposal or response confidential, proposer further agrees to indemnify and hold harmless the County for and against any costs incurred by the County as a result of such litigation, including but not limited to fees or expenses arising out of N.C.G.S. 66- 153 and N.C.G.S. 132-9.

## 3.0 Detailed Submittal Requirements

### 3.1 Response Format

Responders shall prepare their responses in accordance with the instructions outlined in this section. Responses should be prepared as simply as possible and provide a straightforward, concise description of the responder's capabilities to satisfy the requirements of the RFI. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. The response should be organized into the following major sections:

Response SECTION	TITLE
	Title Page
	Letter of Transmittal
	Table of Contents
1.0	Executive Summary
2.0	Company Background
3.0	Scope of Services Offered
4.0	Proposed Cost
5.0	Attachment A – Technical Requirements

Instructions relative to each part of the response to this RFI are defined in the remainder of this section. Response information should be limited to pertinent information only.

Marketing and sales type information is not to be included.

### 3.2 Executive Summary

(Proposal Section 1.0) This part of the response to the RFI should be limited to a brief narrative summarizing the response. The summary should be oriented toward the business personnel who would use the solution or services and should include technical information and language only to the extent required to describe the solution.

Please note that the executive summary should identify the primary engagement contact for the responder. Contact information should include a valid e-mail address, fax number, and a toll-free telephone number.

### **3.3 Company Background**

(Proposal Section 2.0) Each response must provide the following information about the responder's company. The County, at its option, may require a responder to provide additional support or clarify requested information.

Background information shall include:

1. How long the company has been in business.
2. A brief description of the company size and organizational structure.
3. Company locations.
4. How long the company has been selling the solution or service to clients similar to the County.
5. Listing of clients with contracts of similar scope and size to the County's by name and state.
6. A brief description of any pending litigation.
7. Evidence that the vendor is a corporation, is in good standing and qualified to conduct business in North Carolina.
8. References from at least 3 customers.

### **3.4 Scope of Services Offered**

(Proposal Section 3.0) This section of the response should include a detailed discussion of the responder's overall understanding of the project and the solutions and services that can be provided to support Wake County.

### **3.5 Proposed Cost**

(Proposal Section 4.0) This section of the response should include a detailed cost estimate for the solutions and services. This includes, but is not limited to, design and development, launch, and maintenance of the solutions and services provided to Wake County.