

**July 30, 2012**

**MONTANA STATE FUND  
RFP NO. MSF 48  
RESPONSE DUE DATE: August 13, 2012, 2 p.m.  
TITLE: ORGANIZATIONAL DEVELOPMENT RESEARCH  
AND EMPLOYEE ENGAGEMENT SURVEY**

**ADDENDUM NO. 2**

**To All Offerors:**

**Attached are written questions received in response to this RFP. These questions, along with the Montana State Fund's response, become an official amendment to this RFP.**

**If you submit a proposal to the RFP, you must sign this Addendum No. 2 where indicated, and submit the signed addendum with your proposal. All of the other terms of the RFP remain as originally stated.**

I acknowledge receipt of Addendum #2.

Signed: \_\_\_\_\_

Company Name: \_\_\_\_\_

Date: \_\_\_\_\_

Question Number	Page Number	Section Number	Questions & Answers for RFP # MSF 48
1.	13	3.2.4	<p>Q. Please clarify the tool for Deliverable 4. The tool would seem to need to be software to produce customizable reports but states “MSF is not requesting a software tool.”</p> <ul style="list-style-type: none"> <li>• Please describe the tool in more detail.</li> </ul> <p>A. <b>MSF is requesting a predictive model that will allow input of data (such as age, years of service, time in position, and engagement levels) and utilizing a predetermined formula or parameters, provide a predictive estimate for employment longevity based on those factors. It could be a report generator, spreadsheet or other tool. MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b></p> <ul style="list-style-type: none"> <li>• The data provided through the Portal can be manipulated for purposes of creating custom reports, but additional data cannot be added into the Portal by the client. We can provide access to additional data that may become available from future survey administrations. Will MSF consider a solution that doesn’t allow data to be added?</li> </ul> <p>A. <b>MSF is requesting a model that incorporates MSF-specific data with engagement survey results and issues reports based on that data with the ability to add or adjust data as it changes (ie. add new employees, remove employees, change employee’s age or status, etc). MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b></p>
2.	13	3.2.4	<p>Q. “MSF shall own the tool and have the ability to update data in the tool for future use, without any additional fees or costs.”</p> <ul style="list-style-type: none"> <li>• What exactly would MSF “own” if it’s not software?</li> </ul> <p>A. <b>MSF recognizes the tool may be proprietary to the vendor and does not anticipate owning the formula or the tool. However, we will own the employee <u>data</u> entered into any model that is specific to Montana State Fund as well as the results of the analysis. MSF would not be limited by the vendor in accessing any of the employee data entered. For example, if the vendor went</b></p>

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			<p><b>out of business or the contract was terminated, all employee data provided by MSF would be returned. MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b></p> <ul style="list-style-type: none"> <li>• Is MSF requesting a Portal that can accomplish the requirements of 3.2.4? If so, would MSF consider a lease arrangement for long-term access to the Portal rather than “owning” it?</li> </ul> <p><b>A. MSF requires that we own the data in the model and the results. We would consider leasing long-term access, but we do not currently have an additional budget for such an agreement. MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b></p>
3.	13	3.2.7	<p>Q. Deliverable 7 - What level of consulting support do you anticipate needing; options can range full onsite support, combination of onsite and training of key individuals within the university, and/or online resources?</p> <p><b>A. MSF is expecting the support to be direct communication of the results, the analysis of the data, the use of the model or technical consultation. This can be accomplished via phone conference or web conference. Travel should be limited whenever possible to reduce costs and we do not anticipate on-site support.</b></p>
4.	12	3.2.1 & 3.2.2	<p>Q. The timeline for deliverables indicates the survey questions will be finalized on Oct 1 and survey is to be completed by Oct 15. We do not believe the timeline provides adequate time to build and thoroughly test the online survey tool and then allow at least two weeks for survey administration. Will MSF consider suggested adjustments to the timeline?</p> <p><b>A. 3.2.2 (d) is meant to indicate that the survey <u>development</u> will be completed by October 15. Data collection is to be completed by November 15, 2012 (see 3.2.3 (c)). MSF is willing to be flexible with the deadline in 3.2.2 (d) within reason. We would not consider anything beyond November 15, 2012 to be acceptable.</b></p>

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5.	15	Section 5	<p>Q. “A not-to-exceed estimate of expenses; to include travel and related expenses.” Are the expenses separate from the project budget of \$50,000?</p> <p><b>A. This budget and your proposal shall include all travel expenses.</b></p>
6.	11	3.1	<p>Q. Does the MSF have experience with similar surveys/projects/studies? If so, is a copy of the previous survey available? Is a report of the results from any previous survey available?</p> <p><b>A. There have been no prior surveys on employee engagement as defined in this RFP.</b></p> <p>Q. What has been the response rate from surveys?</p> <p><b>A. Response rates to solicitation of information from employees have averaged approximately 80%.</b></p>
7.	11	3.2	<p>Q. Will all surveys be in English? If not, what languages are required.</p> <p><b>A. Yes. All surveys will be in English.</b></p>
8.	13	3.2.4 & 3.2.5	<p>Q. Is there a MSF organization chart?</p> <p><b>A. Yes, the organization chart will be posted as part of Addendum #3 by August 1, 2012.</b></p> <p>Q. At what levels of the organization are results needed? VP, Director, Manager, Supervisor, etc.</p> <p><b>A. CEO, Vice President, Team Leader, Employee.</b></p> <p>Q. About how many report owners do you anticipate? How many people will need to see their own group’s data for action planning?</p> <p><b>A. While the Human Resources Vice President will be the sole “report owner”, MSF needs the</b></p>

Question Number	Page Number	Section Number	Questions & Answers for RFP # MSF 48
			<b>ability to provide reports by team to appropriate leaders upon request.</b>
9.	12	3.2.1	<p>Q. Is there a designated group that will ultimately oversee the project providing day-to-day leadership during the survey as well as post-survey support?</p> <p>A. <b>Yes, there is a project team assigned to this RFP.</b></p>
10.	12	3.2.2	<p>Q. To what extent will MSF handle development and distribution of survey-related communications and to what extent would you like the survey partner to handle communications?</p> <p>A. <b>The survey partner will distribute and collect survey data. MSF will manage the majority of internal communication about the survey internally. The survey partner will work through the established project team to communicate to staff (i.e. MSF would expect the vendor to communicate to the project team if response rates were low for a particular group. The team would then work with that group.).</b></p>
11.	13	3.2.6 & 3.2.7	<p>Q. How do you plan to communicate the results to employees (e.g. meetings, email, intranet, newsletter, etc), and is the consultant responsible for these communications?</p> <p>A. <b>Results will be delivered by the vendor to the leadership of MSF at the onsite meeting under 3.2.6 (a).</b></p> <p>Q. Will the selected vendor assist with cascading the results throughout the organization?</p> <p>A. <b>The leadership of MSF will be responsible for communicating results throughout the organization following the meeting in 3.2.6 (a). Some assistance for information, clarification or further information may be necessary from the vendor, but we do not anticipate a great deal of vendor involvement in this process.</b></p> <p>Q. What kind of internal expertise/resources does MSF currently possess to facilitate post-survey communications and subsequent action planning?</p>

Question Number	Page Number	Section Number	Questions & Answers for RFP # MSF 48
			<p><b>A. MSF has expertise in the form of a planning unit, project coordinators, formalized business planning structure, and an experienced HR team, including an Organizational Development Specialist.</b></p> <p>Q. Can you provide an estimate of the number of groups for which on-site (versus videoconference) results presentations would be required?</p> <p><b>A. While a video conference with the project team may be necessary prior to the onsite presentation in 3.2.6, MSF is requiring only one on-site results presentation for the leadership team. Any other results communications will be managed internally.</b></p>
12.	5	1.2	<p>Q. Is there an incumbent that was previously providing the services outlined in this RFP MSF 48? If yes, can you please provide the name of the incumbent?</p> <p><b>A. No, there is no incumbent.</b></p>
13.	6	1.6.1	<p>Q. Is there a maximum number of page numbers submitted proposals cannot exceed?</p> <p><b>A. No, there is no maximum number.</b></p>
14.	9	2.4.5	<p>Q. If selected as a finalist will there be an opportunity for an in person meeting to discuss qualifications and written response?</p> <p><b>A. No, all qualifications should be included in the written response as an in-person meeting was not included in this RFP process.</b></p>
15.	11	3.1.1	<p>Q. Are any necessary travel expenses to be included in the \$50,000 cost for services or will travel expense be billed separately?</p> <p><b>A. This budget and your proposal shall include all travel expenses.</b></p>

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16.	11	3.2	<p>Q. Does the MSF have a office/department specifically dedicated to Organizational and Workforce Development? If no, from what department/office/specialty will project team members be comprised of?</p> <p>A. <b>Yes, within our HR department.</b></p>
17.	12	3.2.1	<p>Q. Have engagement survey questions already been developed/determined? If not, is there a maximum number of questions to not exceed if vendor is to develop questions?</p> <p>A. <b>No. The vendor is to provide the survey questions. However, MSF will be involved in determining the questions and format of the survey under 3.2.1 (b) of the RFP. There is no maximum number of questions.</b></p>
18.	12	3.2.1	<p>Q. Has an engagement survey been conducted before? If so, when and will the same questions be used again? Will vendor have access to past survey results?</p> <p>A. <b>There have been no prior surveys on employee engagement as defined in this RFP.</b></p>
19.	12	3.2.3	<p>Q. In addition to the data collect outlined in section 3.2.3 Deliverable 3 – is the MSF looking for recommendations on additional data to collect?</p> <p>A. <b>MSF will consider additional data as recommended by the successful vendor.</b></p>
20.	13	3.2.4	<p>Q. Does any kind of analysis tool exist now?</p> <p>A. <b>No tool currently exists.</b></p>
21.	13	3.2.4	<p>Q. Who will use the analysis tool? It is recognized that a software tool is not desired, are there any system requirements or skill requirements that the tool must fit/target?</p> <p>A. <b>The reports that are generated will be used primarily by the Human Resources department. They will also be used by MSF leadership in conducting succession planning. If training by the vendor is necessary, it should be included in the 8 hours of support under 3.2.7 or added to the</b></p>

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			<b>cost estimate. MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b>
22.	13	3.2.5	<p>Q. When developing recommendations to improve engagement and knowledge transfer, will there be/are there any cost requirements or guidelines that must be considered?</p> <p>A. <b>This should be discussed with the project team prior to finalizing the report. MSF makes every effort to be fiscally responsible.</b></p>
23.	13	3.2.8	<p>Q. At what point will the contractor be notified if they will be requested to perform the engagement survey in FY15?</p> <p>A. <b>No later than June, 2014.</b></p>
24.	16	6.1	<p>Q. Will each vendor be provided with their score on their response?</p> <p>A. <b>Respondents will be provided with their score upon request.</b></p>
25.	5	1.4.2	<p>Q. Will we be able to have a direct conversation with the Procurement Officer, Curt Swenson, prior to the proposal due date – if it is necessary for clarification?</p> <p>A. <b>The Procurement Officer may only respond to procedural questions about the RFP.</b></p>
26.	11	3.1.1	<p>Q. Are travel costs included in the Scope of Work budget as outlined (\$50,000)?</p> <p>A. <b>This budget and your proposal shall include all travel expenses.</b></p>
27.	13	3.2.4	<p>Q. Would you want the tool to incorporate data from outside sources beyond the fields and data referenced in this section?</p> <p>A. <b>Possibly. Any outside sources would need to be approved by MSF.</b></p>

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28.	13	3.2.4 a.	<p>Q. Would you be open to a license agreement type arrangement in lieu of actual ownership of the tool?</p> <p>A. <b>MSF would consider a licensing agreement as long as we own the data in the tool. However, we do not currently have an additional budget for such an agreement.</b></p>
29.	12	3.2.2.c	<p>Q. The RFP states that the “Contractor shall utilize methods to encourage survey responses from all employees.” Would the use of any types of incentives be permitted in recruitment? To what extent would MSF provide support in encouraging employees to participate in the survey (e.g., letter from appropriate leader)?</p> <p>A. <b>Incentives would be permissible, and would need to be included in the costs of your response. MSF will make every effort internally to encourage participation, including team meetings, leadership encouragement and promotion from the CEO and Vice Presidents of the company.</b></p>
30.	12	3.2.2	<p>Q. We note there are 285 employees. By how many positions and teams are those employees organized? Would it be possible to provide an organization chart?</p> <p>A. <b>An organizational chart with the breakdown of employees by team will be posted as part of Addendum #3 by August 1, 2012.</b></p>
31.	N/A	N/A	<p>Q. Has MSF ever conducted an employee engagement survey or other employee surveys of this nature? If so, when were those surveys conducted? What type of response rate was there? Who was the contractor that conducted those studies?</p> <p>A. <b>There have been no prior surveys on employee engagement as defined in this RFP. Response rates to solicitation of information from employees have averaged approximately 80%.</b></p>
32.	13	3.2.8	<p>Q. Should costing for optional deliverable 8 be submitted as a separate line item as part of this proposal?</p> <p>A. <b>Costing for deliverable 8 in section 3.2.8 may be submitted, but will not be a scored section for this RFP. The cost for this deliverable will be negotiated in the future, should this deliverable be requested by MSF.</b></p>

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33	12	3.2.2 – 3.2.3	<p>Q. Would it be acceptable to combine Deliverables 2 and 3 into a single data collection effort to gather information from employees?</p> <p>A. <b>Yes, some of this data could be collected with the same survey. MSF has some of the historical data already and it will simply need to be incorporated into the research by the vendor.</b></p>
34.	13	3.2.4	<p>Q. Given the resulting tool will be used for succession planning, does MSF have employee competency and/or skills data readily available?</p> <p>A. <b>MSF has experiential data, performance measures and specific MSF competency data available. MSF and the selected vendor will have the opportunity to discuss available data at the initial on-site meeting.</b></p>
35.	13	3.2.4	<p>Q. What’s the format of the final tool? Excel spreadsheet?</p> <p>A. <b>The format can be determined by the vendor. Excel spreadsheet would be acceptable. MSF will issue a clarification of the scope of 3.2.4 Deliverable 4, in regards to the tool for the analysis as part of Addendum #3 by August 1, 2012.</b></p>
36.	13	3.2.7	<p>Q. What type of support are you requesting?</p> <p>A. <b>Support can range from technical support or training on the tool to assistance in developing action plans. This can be accomplished via phone conference or web conference. Travel should be limited whenever possible to reduce costs and we do not anticipate on-site support.</b></p>
37.	13	3.2.8	<p>Q. Do we need to provide separate pricing for the follow-up engagement survey? Or is this part of the \$50,000 budget?</p> <p>A. <b>The follow-up engagement survey referenced in section 3.2.8 is not included in the current budget and will be negotiated at a later date upon MSF’s request. The cost of this deliverable is not being considered in the scoring of this response.</b></p>