



South Florida Anchor Alliance
Request for Information (RFI) and RFI Addendum

Regional Marketplace Technology Vendor

Initial RFI released: April 2, 2024
Updated RFI Addendum: December 23, 2024

EXECUTIVE SUMMARY

Health Foundation of South Florida (HFSF) and the South Florida Anchor Alliance (SFAA) are releasing this addendum to the Request for Information (RFI) for the SFAA Regional Marketplace originally issued in April 2, 2024 as it continues the process of reviewing and ultimately, selecting a technology partner to operate the SFAA Regional Marketplace. This document includes the original RFI as well as a list of supplemental questions. Please review the document in its entirety before submission as sections may have been revised to reflect the current state of the SFAA Regional Marketplace.

At this time, HFSF/ SFAA have concluded the first phase of the SFAA Regional Marketplace implementation. The organization is considering several options for the next phase of the pilot program and associated technology. The organization is considering utilizing a SaaS (software-as-a-service) platform, while also exploring a custom build. SFAA/ HFSF anticipates that any future technology implementation will require configuration to meet its programmatic needs, and should allow for robust, non-technical configuration of components including dashboard(s) and reporting.

Because the program continues to be in pilot status, the HFSF/ SFAA values cost-effective and fast-to-implement strategies, even ones that may not meet all of its desired requirements in the short term. It's important to note that priority will be given to a technology solution with the highest likelihood of sustainability and scalability.

This RFI is being recirculated to both vendors who previously submitted a response to the RFI originally published on April 2, 2024 and to potential new vendors interested in submitting for the first time. Please see below for details on how to respond to the RFI.

My firm previously responded to the original RFI posted April 2024:

If you previously submitted a response to the original RFI posted in April 2024, and are still interested in providing technology services to SFAA, you may revise your response to the initial RFI if there is any new or additional information you would like to share. If not, please answer the questions outlined in the Addendum only and submit full application per submission instructions. Please refer to **Section 3.1 - RESPONDING TO THIS RFI ADDENDUM** for more information.

My firm is interested in responding to the RFI for the first time:

We issued an RFI earlier in 2024 (see below) and have recently completed an addendum to the RFI as part of the ongoing selection process of a new technology partner for the SFAA Regional Marketplace. We're interested in inviting additional firms to submit proposals. Please refer to **Section 3 – SUBMISSION REQUIREMENTS** for more information.

Note:

Please note that this RFI + Addendum process concludes the selection process for a new technology platform to operate the SFAA Regional Marketplace. The Addendum to the RFI contains additional background information based on a survey of participating anchors and a series of supplemental question

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SECTION 1 – Request for Information (RFI) TIMETABLE

RFI available for distribution: December 23, 2024

All questions to be submitted by: January 20, 2024 at 5 p.m. EST

Email questions to: SFAARegionalMarketplace@hfsf.org

Responses to questions will be posted to the South Florida Anchor Alliance (SFAA) website, and the responding entity is responsible for monitoring this site for responses to the questions. The website link is the following: www.southfloridaanchoralliance.org.

Deadline For Submissions: January 24, 2024 by 5 p.m. EST

Selection of top three (3) applicants: February 10, 2025

Presentations: February 2025. The top 3 applicants will present to a Technology Review Committee that is overseeing the selection process.

Selection: Expected late March/Early April 2025

SECTION 2 – BACKGROUND

This section identifies the performance levels desired by the Health Foundation of South Florida and South Florida Anchor Alliance members. Respondents are instructed to indicate a response to ALL service requirements and specifications contained in each section in the order listed using the same numbering system.

SECTION - 2.1 GENERAL INFORMATION ABOUT ORGANIZATION

South Florida Anchor Alliance, an initiative of the Health Foundation of South Florida is a collaborative of regional institutions—hospitals and healthcare systems, education enterprises and municipalities-coming together to harness their collective multi-billion-dollar spending power and vast human and intellectual capital to create a more just and inclusive local economy. It was founded by The Health Foundation of South Florida, with support from Citi Community Development.

An anchor institution is an organization deeply rooted in the local community by virtue of its invested capital and/or relationship to its constituents. In South Florida, anchors have the power to provide tremendous opportunity for economic growth for the region's small business owners. When an institution adopts an anchor mission it means it commits to intentionally leverage its resources to address the needs of the surrounding community.

In South Florida, across Miami-Dade and Broward counties, the 11 anchors participating in the South Florida Anchor Alliance Regional Marketplace (SFAA Regional Marketplace) spend approximately \$10 billion a year on goods and services. Anchors participating in the SFAA Regional Marketplace are intent on increasing their procurement spend amongst Local, Small and/or Minority-owned businesses as they envision a more thriving community.

SECTION - 2.2 PURPOSE OF REQUEST FOR INFORMATION

The Health Foundation of South Florida, the region's largest philanthropic organization focused on achieving health equity in historically underserved communities, has invested \$1.4 million through its SFAA initiative to develop the Regional Marketplace, a two-year pilot program aimed at increasing access to procurement opportunities for Local, Small and/or Minority-owned businesses.

The SFAA Regional Marketplace launched in 2023 and is a free online platform designed for Local, Small and/or Minority-owned businesses to access billions in contracting and purchasing opportunities from participating regional anchor institutions. Currently there are 11 participating anchor institutions across Miami-Dade and Broward County.

Objectives of the SFAA Regional Marketplace:

The 11 participating anchor institutions have collectively agreed to adopt a technology solution that would, at a minimum, accomplish four things:

- 1) **Increase vendor pool for participating anchors** visibility for vendors across all participating anchor institutions by establishing a collective vendor network of Local, Small and/or Minority-

owned businesses. This means that whether a vendor is registered with an anchor or not, vendors are visible to that anchor and can be matched to procurement opportunities.

- 2) **Enhanced matchmaking** that connects the vendors, based on their qualifications and experience, to the right procurement opportunities.
- 3) **Automate** the full cycle from vendor uploads, procurement uploads and bid and award data uploads.
- 4) **Data Tracking** of the vendor experience both on an aggregate level and an individual anchor level.

In alignment and advancement of the two-year SFAA Regional Marketplace pilot the technology solution must be able to integrate with existing procurement systems at each of the anchors, it is not the intent of the selected SFAA Regional Marketplace technology platform to replace the existing procurement software currently utilized by anchor institutions. Thus, bidding and awarding of procurement contracts will remain outside of the selected SFAA Regional Marketplace technology platform, however it is highly desired that the selected technology vendor be able to track whether vendors matched in the system have bid for procurement opportunities they were matched with and whether they were awarded a contract.

SECTION - 2.3 PROPOSAL CONSIDERATIONS

Please note that this RFI + Addendum process concludes the selection process for a new technology platform to operate the SFAA Regional Marketplace.

SECTION - 3 SUBMISSION REQUIREMENTS

The entire proposal packet must be submitted electronically to SFAARegionalMarketplace@hfsf.org. All proposals must be neatly typed on 8 1/2" X 11" page size, with normal margins and spacing.

Proposals must be received by the deadline for receipt of proposals specified in this RFI Timetable (Section 1).

Proposals are due to the Health Foundation of South Florida on the date and time indicated in Section 1. **Proposal response submission to the Health Foundation of South Florida on or before the stated time and date will be solely and strictly the Respondent's responsibility. The Health Foundation of South Florida will not be responsible for delays in Respondent's submission of their proposal.**

Proposals must be signed by an authorized officer of the Respondent who is legally authorized to enter a contractual relationship on behalf of the Respondent.

SECTION - 3.1 RESPONDING TO THIS RFI ADDENDUM

HFSF/ SFAA has provided the information in this addendum to allow firms that previously responded to the Technology Marketplace Vendor RFI to submit additional materials and/or revise their previous submissions based on this more detailed information.

If you're a new respondent, please ensure you respond to all aspects of the original RFI in addition to the questions below. This addendum supplements but does not replace the original document.

If you are a previous respondent, and you have addressed any of the below information in your original response, please feel free to reference your original document when responding to the below.

- If you're proposing the implementation or adaptation of an existing product, please include detailed descriptions (ideally with screenshots or videos) of the system's current capabilities.
- If you're proposing building a new system, describe your approach to the components listed below.

SECTION - 4 REQUIRED INFORMATION TO BE SUBMITTED

Responses to this RFI should be concise and straightforward. Please ensure that the following required areas are addressed in your response:

A. Cover Sheet/Letter of Interest including the following:

1. Legal name of entity submitting RFI, including Joint Venture, etc. (as applicable)
2. Business Address
3. Years in Operation
4. Phone Number
5. Electronic Mail Address for contact person
6. Website (if applicable)
7. Organizational Chart

B. Narrative to include the following:

1. A summary of experience and qualifications with content examinations and related experience relative to the purpose of this RFI.
2. A list of references, if applicable, for previous experiences should include government entities, school Districts, colleges or universities and/or hospital systems.

C. Conceptual ideas to include the following:

1. Implementation – provide a conceptual approach to effectively perform the objectives solicited in the RFI Section 2.2. In addition to objectives solicited in Section 2.2 please share any additional services and system functions offered. Submittals from interested parties should be detailed enough to show that they could undertake this type of project, as described.

Section - 4.1 Original RFI Questionnaire

Please respond to all questions included in the below questionnaire. Narrative responses should be submitted using the same format as noted.

1. Is your technology solution customizable based upon local needs? If your answer is yes, please provide examples of how you have done this before. How would customization impact pricing model, if at all? How would the respondent address technology challenges/problems with the SFAA Regional Marketplace anchor members?

2. Is the technology configurable? Please provide examples of different configurations offered that are similar in scope.

3. What experience does the Respondent have working with local, small and/or minority-owned vendors? Please explain your knowledge of the South Florida small business ecosystem. Please explain how you will partner with the SFAA Regional Marketplace anchor members to ensure local vendor participation. Is this included in your pricing model?

4. Does your system have the ability to track and seamlessly report the complete journey of vendor engagement from SFAA Regional Marketplace profile activation, proper vendor matching and tracking, bidding, award, technical assistance, etc.; automated outreach/engagement via email and through outreach campaigns to encourage vendor engagement; and procurement systems integration/interface to eliminate manual uploads. Please provide a summary of how your system addresses and/or can address these elements
 1. # of vendors registered in the South Florida Anchor Alliance Regional Marketplace (Collected in the aggregate and individually per anchor)
 2. # of vendors certified with participating anchors (Collected in the aggregate and individually per anchor)
 3. # of SF Regional Marketplace vendors matched with any anchor RFPs (Collected in the aggregate and individually per anchor)
 4. # of SF Regional Marketplace vendors expressing intent to bid on anchor RFPs (Collected in the aggregate and individually per anchor)
 5. # of SF Regional Marketplace vendors that are certified with participating anchors (Collected in the aggregate and individually per anchor)
 6. # of SF Regional Marketplace vendors have been awarded an anchor RFP (Collected in the aggregate and individually per anchor)

5. Does your system currently have a client dashboard? If so, what reporting functions are currently tracked and visible on the dashboard? Can it filter by geographical area, by individual anchor? Can changes be made to the dashboard to better align with the SFAA Regional Marketplace anchor member needs?

6. What experience does Respondent have in developing similar projects? (Briefly describe the projects(s) and describe when the projects(s) commenced and were completed).

7. What expertise and experience should the SFAA Regional Marketplace anchor members require from a Respondent if a future solicitation is issued to expand the SFAA Regional Marketplace including the Respondents vision to ensure the full realization of the objectives of the SFAA Regional Marketplace?

8. What would the Respondent consider to be the desired minimum term agreement for the Respondent to be interested in and ensure the full realization of the goals of the SFAA Regional Marketplace?

9. If Respondent is not the current technology vendor of the SFAA Regional Marketplace, how would you approach a vendor transition between technology solution?

Section - 4.2 Supplemental Questionnaire as Part of RFI Addendum

Technology and Data Management Approach:

1. Please describe how you are proposing to fulfill the goals of the RFI and this addendum generally; are you proposing to utilize and adapt an existing product or products, or are you proposing a custom development process?
2. Please provide an overview of how your system or proposed solution would manage each of the data types described above:
 - How would it manage vendors and documenting the certifications and associations linked to each vendor
 - A discussion of how it would provide timely matches to RFP opportunities for vendors
 - How would you propose managing bid information, given the potentially limited data sources for this data type
 - What will be your approach to collecting and analyzing contract / award data?
3. If you are proposing to implement/ customize an existing product, what is your technology stack and how is your product hosted? If you are proposing a new build, what technologies do you propose building with?

Integrations:

4. Please include any relationships and experience integrating with the systems listed in the charts included for each data type (if you have such experience).
5. Please describe your approach to integrations and how you would address managing the multiple data sources and formats described above to achieve the time-based goals for RFP-to-vendor matching-to-bid-to award and other key program goals?

User Access:

6. What levels of user access/ privileges does your system or proposed solution support?

Technology Best Practices:

7. Please describe how your team deals with bugs/ outages and manages customer support for admins and end users.
8. Please describe how your organization manages data security, including your security protocols, encryption status, breach protocols, and whether your system captures sensitive data (for example, sole proprietor vendors may use their SSNs in place of EIN numbers).
9. Please describe your approach to ADA / WCAG accessibility.

10. Please describe your data ownership policies.
11. Does your team provide customer support to end users on an ongoing basis? If so, what tools and systems do you use? If not, how might you support SFAA in establishing customer support tools and practices?

Project Management and Client Engagement:

12. Please describe whatever additional diligence process/ timeline you would anticipate as part of your proposal.
13. Please elaborate on your standard client onboarding and client management process?
14. How does your team manage roadmaps and ongoing/ unexpected feature requests?
15. HFSF/ SFAA is seeking a technology partner that can support its ambitious goals and manage the complexities of a multi-stakeholder program. Please describe any experience with a similar product/ process, with an emphasis on your product management process and communication.
16. How will you staff this project and who will be the primary point of contact?

Implementation plan, Pricing model and costs:

17. Please provide any revision to previously proposed pricing or provide pricing as part of a new response to this RFI and addendum. Provide an implementation plan with a timeline linked to your proposed payment schedule.
18. What is your standard process for ongoing subscription and/or maintenance after an initial implementation is completed?

Company background:

19. What is the business structure/ funding status of your company?

SECTION - 5 EXHIBITS

- Exhibit 1 Cover Page
- Exhibit 2 Acknowledgment of Amendments
- Exhibit 3 SFAA Member Technology and Data Systems: Overview
- Exhibit 4 Data Management Details (SFAA Regional Marketplace Organization Survey Results)
- Exhibit 5 Appendix

Exhibit - 1 Cover Page for Proposal

RESPONDENT'S NAME (Name of firm, entity or organization):		
FEDERAL EMPLOYER IDENTIFICATION NUMBER:		
NAME AND TITLE OF RESPONDENT'S CONTACT PERSON:		
Name: _____		
Title: _____		
MAILING ADDRESS:		
Street Address: _____		
City, State, Zip: _____		
TELEPHONE:	FAX:	E-MAIL ADDRESS:
RESPONDENT'S ORGANIZATIONAL STRUCTURE:		
<input type="checkbox"/> Corporation <input type="checkbox"/> Vendorship <input type="checkbox"/> Proprietorship <input type="checkbox"/> Joint Venture		
<input type="checkbox"/> Other (Explain): _____		

RESPONDENT'S SERVICE OR BUSINESS ACTIVITIES:		

RESPONDENT'S AUTHORIZED SIGNATURE:		
The undersigned hereby certifies that this bid is submitted in response to this solicitation.		
Sign Name: _____ Date: _____		
Print Name: _____ Title: _____		

Exhibit - 2 ACKNOWLEDGEMENT OF AMENDMENTS

Instructions: Complete Part I or Part II, whichever is applicable.

PART I: Listed below are the dates of issue for each addendum received in connection with this RFI.
Please include a signed copy of each addendum.

Addendum #1, Dated _____, 20__

Addendum #2, Dated _____, 20__

Addendum #3, Dated _____, 20__

Addendum #4, Dated _____, 20__

PART II:

No Addendum was received in connection with this RFI.

Authorized Signature: _____ Date: _____

Print Name: _____ Title: _____

Federal Employer Identification Number: _____

Firm Name: _____

Address: _____

City/State/Zip: _____

Telephone: _____ Fax: _____

Exhibit - 3 SFAA Member Technology and Data Systems: Overview

Ten core member organizations, which include municipalities, counties, school districts, universities, and health systems/ hospitals, participated in the SFAA Regional Marketplace Pilot. Because of the diversity of its membership, and the potential for SFAA to add additional members in the future, it's essential that any technology system be flexible and accommodate SFAA current and future members' well-established systems of data tracking and recordkeeping.

Member organizations periodically upgrade or change their data management systems; for example, two SFAA members are currently in the process of updating core components of their procurement technology stack. These changes will continue at unpredictable rates going forward. It's likely (but not guaranteed) that future infrastructure changes will increase the likelihood that programmatic/ automated data management solutions can be implemented across data types and member organizations.

Members' current systems range from complex implementations of Oracle and Peoplesoft ERPs, to specialized products for SMB management (B2GNow) to custom-built internal systems. Many members have multiple internal point solutions for the four data types described below that aren't integrated with each other. Some of these systems may easily support API integrations, others will not, and some might be available for integration with a SFAA-built system, but not open to integrations with perceived potential competitors. SFAA is seeking a reasonable, cost-effective solution for managing the four data types described below.

SFAA's goal is that as many partner systems and data points are managed through automated/ automatic integrations (via APIs or other automated connections), but full integration may require a longer time frame in some instances or may not be feasible / cost-effective. It's recommended that respondents consider in advance what strategies (e.g. options for fallback .csv uploads of data) can be provided for which data types. In your response, please provide specific strategies for managing these integration and data management needs, which may be different for each of the data types described below.

Historically, SFAA members were able to provide most of the data described below to SFAA (with the notable exception of detailed bid data). With the exception of those Anchors that provided RFP data via API connection (DemandStar users), most didn't convert that data from whatever format they exported it in (for example, a .csv export from Govspend of RFP data, or an excel sheet from their contract management system of awards) to a standardized .csv upload formats. Vendor and RFP data upload options were provided during the first phase of the Technology Marketplace pilot, but typically data was not delivered in those requested formats. Consequently, additional data cleaning and manipulation was required to make received files uploadable. Some of these data management challenges may be made less burdensome through the use of AI or the features of a new system. Ideally, the selected technology solution will automate, to the extent possible, data management across the key data points of interest to reduce burden placed on the anchors in either the provision or the analysis of the data.

Exhibit - 4 Data Management Details Survey Results

During the pilot phase of the project, SFAA asked each of its members to share lists of their “certified” vendors (see data points collected in chart below) that each member tracks in its system(s). Note that the type of vendor that SFAA seeks to support are small, local, minority- and women-owned vendors. Anchors don’t necessarily track the same categories of vendors (some don’t do any “certified” vendor tracking at all) nor do they track the same data types and values for vendors. Some track all vendor data points in a centralized system, while others use a general vendor system and a supplementary system for small/ local/ and/or minority vendors (often but not always B2G Now). During Phase 1 of the project, all anchors shared vendor data via .csv files/ spreadsheets.

Increasing the number of participating vendors and increasing those vendors’ engagement level with potential opportunities is a core goal of the next phase of the Technology Marketplace, as expressed in goal 1 (**Increase vendor pool**).

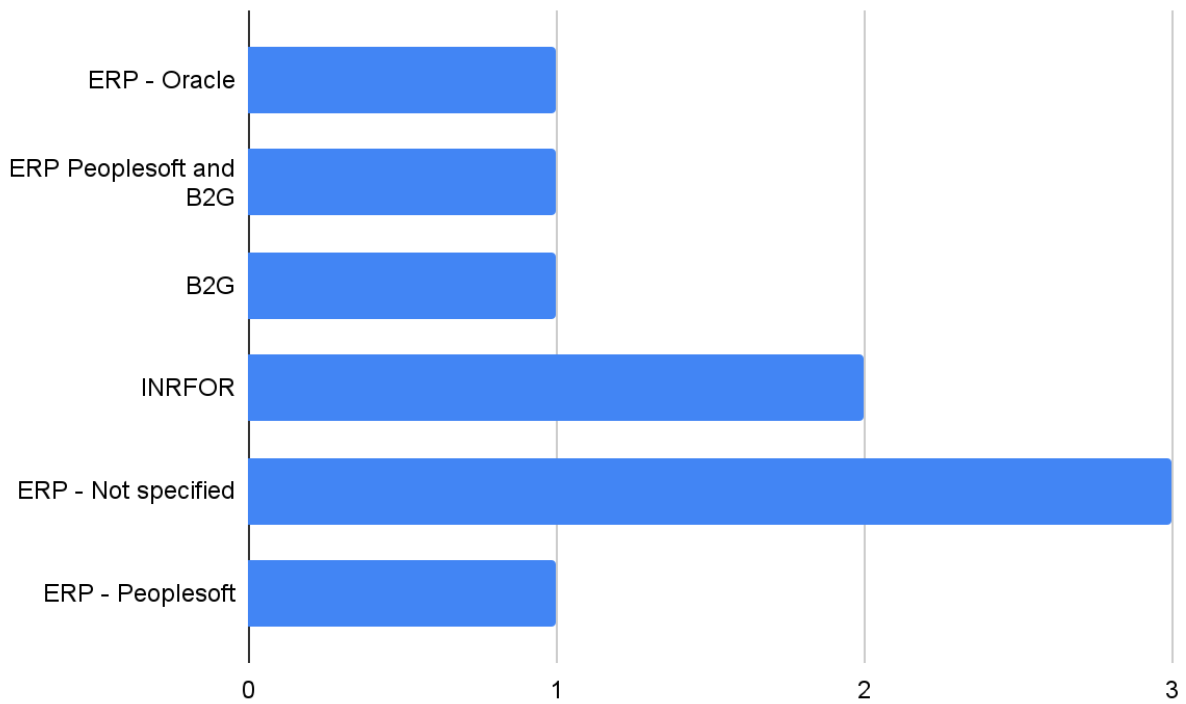
In the past, even though SFAA members conducted regular outreach to each of “their” vendors regarding the SFAA marketplace and business opportunities, vendor participation and enrollment in the marketplace was lower than expected, and many vendors never completed their profiles or received notification of potential contract opportunities. Vendor activation rates were approximately at 13% at the end of the pilot period.

While each organization is interested in tracking whether “their” vendors are able to access increased contract opportunities, the organization is open to proposals that fundamentally rethink the way a new system could manage vendor data. For example, new systems could:

- Scrape data from other state/ local/ national certification systems and automatically add South Florida certified vendors to the system
- Use AI to find and/or categorize vendors via publicly available datasets, their websites, or business license datasets provided by participating counties
- Rather than maintaining a relatively static set of vendors, search for local vendors for each new RFX opportunity posted to the system.
- Provide automatic multi-Language support for vendor interactions
- Other innovative strategies not listed above.

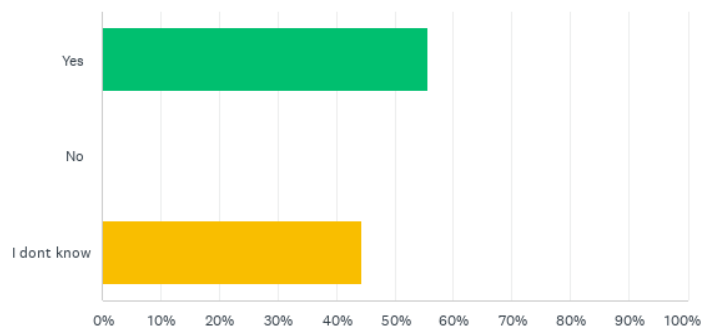
Survey Responses: Vendor Data

How SFAA Regional Marketplace members currently track vendor information (certified and/or non-certified vendors):



Does your vendor data storage method allow for API integration?

Q7 Does the method you're using currently allow for an API integration?



Data collected on vendors

	# collecting this information
Contact Information	9
Certification Status	9

Service/Industry Category	9
Contract History	9
Performance Metrics	8
Past Procurement Opportunities	8
Is a small/ micro business	8
Gender (Woman-owned)	9
Local vs. Non-Local	9
Ethnicity/Race	9

RFP data management

The components necessary to fulfill Goal 2 of the RFI (**Enhanced matchmaking**) are access to a robust list of local target vendors, complete and comprehensive access to RFP data, and a technology solution that efficiently connects these two types of information in a manner that is engaging and efficient for vendors which often have limited attention, time and resources to respond to contract opportunities.

RFP/Rfx management is the area where there is the most consistency among SFAA member organizations in data management. Historically, this has been the data type that was most effectively ingested into the Phase 1 Pilot system via API connection for anchors using Euna software products (DemandStar and/or Bonfire). Four of nine Phase 1 participants used these products and had these automated connections pulling RFP data. Enhancements are desired for Phase 2 of the pilot project, for example, the API connection into the DemandStar system was somewhat limited, and in future would be much more useful if it included more extensive data on each Rfx opportunity (either the full RFP documents or an extended summary, as only limited metadata was available previously). Additionally, three SFAA members post at least some of their RFPs to Govspend, for which an API connection was not available. Govspend offered only a .csv export option, API connections may (or may not) be available going forward. Additionally, other anchors have in-house systems which do not have pre-existing API capability.

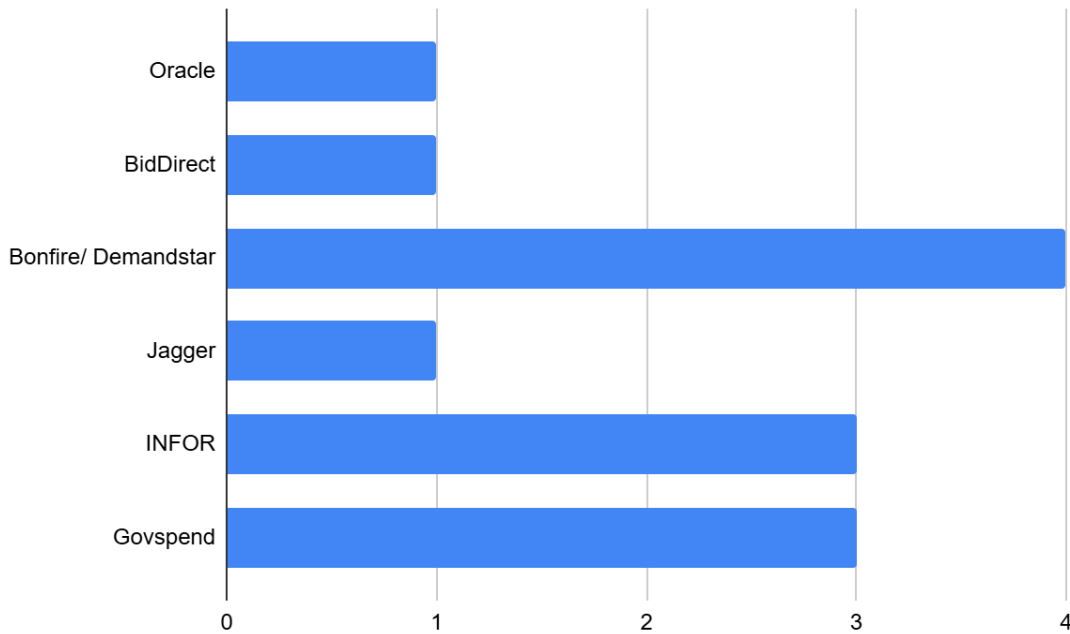
Please note that this is the data type that arguably is the most time-sensitive for the successful operation of this program. For example, during Phase I of the pilot project if a member institution was sending a weekly data export of RFP data on Fridays, there would be a delay in uploading that data into the system (especially if there were errors or missing data). Therefore, the RFP might have been issued on a Monday, with a response timeline of 7-10 days, but not be added to the system until 7-10 days after it was posted, thereby rendering any matching/ notification activity functionally moot. RFP data is the most essential element to pull and post in real time, as it's not uncommon for member organizations

to require participation in bidders' conferences or to submit responses within a short time period. Any delay in posting RFPs to the system dramatically reduces the likelihood that new potential bidders can find out about and respond to these opportunities.

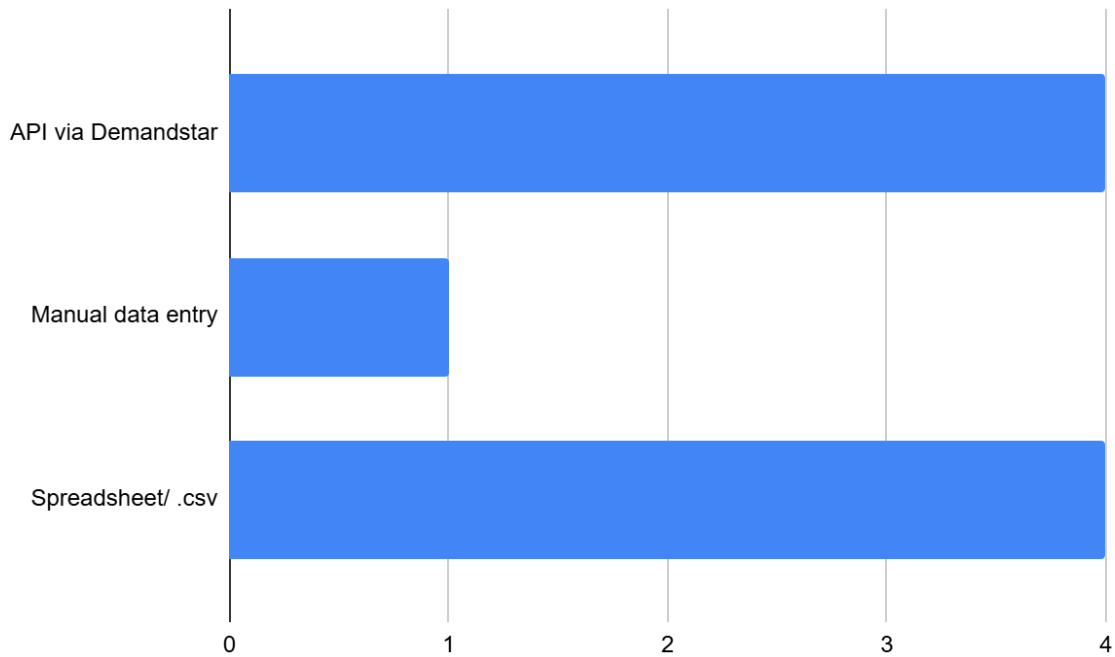
While most RFPs are public documents, please note that some RFPs are private, although SFAA members still would like to have non-public RFPs matched to potential target vendors. The system must allow for RFPs to be "private" and for SFAA members to invite potential matches to respond, without having that RFP data be searchable or viewable without an invitation to view.

Survey Responses: RFP Data

Systems used for RFP data (please note - this adds up to more than total number of partners as some use multiple systems).



Historically, how did you share RFP data with SFAA?

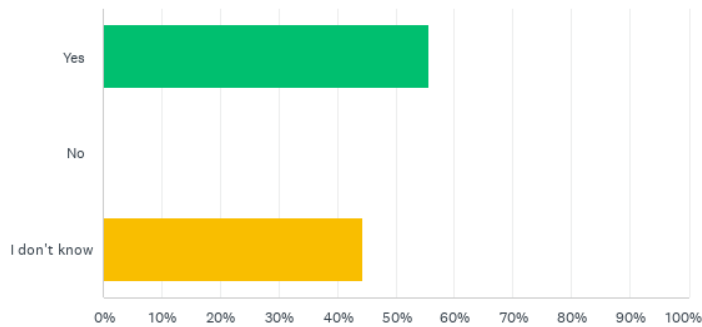


Here is a sample of the types of data available for each RFP. Please note that not all of these data points were available for each RFP:

- Issuing agency
- Issue date
- Close date/ time
- Bidders conference offered/ required
- Bidders' conference date/ time
- Title
- Description
- Budget
- Bidder minimum qualifications
- Submission guidelines

Does your RFX tracking method allow for API integration?

Q15 Does the method you're using allow for an API integration?



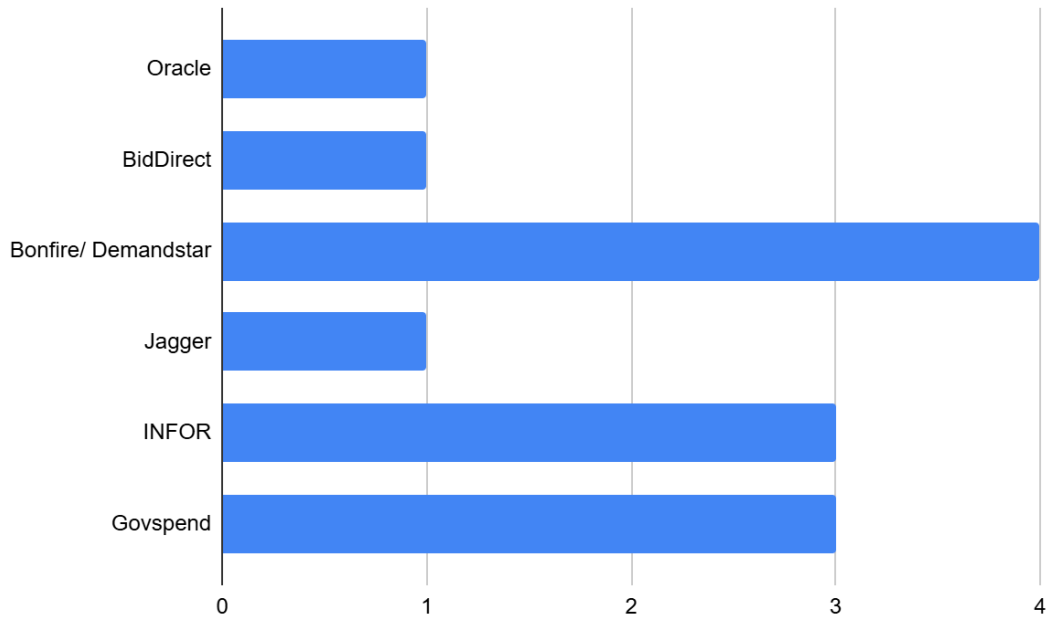
Bid data management

During its first phase, SFAA's Regional Marketplace didn't include any options for programmatic integration of bid or contract award data, despite the necessity of collecting this information to understand the program's impact. Providing some ability to automatically ingest and/or monitor Bidder data is part of RFI Goal 3 (**Automate** the full cycle from vendor uploads, procurement uploads and bid and award data uploads.).

As all bidding and award activity was taking place independently of the Phase 1 technology platform (a situation that will continue for all SFAA members), there was limited ability to track whether a target vendor that had been matched with and interacted with a bid opportunity via the Regional Marketplace had actually submitted a bid. When collecting data for an analysis of the first year of program operations, HFSF found that most SFAA members were not able to provide access to full, detailed lists of bidders for each RFP opportunity. Most were able to provide data on how many bids were received, none provided full data that included which vendors bid on which opportunities.

Survey Responses: Bid Data

Systems used to track bid data: (please note - this adds up to more than total number of partners as some use multiple systems)



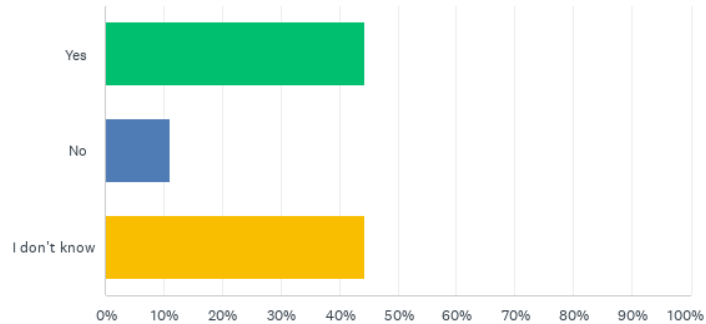
Bid data collected:

Vendor Name	8
Certification Type	8
Bid Amount	8
Date Submitted	8
Procurement Category	8
Outcome (Accepted/Rejected)	7
Other (please specify)	2

Other bid data types collected: EDDC Review Date, Solicitation # and Title, Prime Bidder Name, Certification Status, Proposed sub-consultant/sub-contractor name and Certification Status, Sub Commitment level, Applicable credit for small business participation based on the assigned Affirmative Procurement Initiative.

API integration responses for Bid data:

Q22 Does the method you're using allow for an API integration?



Contract award data management

In order to analyze the impact of the fSFAA Regional Marketplace, participating anchors provided data on contracts awarded. SFAA members identified that the ability for a Technology Provider to automatically ingest contract award data is important to the smooth functioning of the program. Providing programmatic options for contract award data is the core of RFI Goal 3 (**Automate** the full cycle from vendor uploads, procurement uploads and bid and award data uploads.). HFSS/SFAA is prioritizing this particular data point for the next phase of the pilot project.

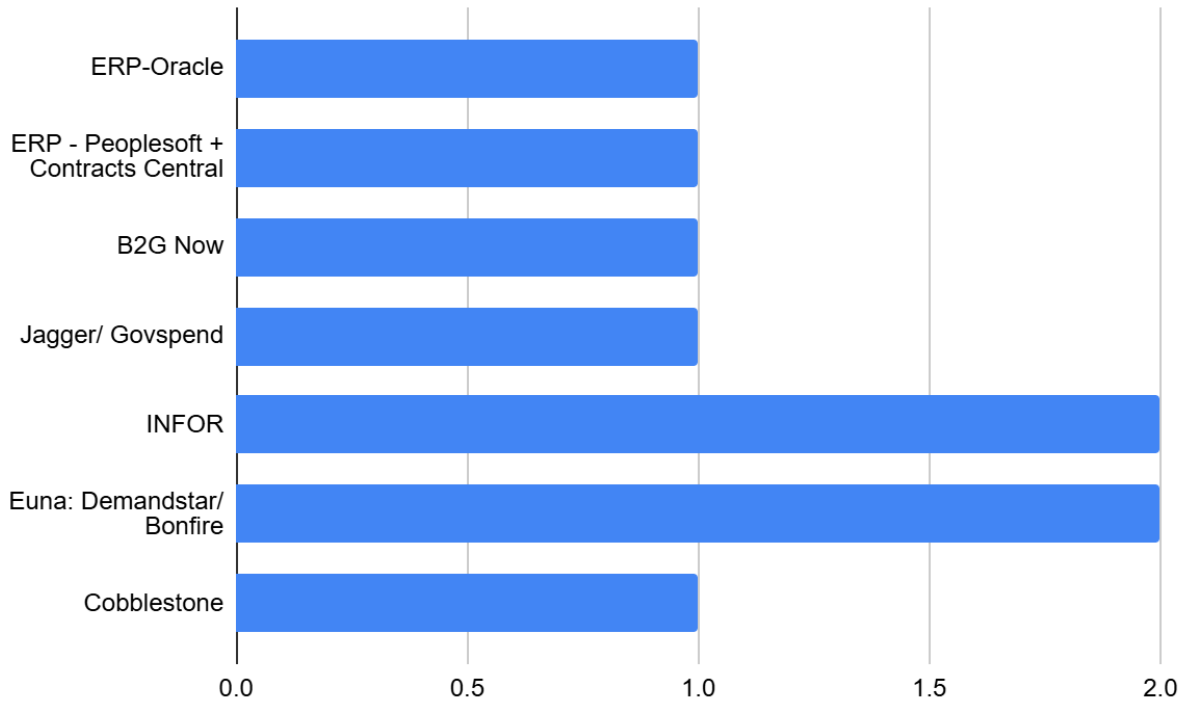
The following data types were provided by most SFAA members for each awarded contract for the previous Phase:

- Contract title (did not always align exactly with RFP title)
- Contract type
- Awardee(s)
- Award amounts (could be a specific amount, a “not to exceed” amount, or no fixed amount)
- Award date

As with all data types, SFAA members use a variety of systems to track contracts and awards. While a few use the same systems for all of their data (vendor/ RFP/ bids/ awards) most store these different data types in different systems.

Survey Responses: Contract Data

How SFAA members track award data (adds up to more than total amount/ duplication of systems)

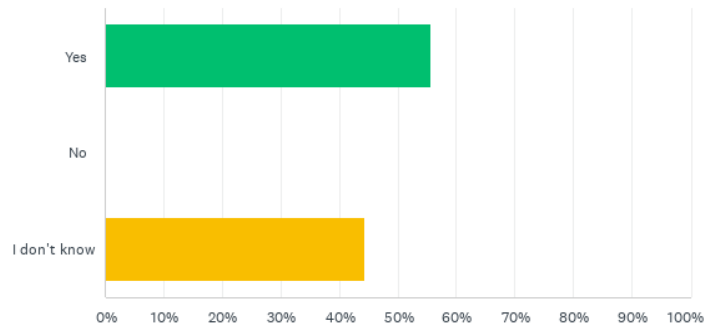


Contract data collected

Vendor Name	9
	9
Certification Type	
Award Amount	9
Project Category	8
Award Date	9
Contract Duration	9
Other (please specify)	2

API capabilities of their contract management data systems:

Q29 Does the method you're using allow for an API integration?



Data and Dashboards

The fourth core Goal of the RFI is to improve the ability for SFAA/ HFSF and its members to understand and analyze the process and impact of SFAA activities. (4. **Data Tracking** of the vendor experience both on an aggregate level and an individual anchor level.)

The SFAA Regional Marketplace will ideally have a series of configurable dashboards that will allow each level of program participant to see and manipulate the data relevant to their work. More detailed data on dashboard data requirements will be determined in collaboration with the Technology Committee.

Frontline SFAA staff:

- Data on RFPs (status, matches, activity and data by time period in aggregate and for each RFP)
- Vendors and vendor engagement (status, activity, location and data by time period and individual vendors)
- Bids and contract awards on each posted RFP and aggregated data
- Data on API connection status and/or data upload success/ errors etc.
- Data filter options by: vendor activity and type / RFP characteristics/ time/ award types and amounts etc.
- Reports on key program goals and metrics as additionally outlined in both the original RFI and above.

SFAA Member management staff/ program leads at each agency:

- Data across staff and program areas
- Data filter options
- Reports on key program goals and metrics

HFSF/ SFAA management:

- Aggregate data across all SFAA members
- Data for individual SFAA members
- Data filter options

- Reports on key program goals and metrics

Data Security

HFSF/ SFAA is extremely protective of the security of its members and vendors' data. While data on the system is not high-risk /protected data, it's still essential that SFAA members and in particular vendors utilizing the system are confident that their proprietary data is protected.

Exhibit - 5 Appendix

Terms

Anchor: SFAA “South Florida Anchor Alliance” member. Please refer to the original RFI for more detail.

Registered vendor: A vendor which is affiliated with a specific Anchor institution and subsequently uploaded to the Technology Marketplace and/or is unaffiliated and registered on the Technology Marketplace directly.

Active vendor: A vendor which had activated its associated account on the Phase 1 Technology Marketplace by establishing a password and/or completing information about its goods and services.

Certified vendor: Some SFAA members are certifying agencies; they designate businesses that have completed their certification process as small/ minority-owned, woman-owned, veteran-owned, local and/or other designations. Some SFAA members rely on the certification processes of other members and/or state or federal level certifications. Some SFAA members track certified and non-certified vendors in the same system, while others have separate tracking systems for their certified vendors.

Non-certified vendor: Vendors that have not received any formal certification from a SFAA member nor from a state or federal certifying body. Please note that some non-certified vendors may possess the characteristics that would qualify them for certification/ contract preferences.

Vendor pool: Historically, SFAA has tried to build a vendor pool by aggregating all the certified and/or preferred vendors from its member organizations.

RFP/ RFI/ RFx: In this document RFP is used as an abbreviation for the many types of procurement opportunities and solicitations offered by SFAA members, which may include

- RFP: Request for Proposals
- RFI: Request for Information
- RFQ: Request for qualifications
- Bench solicitation
- Additional categories

Technical Assistance: SFAA and its members provide technical assistance to vendors via programs, events and workshops. Historically, this was tracked independently of the Marketplace but ideally could be an additional data type integrated into the system.