



# BID ADDENDUM

May 20, 2025

## FAILURE TO RETURN THIS ADDENDUM MAY SUBJECT YOUR BID TO REJECTION

Solicitation Number	<b>Doc155340737</b>
Solicitation Description	<b>Grant Management System</b>
Addendum Number	<b>1</b>

### RESPONSE TO QUESTIONS:

State’s Responses to Questions Received by the due date and time of May 12, 2025, by 10:00 am ET. The Question appears exactly as submitted by the Vendor.

	<b>CITATION</b>	<b>VENDOR QUESTION</b>	<b>DCR RESPONSE</b>
1	2.1 Introduction, Page 4	DCR recently issued RFP No. 1498190011 for the housing program implementation and system of record. Are there any other programs for the total \$1.4 billion CDBG-DR program that will use a separate system of record, or will all remaining programs be administered within the system of record requested in this procurement?	All remaining CDBG-DR programs will be administered within the system of record requested in this procurement.
2	2.1 Introduction, Page 4	Can DCR provide additional details on the programs that will be administered through the system of record within this procurement (e.g., number of programs, type of programs, funding per program, expected	There are four programs that will be administered through the system of record within this procurement. They are outlined in the State of NC’s Action Plan that was approved by HUD on April 25, 2025, and can be found online at <a href="#">State of North Carolina</a>

		<p>volume within each program, etc.).</p>	<p><a href="#">Action Plan   DCR</a>. The single-family housing program will be administered by HORNE using the CANOPY™<sup>1</sup> system.</p> <p>The programs are grant-based programs: (1) Multi-family construction program - \$191 million in competitive grant funding to support reconstruction, rehabilitation or construction of affordable rental housing, (2) Workforce housing for ownership - \$53 million in competitive grant funding for the development and construction of units for purchase by low to moderate income households, (3) Commercial district revitalization - \$111 million in competitive grant funding to support revitalization activities (e.g., rehabilitation of commercial structures, small business locations) in impacted commercial areas, (4) Community infrastructure program - \$194 million in competitive grant funding for infrastructure projects that will help Helene impacted communities become more resilient to natural hazards. The expected volume of grants varies by program and applicant types but cumulatively will likely be in low thousands.</p>
<p>3</p>	<p>2.1 Introduction, Page 4</p>	<p>DCR states that the system must integrate with the North Carolina Financial System (NCFS). What platform does North Carolina use</p>	<p>Oracle ERP Cloud Service provides below methods for <b>outbound</b> interfaces:</p> <ul style="list-style-type: none"> <li>- BI Report Approach</li> </ul>

<sup>1</sup> CANOPY™ is a proprietary solution developed by HORNE Federal to respond to federal and state programs to track and monitor funding streams.

		<p>as the NCFS? Can DCR provide any additional details on the NCFS system (e.g., API capabilities, underlying platform, etc.)?</p>	<ul style="list-style-type: none"> <li>- Web Services Approach</li> <li>- Hybrid—Web Services along with BI Report Approach</li> </ul> <p>Oracle Cloud Service provides multiple options to retrieve data from the underlying SaaS database and share it with the external system. The following are the different data sets that can be used in Cloud-based outbound interfaces for various use cases:</p> <ul style="list-style-type: none"> <li>- Outbound Cloud data, which requires data manipulation based on third-party systems</li> <li>- Outbound Cloud data, which requires complex data validation and transformation prior to sending the data to target SFTP Server</li> <li>- Outbound Cloud data, which would be directly sent to third-party system with no transformation or with very little transformation.</li> </ul>
4	3.5.7 (INT-1) System Interface, Page 10	<p>The RFP states the system must interface with the Awarded Implementation Vendor's Software. Has DCR selected an Implementation Vendor? If so, can DCR provide additional details on the system of record selected? If not, can DCR provide a timeline on when the Implementation Vendor will be awarded?</p>	<p>The Implementation Vendor contract was awarded to HORNE LLP on May 9, 2025. The HORNE system of record is based upon CANOPY™.</p>
5	3.5.7 - 3 Technical Specifications TC-8, Page 11	<p>If the Bidder currently carries \$5-7 million in cyber liability insurance, would that level be acceptable to DCR? If not, could the bidder submit proof of the current insurance amount with a commitment to increase to \$10</p>	<p>Proof of current level of insurance with a commitment to increase to \$10 million upon award will be sufficient.</p>

		million should the bidder be awarded?	
6	3.5.7 - 8 Reporting, Page 14	Does DCR expect the selected vendor to build and manage all dashboarding and reporting? Or will DCR have a reporting team that will leverage the data collected through the system of record to complete the reporting in-house?	Yes. DCR expects the selected vendor to build essential dashboards and reports initially. DCR staff would leverage the data collected through the system of records to manage, customize and support dashboards and reports in-house.
7	6.1.19 General Instructions for Offer, Page 25	DCR has provided Attachment D: Cost for the Bidder. Will DCR allow the Bidder to provide additional narrative to support the budget? If so, can this be provided within a separate attachment or within the body of the proposal response?	Vendor must complete Attachment D: Cost Form (Excel file) as provided in eProcurement Sourcing.  Excel file, Row 14 and Row 33 "Other Costs: Must be itemized in detail", Vendor may add a worksheet to the Excel file located in Sourcing or provide additional details in the narrative.
8	Attachment D: Cost Form, Page 60	DCR requests for travel expenses to be included. Is there a particular line item within Attachment D in which DCR wants travel expenses included?	Travel cost need not be itemized, but rather any anticipated travel expense should be included in the cost estimate (see attachment B section 1 #5).
9	Attachment D: Cost Form, Page 60	DCR requests for travel expenses to be included. What is DCR's expectation of the team to be on-site?	DCR does not expect the team to be on-site very often as long as they are available.
10	2.3 Summary of Problem Statement, Page 5	Regarding DCR's current reliance on disconnected systems - What systems are currently used?	DCR's current disconnected systems are NCFs and the implementation vendor system of record (HORNE's version of CANOPY™). As a newly created division, DCR does not currently

			have a grants management system.
11	3.2 Security Specifications for Applicant-Facing Technology Solutions, Page 7	We require an NDA to share our SOC 2 type II report. Will the State sign our NDA prior to the due date so we can include our SOC 2 Type II report as part of our proposal as is required?	No. You may mark as confidential as instructed in the RFP.
12	3.3.1 Architecture Diagrams, Page 7	We require an NDA to share our architectural diagrams. Will the State sign our NDA prior to the due date so we can include our architectural diagrams as part of our proposal as is required?	No. You may mark as confidential as instructed in the RFP.
13	7.2 Financial Statements, Page 27	Financial statement confidentiality - can you confirm that the only version of this document that would be shared as part of a public records request will be the redacted version?	Yes.
14	3.5.7 – 10 Data Management, Page 14	Regarding the requirement, "Migrate data at least daily from your Solution to DCR's Systems of Record to provide current and historical transactions.", Which Systems of record will we need to migrate from? Just NCFS?  a. Can you please estimate roughly how many grant records would need to be migrated from the previous systems? Organizations? People? Reports? Documents?	The system of record in this procurement will be required to interface daily with NCFS and with CANOPY™ (the HORNE implementation vendor solution).  Currently DCR does not anticipate migrating grant records from a previous system. At this time, DCR is only handling CDBG-DR for Helene. In the event that DCR has to take on any remaining work from NCORR, there may be a few hundred records to be migrated from Salesforce. A general description of data migration capabilities will be sufficient in response to 3.3.6 Data Migration.

15	<p>3.5.7 <i>No additional information, including page number provided by Vendor</i></p>	<p>NCFS and other required integrations</p> <ol style="list-style-type: none"> <li>Can you share technical documentation that can help us scope the cost of building this integration?</li> <li>What formats does NCFS and other systems support (e.g., REST APIs, SFTP, XML)?</li> <li>What data needs to be sent between the two systems? E.g., vendors? invoices? Invoices back?</li> <li>Should interfaces be bidirectional or one-way? Please confirm for each system where integration is required.</li> <li>Are there any existing validation rules for financial workflows (e.g., thresholds, batch controls, or pre-approvals)?</li> </ol>	<p>Oracle ERP Cloud Service provides below methods for <b>outbound</b> interfaces:</p> <ul style="list-style-type: none"> <li>– BI Report Approach</li> <li>– Web Services Approach</li> <li>– Hybrid—Web Services along with BI Report Approach</li> </ul> <p>Oracle Cloud Service provides multiple options to retrieve data from the underlying SaaS database and share it with the external system. The following are the different data sets that can be used in Cloud-based outbound interfaces for various use cases:</p> <ul style="list-style-type: none"> <li>– Outbound Cloud data, which requires data manipulation based on third-party systems</li> <li>– Outbound Cloud data, which requires complex data validation and transformation prior to sending the data to target SFTP Server</li> <li>– Outbound Cloud data, which would be directly sent to third-party system with no transformation or with very little transformation</li> </ul>
16	<p>3.5.7 <i>No additional information, including page number provided by Vendor</i></p>	<p>Please give examples of “Commonly used Enterprise Database Software”.</p>	<p>On-premise or cloud-based Oracle and Microsoft SQL server.</p>
17	<p>3.5.6</p>	<p>Custom KPIs - please provide examples of KPIs NC DCR would like to track. Are these KPIs at the program-level, grant level, or both? What are the expectations for reporting capabilities on these KPIs?</p>	<p>It is possible DCR will want to establish KPIs both at the program and grant level. Types of KPIs DCR might consider include those that reflect measurable, quantifiable progress towards established goals. Some KPIs will be determined based on DRGR reporting requirements (for example: # of Housing Units, # of Single family Units, # of Multifamily Units, # of Households,</p>

			<p># Owner Households, # Renter Households, # of Businesses, # of Permanent Jobs Created, # of Permanent Jobs Retained, # of Public Facilities, # of Linear feet of Public Improvement, demographic information, project completion dates, etc.). Beyond DRGR requirements, KPIs of interest may include those similar to the following hypothetical examples: percent of geographic area included in outreach, count of counties supported through funding type, percent of stated milestones completed, etc.</p> <p>Expectations for reporting capabilities would include the functionality to allow DCR to 1. Collaborate with recipients to establish/enter KPIs, 2. create automated reminders to inform recipients when KPI reporting/data is due, 3. check and approve provided KPI data (with potentially 1 or more reviewers needing to approve) 4. (potentially) provide narrative feedback on KPI data submissions 5. run reports on status of KPI establishment, KPI data submission, KPI progress status, overdue KPI data, etc. Desired functionalities for recipient include to 1. Establish relevant KPIs, 2. receive automated reminders of when KPI data is due, 3. submit KPI data, 4. receive confirmation when KPI data is submitted/reviewed and approved or rejected (potentially with notes providing clarification on why KPI data was rejected) 5. view previously submitted KPI data/run reports demonstrating KPI progress with all previously reported KPI data.</p>
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18	3.5.7 Page 16	What level of involvement and interaction is expected from the Technology Manager with State stakeholders? Does the State prefer an embedded resource or a point-of-contact model?	Medium involvement and interaction are expected from the Technology Manager with State stakeholders. Schedule routine Monthly communication/online meeting would be very helpful. Embedded resource model would be preferred.
19	3.5.7 Page 10	How frequently does the State anticipate needing system modifications post-implementation?	Semi-annually or annually. Semi-annually in early stage of program. Annually in later years of program.
20	3.5.7 Page 10	Does the State expect the vendor to proactively suggest platform enhancements over time?	Yes.
21	5.2 Page 19	System Retention and Archiving - Are there specific archiving, purging, or data retention standards beyond the 5-year post-closeout requirement?	The data may be purged after the 5-year post-closeout requirement. DCR may ask vendor to retain data longer than 5 years in some situations. Vendor should use acceptable best industry practice to purge data.
22	7.14 number 13 Page 24	Are only project implementation-related documents and records subject to the 5-year post-final payment retention requirement or is any data stored in the grants management system also required to be retained for that period after the contract is concluded?	All data is required to be retained for the period after the contract is concluded.
23	5.2 Page 19	Is there a need for offline or external backup exports of grant-related documentation?	As part of operational needs, no. Your disaster recovery/continuity of operations plans should account for how you will backup and recover the system and its data, should there be a need to do so.

24	3.5.6 Page 10	How robust does the undo functionality need to be (e.g., soft deletes, version histories, rollback by user or admin)?	Soft deletes would meet DCR's business needs. Simple rollback can be implemented by user.
25	3.5.7 Page 11	What kinds of form edits or access changes does the State anticipate needing frequently?	The State expects needing to edit forms once or twice per month. The State expects needing to modify access more frequently based on grantee staffing changes.
26	3.5.7 Page 11	How often will the vendor or DCR staff need to create new programs, forms, or workflows?	There are only five planned programs, and we do not anticipate needing to add more. DCR staff may need to create new forms or workflows throughout the life cycle of the grant. While it's difficult to predict the frequency, we anticipate forms and workflows could change on a monthly basis.
27	3.5.7 Page 13	Are there anticipated exceptions to role-based permissions requiring custom logic (e.g., temporary elevation or context-based access)?	No.
28	3.5.7 Page 13	Does the State have the ability to restrict data access by tags for privacy and program separation? In other words, should some users not even be able to see grants and data being worked on by other users outside of their group, program, or division?	Yes, the State has the ability to restrict access. User access to programs will be defined by the State.
29	3.5.7 Page 14	What level of cross-program reporting does the State envision (e.g., grants by geography, source of funds, time period)?	Some cross-program reporting query types might include (but are not limited to): -geography -funding source -program -grant -allocation amount -amount obligated/expended -time period -contact person

			-demographic attributes -type of recipient (individual, locality, business, etc.) -Project status
30	3.5.7 Page 15	Does the State expect vendors to provide reusable automated test cases/scripts or just provide documentation?	Documentation is required. Automated test cases/scripts for load testing.
31	2.3 <i>No page number provided by Vendor.</i>	Can the team share any diagrams or organizational structures as it relates to the grant program?	These structures are still under development. See Question #2 for program information.
32	2.3 <i>No page number provided by Vendor.</i>	Has the team mapped all of the critical grant processes for each program?	No, these processes are still under development.
33	3.5.7 Page 13	Does the State prefer a hard-coded system that needs to be customized by vendors or consultants, or no no-code system that can be administered by State agency staff?	Prefer no-code system that can be administered by State Agency staff. But the system should provide back-end interface and flexibility to allow DCR staff to customize and modify things (such as adding fields, update labels, building customized reports, etc.)
34	3.5.7 <i>No page number provided by Vendor.</i>	What document management software does our GMS need to integrate with? If the GMS can store and manage documents will that meet the need as well?	The GMS should store and manage the documents. DCR does use DocuSign and SharePoint but would prefer the documents be preserved in the grants management system.
35	3.5.7 Page 10	Does the entire system need to be accessible to low/no-vision users internally, or only the grantee portal/external experience?	The entire system should be accessible.
36	3.5.7 Page 18	"Collaborate with the State to deliver the Deployment Plan during the Execute and Build stage of the project." - What State resources will be available to take part in this collaboration?	The entire staff of the Division of Community Revitalization as well as the Department of Commerce IT will be available to take part in this collaboration.

37	3.5.76 Page 16	Will the State require sandbox or staging environments after program closeout to review archived data?	No. There is no need to keep sandbox or staging environments after program closeout.
38	TC-8 Page 10	Insurance - As a vendor, we currently carry cyber liability insurance with limits of \$1M per occurrence and \$5M in aggregate. While we do not have a standalone commercial crime policy, we do maintain other relevant insurance coverage. Given this, would our current insurance be sufficient to meet your bid requirements? If not, would we be permitted to secure additional coverage upon vendor selection, or would these limitations disqualify us from participating in the bidding process?	Proof of current level of insurance at the time of bid, with a commitment to increase to the required amounts upon award, will be sufficient for participating in the bidding process.
39	3.5.7 Page 15	Training: How many different user groups need training (e.g., State program staff, auditors, grantees, finance)? Can you give examples of "vendors" that may need training, and why?  Is live training preferred, or will asynchronous modules (videos, guided demos) suffice?	The groups likely require training are state program staff, auditors, and grantees. The only vendors that may need training would be those that work for the grantees (e.g., local governments and non-profits) since some grantees may use vendors to help them manage their grants.  A mix of live training and asynchronous modules is preferred.
40	3.5.7 <i>No page number provided by Vendor.</i>	Support: Technical support required for applicants and internal staff. Is Live phone support required?	Live phone support does not have to be first communication method. But the vendor should provide this option if other communication methods did not address/fix issues in a timely manner.
41	4 AVA 1 Page 11	Are response targets sufficient for the SLAs, or are they required to include resolution targets as well? If resolution targets are	Resolution targets are required and should be outlined for each severity level.

		required, can the resolution targets be explicit for just Critical issues?	
42	<i>No Section or page number provided by Vendor.</i>	The RFP mentioned implementing a system as quickly as possible and provided a 4-month full implementation timeline. Is a phased approach or an incremental rollout of the most needed functionalities of the system for the first 4 months acceptable to NC Commerce? Or would NC Commerce consider extending the 4-month full implementation expectations to better accommodate the amount of configuration and integrations that will be required?	The State would be willing to work with the vendor on a phased approach but would require that the system would be operational within four months to begin taking applications for the programs that are described in the State's CDBG-DR Action Plan (see <a href="http://www.commercerecovery.nc.gov">www.commercerecovery.nc.gov</a> and Question #2).
43	3.2.1 Solutions not Hosted on State Infrastructure, Page 7	The system is compliant with most NIST specifications, and a mapping can be provided. Would this suffice? The system is also compliant with SOC 1, SOC 2 Type II, SOC 2 + HITRUST mapping and certified in ISO 27001.	A vendor must meet the state's security requirements. The state will review and approve the security architecture prior to contract award
44	3.5.7 1 System Interface, Page 10	Are any other integrations required other than specified?	No.
45	Excel UTF-8 Attachment D_Cost form	How many internal staff will access the system more than 40 hours per month, and how many will access the system less than 40 hours per month?  How many external users e.g. applicants and reviewers will access the system per month? Would external users access the system year-round or only during specific times in the year? Please specify for each group of external users (e.g. applicants, reviewers).	The State anticipates that a total of 60 staff will access the system; approximately half will access the system more than 40 hours per month and half less than.  For external users, they would access the system year-round, but access would likely peak during the application periods and monthly reporting periods. The State anticipates having approximately 1,500 grantees (who would be external users), and they could have 1-3

			concurrent users each (1,500 – 4,500).
46	<i>No Reference Citation provided by Vendor.</i>	What is the expected budget?	The State of NC does not have an expected budget for this system.
47	<i>No Reference Citation provided by Vendor.</i>	How many grant programs expect to be implemented?	See Question #2 above.
48	<i>No Reference Citation provided by Vendor.</i>	What are the data migration requirements, current associated data sources, and expected data size (gigabytes)?	This is a new system/program. There won't be much existing data/legacy data to migrate by the time the new system is implemented. If there are data, DCR would keep them in Excel format. The expected data size would be small (likely less than 1 gigabytes).
49	<i>No Reference Citation provided by Vendor.</i>	What type and number of Microsoft licenses are currently held by the Department of Commerce and any stakeholders related to this solicitation?	The vendor should outline any third-party software and costs needed for licensing of those products for Commerce employees and stakeholders.
50	<i>No Reference Citation provided by Vendor.</i>	What North Carolina technical and business experts will be available to assist with requirements gathering and use cases to help speed development to meet the narrow four-month implementation timeline?	These include Commerce IT staff and DCR business expert staff.
51	<i>No Reference Citation provided by Vendor.</i>	How many documents and reports are currently in use and are there any additional requirements to be developed? The number of documents, reports, options, and additional features may affect the four-month implementation time.	This is a new division and new program. There are no documents or reports currently in use. All of those requirements are currently under development. See Question #2 for an overview of the programs.
52	<i>No Reference Citation provided by Vendor.</i>	How is payment processing (submission, tracking, reconciliation, and reporting of payments, including alignment with program-specific requirements) currently managed?	Invoices are submitted to the Finance department after being reviewed and approved by the manager directly involved with the specific program/activity. This allows for the review for allowability based on CDBG-DR requirements, in addition to

			<p>individual grant agreement, by those with direct involvement.</p> <p>The finance department staff will review the submission for proper approval and prepare documentation to ensure proper coding. Once prepared, the coding sheet is reviewed by the finance director before being sent to DOC accounts payable (AP) who key it in into NCFS for payment.</p> <p>As payments are sent to DOC AP, they are logged by DCR Finance for tracking. On a weekly basis, Finance will generate NCFS payment reports to ensure payments are processed timely and accurately.</p> <p>Payments will be formatted in a manner to assist with quarterly federal reporting requirements of the CDBG-DR program.</p> <p>Monthly reconciliations of data will be performed.</p>
53	<i>No Reference Citation provided by Vendor.</i>	Can you please provide details on the number and type of work and workflows that are currently performed with manual operations that need to be converted to automated systems within the solution?	This is a new division, so there are not any existing workflows.
54	<i>No Reference Citation provided by Vendor.</i>	Do you currently have any established custom KPIs, and program-level analytics? If so, please describe.	No.
55	<i>No Reference Citation provided by Vendor.</i>	What type and number of external stakeholders, grantees, auditors, reviewers, or customers may need to access some or all	See response to Question #45.

		of the system's information via the public or private web portal?	
56	<i>No Reference Citation provided by Vendor.</i>	The solicitation refers to a "disaster recovery expert vendor." Have there been any incidents that might need to be addressed in the security design of the proposed solution?	No, the term "disaster recovery" refers to the nature of the funding (CDBG-DR) and the programs (disaster recovery related grants) that will be administered using this grants management solution.
57	<i>No Reference Citation provided by Vendor.</i>	If any additional functionality needed to successfully implement the system (or desired by North Carolina staff, users, leadership, or stakeholders) is identified during the initial information-gathering phase, is North Carolina open to extending the four-month implementation period to ensure the program's success.	Yes.
58	Attachment D – Cost form: Application Enhancements	Can the State provide its anticipated volume or frequency of application enhancement requests per year?	Semi-annually or annually. Semi-annually in early stage of program. Annually in later stage of program.
59	3.5 – Business and Technical Specifications, Page 9	Will the State assign Subject Matter Experts (SMEs) to participate in configuration and requirements sessions?	Yes.
60	<i>No Reference Citation provided by Vendor.</i>	could you describe the number of internal state users? could you also describe their roles?	DCR is still in the process of hiring staff, but we anticipate having as many as 60 internal users. Their roles include grants management, financial management and compliance, policy, legal, and outreach.
61	<i>No Reference Citation provided by Vendor.</i>	could you describe the number of the external users? and could you describe their roles? (users that would access solution through portal)	See response to Question #45.
62	<i>No Reference Citation provided by Vendor.</i>	can the service provider negotiate the user license agreement and service level agreement?	Vendor should present its license or support agreements in its offer for review and evaluation. Terms

			<p>offered for licensing and support of Vendors' proprietary assets will be considered. The State shall not be obligated under any condition to negotiate terms and conditions that do not comport with our General Statutes or the State's terms and conditions of this RFP. These Agreements may be negotiated but can not materially change the terms and conditions of the Agreement. See Section 7.4 of the RFP for additional information.</p>
63	General	Are there any restrictions to the use of hyperlinks in the response?	Hyperlinks to information is not acceptable.
64	7.2 Financial Statements, Page 27	Would a D&B report be a suitable alternative to providing an audited financial report for privately held companies? If not, what alternatives are acceptable through subsection C?	No. The State is not accepting other evidence of financial stability pursuant to subsection 7.2(c) for this RFP. Privately held companies must submit one of the two alternatives identified in subsection 7.2(b), along with Attachment G.
65	Attachment D: Cost Form	The cost form explicitly says to not make any alterations to the existing formatting. It also requests vendors to itemize their costs, however, does not provide a spot to do so. Please provide guidance on how to itemize whether it's through an appended document to the cost form and/or an updated cost form.	See response to Question #7.
66	2.2 Purpose of the RFP, Page 5	Does NCDOC <sup>2</sup> prefer to procure a net new solution or prefer to utilize an extension of a current system/footprint in place that can meet your needs?	DCR is a new division and does not have a current system in place.

<sup>2</sup> North Carolina Department of Commerce.

67	<i>No Reference Citation provided by Vendor.</i>	Would the State be willing to extend the due date of May 29th?	No, we are under a tight timeline to get disaster recovery programs rolled out to Western NC and we need to move quickly.
68	<i>No Reference Citation provided by Vendor.</i>	Have you had demonstrations and/or conversations with grants management vendors? If so, with whom?	No.
69	<i>No Reference Citation provided by Vendor.</i>	Can you please provide the State's number of unique sub-recipient organizations?	See response to Question #45.
70	<i>No Reference Citation provided by Vendor.</i>	What is the anticipated number of internal users and external users?	See response to Question #45.
71	<i>No Reference Citation provided by Vendor.</i>	Can you please provide the State's average annual grant revenue?	The State of NC was allocated \$1.4 billion in CDBG-DR funds by the US Congress through the US Department of Housing and Urban Development (HUD). These funds have not yet been received by the State; however, they are expected to be spent within 6 years. The use of funds is outlined in the State's Action Plan which has been approved by HUD.
72	<i>No Reference Citation provided by Vendor.</i>	Please provide a list of systems currently housing on-going/historical grant information and for each please provide the data schemas and approximate number of records to be extracted, transformed, and loaded into the system.	DCR is a new division and does not have historical grant information. NCORR, which is DCR's predecessor, does have grants information in Salesforce, but DCR does not anticipate integrating that data into this system.
73	<i>No Reference Citation provided by Vendor.</i>	Would the State be amenable to having all applications and current awards running by the end-of-the-year with post-award management functionality being implemented in January and February?	No. The State needs to make awards for the programs described in question 2 in the late summer and early fall of 2025. 2026 would be too late.

74	<p>Section 15 Project Management, Page 17-19</p> <p>7.3 Page 28</p> <p>7.10 Page 30</p>	<p>Given that our company supports clients through a team-based approach rather than assigning a single Project Manager, would the State be open to a model where a dedicated team provides project management, client success, and implementation support in lieu of a single Vendor Project Manager?</p>	Yes.
75	<p>Payment Terms - Attachment B, Section 10, Page 39</p>	<p>Our standard commercial terms require annual, upfront subscription payments. Would the State consider modifying the payment terms to allow for annual invoicing for subscription services, rather than monthly payments tied to milestones?</p>	<p>The development/ implementation payments need to be based on contracted predetermined deliverables/milestones.</p>
76	<p>Insurance Requirements - Attachment B, Section 16, Pages 40-41</p>	<p>We do not own company vehicles. Can the State confirm whether the automobile liability insurance requirement still applies in this case, or can this requirement be waived?</p>	<p>This requirement cannot be waived. The automobile liability insurance requirement also covers non-owned and hired vehicles.</p>
77	<p>Confidential Information - Attachment B, Section 18 Page 41-42</p>	<p>Our company considers pricing details (breakdown) to be confidential information, as it reflects proprietary strategy and customer-specific terms. Would the State consider allowing pricing details to be marked confidential in accordance with the definition of trade secrets under N.C.G.S. §66-152 (this request does not include a request to aggregate pricing to be considered confidential)?</p>	<p>No. Prices submitted in response to a solicitation may not be deemed confidential, pursuant to 09 NCAC 06B .1001. Any prices submitted would be considered public information.</p>
78	<p>3.5 Business and Technical Specifications, Page 9</p>	<p>Reference: Describe how you will maintain system access and functionality—including documents and reports—for at least five (5) years after program closeout.</p> <p>Question: Will a separate contract be issued for operations and maintenance support to</p>	<p>No. Under federal law, DCR is required to maintain records for audit purposes for 5 years after the end of the grant. We want the records to be maintained but are not requiring full functionality after the grant has closed.</p>

		maintain system access and functionality for five years after program closeout? Can you please elaborate on the intent of this requirement.	
79	2.1 Introduction Page 4	Please clarify whether the four (4) month implementation period includes user training, UAT, and data migration, or if it ends at technical go live.	We would anticipate user training would go beyond four-month implementation period. There will be little to no data migration.
80	2.1 Introduction Page 4	Would DCR consider a phased implementation (e.g., core modules first) within the 4-month window?	The State would be willing to work with the vendor on a phased approach but would require that the system would be operational within four months to begin taking applications for the programs that are described in the State's CDBG-DR Action Plan (see <a href="http://www.commercerecovery.nc.gov">www.commercerecovery.nc.gov</a> and Question #2).
81	2.2 Purpose of the RFP and Agency Background Page 5	While SaaS is preferred, would a PaaS or hybrid solution be equally acceptable if it meets all technical and compliance requirements?	A Software as a Service (SaaS) model is preferred, though other approaches will be considered if they meet DCR's functional and technical requirements.
82	2.3 Summary of Problem Statement Page 5	Is there an incumbent vendor currently providing grant management support, and if so, what platform or firm is in use?	No. DCR is a new division and is purchasing a new system. As noted in earlier questions, DCR has selected HORNE as the single-family housing implementation vendor, and they will use CANOPY™ for that program.
83	5.2 Evaluation Criteria Page 20	Can you share the relative scoring weights for the four evaluation criteria categories?	There is no numerical scoring. Criteria are listed in the RFP by order of importance.
84	3.2.1 SOLUTIONS NOT HOSTED ON STATE INFRASTRUCTURE	Can offshore resources be used for configuration and	Any offshore resources must be disclosed and evaluated by NCDIT.

	Page 7	development if they do not access State data or systems?	See Section 7.1 of the RFP and Attachment F.
85	3.2.1 SOLUTIONS NOT HOSTED ON STATE INFRASTRUCTURE Page 7	If the platform uses cloud services, must all data physically reside in U.S.-based data centers?	Yes.
86	3.2.1 SOLUTIONS NOT HOSTED ON STATE INFRASTRUCTURE Page 7	Is FedRAMP Moderate authorization required or preferred for SaaS solutions handling CDBG-DR data?	A vendor must submit a Vendor Readiness Assessment Report-VRAR and one (1) of the preferred third-party security assessments prior to contract award. Preferred third-party assessments are listed in Section 3.2(b)(i). The State must review and approve the VRAR and third-party assessment prior to entering into a contract.
87	3.2.1 SOLUTIONS NOT HOSTED ON STATE INFRASTRUCTURE Page 7	Is the Vendor Readiness Assessment Report (VRAR) mandatory at proposal submission or only upon request?	The VRAR is not mandatory at proposal but is encouraged. A vendor must submit a Vendor Readiness Assessment Report-VRAR and one (1) of the preferred third-party security assessments prior to contract award. Preferred third-party assessments are listed in Section 3.2(b)(i). The State must review and approve the VRAR and third-party assessment prior to entering into a contract.
88	3.3.3 IDENTITY AND ACCESS MANAGEMENT Page 8	Is integration with the NC identity management system (e.g., Azure AD, NCID) required for internal users?	Integration with NC identity management system is preferred. An alternate solution requires an exception request and approval by the State CIO.
89	3.3.6 Data Migration Page 8	Can the State clarify expectations around the timing, frequency, and formats required for legacy data migration into the new system?	Not at this time. It may be that no existing data is migrated into the system. A general response regarding the vendor's

			capabilities in this regard will be sufficient.
90	3.5.7 SYSTEM INTERFACE / INT-1 Page 10	What specific APIs or data protocols does NCFS use? Will the State provide technical documentation and access?	<p>Oracle ERP Cloud Service provides below methods for <b>outbound</b> interfaces:</p> <ul style="list-style-type: none"> <li>– BI Report Approach</li> <li>– Web Services Approach</li> <li>– Hybrid—Web Services along with BI Report Approach</li> </ul> <p>Oracle Cloud Service provides multiple options to retrieve data from the underlying SaaS database and share it with the external system. The following are the different data sets that can be used in Cloud-based outbound interfaces for various use cases:</p> <ul style="list-style-type: none"> <li>– Outbound Cloud data, which requires data manipulation based on third-party systems</li> <li>– Outbound Cloud data, which requires complex data validation and transformation prior to sending the data to target SFTP Server</li> <li>– Outbound Cloud data, which would be directly sent to third-party system with no transformation or with very little transformation</li> </ul>
91	3.5.7 SYSTEM INTERFACE / INT-4 Page 10	Please clarify the expectations around integration with tools like Tableau, Power BI, Adobe, and Smartsheet—are these read-only or bidirectional?	Read-only Unidirectional integration (from grant management system to these tools) with tools like Tableau, Power BI, Adobe, and Smartsheet would suffice.
92	3.5.7 REPORTING / RPT-1 Page 14	Are there specific formats or systems (e.g., DRGR) that the platform must integrate with for HUD compliance?	The system will not need to integrate with DRGR for HUD compliance. The desired GMS would ideally generate reports and data in formats that are easily transferable to DRGR.

93	3.5.7 AUDITING / AUD-1 Page 14	What are the audit retention requirements beyond the 5-year federal minimum?	Records must be kept one year beyond the federal minimum (six years total).
94	3.5 Business and Technical Specifications Page 9	Can you provide anticipated volume of users, grantees, applications, and payments per month/year?	Payments will fluctuate throughout the program. We estimated between 1500-4500 users at any given time, but the activity flow will fluctuate based on need. (See response to Question #45 for additional information).
95	3.5 Business and Technical Specifications Page 10	Is support for Spanish or other languages required for applicant-facing interfaces?	Support for other languages would be a plus but is not required. Most language access needs will be from ultimate beneficiaries of these programs rather than the anticipated grantees using this system.
96	3.5 Business and Technical Specifications Page 10	Is a named user model required, or will concurrent or tiered access suffice?	A named user is required since DCR would like to track who did what in the system.
97	3.5 Business and Technical Specifications Page 10	Are any offline/mobile capabilities needed for field staff or applicant use?	Mobile capabilities would be needed. Offline capabilities would be desired but not required.
98	3.5.7 - SYSTEM INTERFACE / INT-1(a) Page 10	Will the State provide integration documentation or sandbox environments for NCFs during development?	Full integration is not required. Regular interfaces will be required.
99	3.5.7 – SYSTEM INTERFACE / INT-1(b) Page 10	What is the current Document Management System in use (e.g., SharePoint, Laserfiche)? Must integration be real-time?	SharePoint. Full integration is not required. Regular interfaces will be required.
100	4.2 Payment Schedule Page 19	Will the State accept milestone-based invoicing aligned to deliverable acceptance?	Yes. Milestone-based invoicing aligned to deliverable acceptance is accepted.
101	4.1 Offer Cost Page 19	Can vendors propose enhancement packages beyond the base scope in Attachment D's optional section?	This is welcome.
102	3.5.7 TESTING / TST-6 Page 15	Will the State provide its own UAT and SIT test environments,	The vender is expected to host the test environment.

		or is the vendor expected to host all testing environments?	
103	3.5.7 TRANSITION / TR-2 Page 16	Are vendors expected to maintain a sandbox environment or only deliver exported data during offboarding?	Vendors are expected to maintain a sandbox environment during the transition-out plan period.  It is expected that anytime the vendor is making changes to the system, they should have a separation between dev/test/prod. Vendor develops the code/functionality, DCR staff test it, then vendor moves it to production.
104	3.5.7 TRAINING Page 16	Does the State require live instructor-led training or is asynchronous training (videos, LMS modules) sufficient for end users and administrators?	A mix of live instructor-led training and asynchronous modules is preferred.
105	3.5.7 PROJECT MANAGEMENT / PMO-7 Page 17	Are there any minimum in-person meeting or staffing requirements for project kick-off or delivery milestones?	Minimum 2 dedicated staff from vendor for project kick-off and delivery milestones. They should have full knowledge and skillset to be on or to take the roles of PM, Technical Lead and Senior Business Analysts. Vendor should expect at least 1 whole day in-person meeting during those events if needed.
106	3.5.7 PROJECT MANAGEMENT / PMO-11 Page 17	Can you confirm if vendors are required to use the State's project templates or if custom project plans are acceptable?	Vendor is not required to use State's project templates.
107	6.1.19 GENERAL INSTRUCTIONS FOR OFFER Page 25	Should resumes for key personnel be included in the main proposal PDF or uploaded separately in Ariba?	This is a requirement of the RFP. Resumes must be included in the PDF.
108	6.1.19 GENERAL INSTRUCTIONS FOR OFFER Page 25	Could the agency please provide an itemized list of all elements for a fully compliant proposal in sequential order?	No. Please refer to the RFP.
109	<i>No Reference Citation provided by Vendor.</i>	We understand that tracking, managing, and reporting on grants is the priority. Is DCR looking for support around other elements of the grant	No. Other support may be requested using future RFPs.

		management lifecycle (e.g., identifying potential grantees and supporting them in applying for funding, scoring applications, scenario planning around different portfolios of applications)?	
110	<i>No Reference Citation provided by Vendor.</i>	Which of the 20+ core capabilities listed in the business and technical specifications are must-haves for Day 1 vs. may be phased post-implementation? Any additional sophistications to be planned for post 4-month implementation either for the 20+ identified core capabilities or beyond those?	See response to Question #42.
111	<i>No Reference Citation provided by Vendor.</i>	What is the expected volume and complexity of historical data that needs to be migrated into the new system?	See response to Questions #14 and #89.
112	<i>No Reference Citation provided by Vendor.</i>	How will grantee-side users' access and interact with the system? Are public, no-login interfaces expected, or will all access be authenticated?	All access should be authenticated.
113	<i>No Reference Citation provided by Vendor.</i>	What types of payment models does DCR intend to use, and how will they vary across programs? What type of payment processing are you expecting the solution to cover?	DCR plans to finalize payments out of NCFS based on approved payments from the GMS <sup>3</sup> that interface with the NCFS AP module. The GMS will allow for invoice (including supporting documentation) upload, an approval workflow, and an interface with NCFS to initiate payment.
114	<i>No Reference Citation provided by Vendor.</i>	What solution or management tool is DCR currently using for document management and enterprise data solutions?	DCR is currently using SharePoint to store and manage documents. It is not currently using an enterprise solution.

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<sup>3</sup> Grant Management System

115	<i>No Reference Citation provided by Vendor.</i>	Can you describe which aspects of a SaaS model drive the departments preference for that approach?	We would not have the bandwidth to use an alternative system.
116	Attachment D: Cost Form	In ATTACHMENT D: COST FORM, you request a cost for "Software Licenses: 150 concurrent users" - Can the government please itemize the 150 users based on internal vs. external users? (e.g. NCDOC vs. grantees)	See response to Question #45.
117	<i>No Reference Citation provided by Vendor.</i>	During the pre-bid conference, it was mentioned that a previous RFP had been awarded to an "implementor." Could you please clarify the relationship between that implementor and the software product being solicited through this RFP? Is the intention that the awarded vendor from this solicitation will work with that implementor?	<p>Yes, as noted in Question #2, DCR is implementing 5 programs consistent with our approved CDBG-DR Action Plan. One of these programs, the single-family housing rehabilitation and reconstruction program, is going to be implemented by HORNE. HORNE will use the CANOPY™ system to collect data from individuals and manage that program.</p> <p>The other four grant programs will use this system for applications and grants management. The awarded vendor from this solicitation should be prepared to work with HORNE to incorporate their records from CANOPY™ into this system.</p>
118	<i>No Reference Citation provided by Vendor.</i>	Does NCDOC have a budget or not to exceed total for this contract they can share with vendors?	No.
119	2.0 Purpose of RFP, Page 4	How does the State of North Carolina Department of Commerce (NCDOC) plan to fund this project? Is it part of the operating budget or capital budget?	CDBG-DR will be the primary funder for this project.

120	2.0 Purpose of RFP, Page 4	Does NCDOC have an approved budget for this new Grants Management System (GMS)? If yes, can you provide that budget information to guide vendor bidding decision-making? If the budget is too low, it does not support bid preparation.	No. See above.
121	2.0 Purpose of RFP, Page 4	Has NCDOC previously entertained any system demonstrations and/or presentations from vendors? If so, which systems were seen and when?	No.
122	2.0 Purpose of RFP, Page 4	Did NCDOC utilize any vendor / SME consultants in defining the sought-after functionality and/or scope of work enumerated in the RFP? If yes, please provide the name of the vendor/consultant.	No.
123	2.0 Purpose of RFP, Page 5	How does NCDOC manage its grants today? If vendor-provided solution is deployed, which vendor provided it to NCDOC?	Internally.
124	2.0 Purpose of RFP, Page 5	Given the requirement to manage Federal funds, does NCDOC require vendors with experience deploying GMS at the Federal level?	No.
125	2.0 Purpose of RFP, Page 5	Can you provide the annual dollar amount of grant funding you receive for the current fiscal year?	No.
126	3.3.4 Integration Approach Page 8	Please provide the current modules that are implemented within the NCFS? Also, can you provide the expectation for the type of integration required, e.g., web services, file-based, one-way, or bi-directional data flow?	NCFS contains a multitude of modules. The most applicable will be the Accounts Payable Module which will initiate payment of invoices.  File-based, one-way from GMS to NCFS data flow is expected. The data (multiple payment requests transactions) would be batched together and be

			<p>interfaced/implemented daily with NCFs system.</p> <p>Also, the GMS will interface regularly with the implementation vendor's CANOPY™ system.</p>
127	3.3.6 Data Migration Page 8	<p>Can you provide an estimate of the volume of data to be converted and migrated into the new GMS?</p> <p>What is the current format of this grant data? Please provide an example row of data and/or database schema.</p>	Please refer to Questions #14 and #89 above.
128	3.5.7 3. Technical Specifications TC-8 Page 11	Would you be open to a revision of the Cyber Liability Insurance coverage amount, specifically reducing it from \$10,000,000 per claim to \$2,000,000, considering the scope of the proposed services?	No.
129	14. SUPPORT SUP-1 Page 16	<p>“Provide technical support to applicants that mimics the office hours of the intake centers, 8:00 – 17:00 EST Monday – Friday.”</p> <p>Is the requirement that the vendor provide direct technical support to applicants, or that the vendor provide support to the internal NCDOC help desk?</p>	It would be desired that the vendor provides technical support via online meeting which allows applicants and DCR staff on-board at the same time.
130	Pre-Proposal Conference	<p>As stated in the Pre-proposal conference, the count of users expected to use the GMS are:</p> <ul style="list-style-type: none"> <li>• Internal users: 30 to 35</li> <li>• External users: 2500</li> <li>• Applicants: 10000</li> </ul> <p>Kindly confirm the same.</p> <p>In addition, how many of the 30-35 internal NCDOC users will use the system less than 20 hours per month?</p>	Please see response to Question #45.
131	Pre-Proposal Conference	As stated in the pre-proposal conference, does NCDOC	This RFP is for the Division of Community Revitalization within

		<p>currently manage four to five grant programs? If possible, please provide a list.</p> <p>Do the business processes (application, pre-award, award, etc.) and associated forms vary with each type of program or are all processes and forms standardized?</p> <p>When do each program's application periods begin in a given fiscal year?</p>	<p>the NC Department of Commerce (NCDOC). DCR will use the grants management system to manage the CDBG-DR dollars that were allocated to NC for Hurricane Helene. This allocation has been broken down into five programs that DCR will manage (see Question #2). Four of the five programs will use this grants management system, and their business processes will be similar, but will likely differ from each other. DCR anticipates application periods to begin the late summer 2025 for multi-family housing and fall for the other three programs (infrastructure, economic revitalization, and workforce housing).</p>
132	Pre-Proposal Conference	<p>Can the NCDOC confirm which systems the new GMS must integrate with –</p> <ul style="list-style-type: none"> <li>a) North Carolina Financial System (NCFS)</li> <li>b) Please list other specific systems including Name and version.</li> </ul>	<p>Currently it is desired to not have any system fully integrate with the GMS, rather the GMS should be able to interface with the NCFS and the implementation vendor system, which is CANOPY™. CANOPY™ is a proprietary solution developed by HORNE Federal to respond to federal and state programs to track and monitor funding streams.</p>
133	2.6 Contract Type Page 6	<p>Can DCR confirm the anticipated budget or not-to-exceed amount for this engagement?</p>	No.
134	2.6 Contract Type Page 6	<p>Will the State specify the specific contract type for this work? Firm-fixed price (equal monthly payments) or time and materials (based on deliverables and hours worked)?</p>	See response to Question #75.

135	3.1 General Requirements and Specifications Page 6	Will the State of NC allow the offeror to propose additional terms in its proposal or add assumptions to clarify content?	Yes. Additional terms and assumptions will be considered errata and exceptions. Please follow the instructions in Section 6.1.12 of the RFP – Vendor Errata and Exceptions.
136	3.1 General Requirements and Specifications Page 6	Is the proposal format one in which pricing is included in the proposal submission volume?	No.
137	3.5.7 1. System Interface INT-1 Page 10	Can DCR clarify which document management platform/software is currently in use (e.g., Box, SharePoint, Dropbox Business)? Additionally, how is Adobe software presently used within DCR's grant management process (e.g., for e-signatures, form generation), and should integration with Adobe tools be assumed as part of this system's scope?	DCR uses SharePoint for document management. Adobe software would be used to incorporate the data in DCR's grant management system for form and PDF report generation. The forms and reports can be run in batch mode.
138	3.5.7 1. System Interface INT-1 Page 10	The RFP references an "Awarded Implementation Vendor" and a separate solicitation titled Implementation of Helene Recovery Programs for Housing. Can DCR confirm whether this vendor will provide the core applicant-facing platform for the Reconstruction and Rehabilitation (R&R) for Owner-Occupied Units Program? What technology platform (e.g., Salesforce, Dynamics, proprietary system) is being used or developed by the awarded vendor, and what role will that system play in the broader architecture?	Yes, as noted in question 2, DCR is implementing 5 programs consistent with our approved CDBG-DR Action Plan. One of these programs, the single-family housing rehabilitation and reconstruction program, is going to be implemented by HORNE. HORNE will use the  CANOPY™ system to collect data from individuals and manage that program.  The other four grant programs will use this system for applications and grants management. The awarded vendor from this solicitation should be prepared to work with HORNE to incorporate their records from CANOPY™ into this system.

139	3.5.7 1. System Interface INT-1 Page 10	Under “commonly used enterprise database software,” can DCR specify whether this refers to on-premises systems (e.g., SQL Server, Oracle) managed by DCR, or cloud-based databases leveraged by the Awarded Implementation Vendor or other external partners? What data architecture or storage model should vendors anticipate interfacing with?	It could be either on-premises or cloud-based databases. Vendor should anticipate interfacing with Oracle or MS SQL server enterprise database. DCR would use relational database management systems model for enterprise database solution.
140	3.5.7 1. System Interface INT-4 Page 10	Can DCR confirm whether it expects real-time, bidirectional integration with the systems listed in INT-1, or if batch-based or unidirectional data exchanges are acceptable depending on the target system? Additionally, are vendors required to provide prebuilt connectors for these systems, or can integration be proposed via standard APIs and middleware?	Real-time, bidirectional integration with the systems would be desirable. Batch-based or unidirectional data exchanges are acceptable depending on the target system. Integration may be proposed via standard APIs and middleware.
141	3.5.7 2. User Interface UI-5 Page 11	Can DCR clarify how many programs and funding sources are expected to be supported in the initial configuration required in the 4-month implementation from contract award?	See response to Question #2.
142	3.5.7 3. Technical Specifications TC-1 Page 11	The Cost Form references 150 concurrent users but does not indicate the total number of users by role. Can DCR clarify the anticipated total number of system users, including DCR staff, vendors, auditors, subrecipients, and applicants? Additionally, should vendors assume that licenses for applicant accounts and records for the R&R program will be addressed separately in the Implementation Solicitation?	See response to Question #45.
143	3.5.7 3. Technical Specifications TC-2 Page 11	Can DCR confirm whether there are preferred or existing standards (e.g., NIEM, XML, JSON, HL7) in use for data exchange? Should vendors	See response to Question #98.

		assume integration with any existing data pipelines or middleware?	
144	3.5.7 3. Technical Specifications TC-5 Page 11	DCR's Cost Form references 150 concurrent users but does not specify the total number of named users across all roles. Can DCR clarify the anticipated total user base, including DCR staff, subrecipients, vendors, auditors, and applicants, to ensure appropriate licensing and access configuration are accurately scoped?	See response to Question #45.
145	3.5.7 3. Technical Specifications TC-6 Page 11	Can DCR clarify what constitutes "critical program outcomes" and the specific metrics or data elements required for near real-time reporting? Would these be aligned with the HUD QPR metrics?	Yes, HUD QPR metrics would constitute a portion of critical program outcomes. Other data elements of concern might include performance, financial, or other tracking data that is supplemental to the HUD QPR metrics. A comprehensive list of required data elements has yet to be established as it is dependent upon evolving state and federal requirements.
146	3.5.7 5. Core Functionality COR-6 – COR-9 Page 12, 13	COR-6 through COR-9 collectively reference the use of forms, templates, digital signatures, and outbound correspondence (print, mail, email, text). Can DCR clarify whether the expectation is for a fully integrated communication management system with dynamic templates, signature workflows (e.g., Adobe Sign), automated messaging based on status changes, and correspondence audit history?	Yes. The expectation is a fully integrated communication management system with dynamic templates, signature workflows, automated messaging, etc. Static templates/forms (or require manual processing/intervention) would be accepted if they are less used.
147	3.5.7 5. Core Functionality COR-12 Page 13	COR-12 references an application dashboard for "applicants." Can DCR clarify whether this refers specifically to applicants under the Reconstruction and Rehabilitation (R&R) Program for	This would be all applications for programs maintained in the GMS.

		Owner-Occupied Units, or which programs with applicants are included in this engagement?	
148	3.5.7 5. Core Functionality COR-20 Page 13	Should the system support mid-implementation budget adjustments and additional data collection at the project/case level, program level, or grant level—or across all three?	Yes, to all questions.
149	3.5.7 6. Administrative Functions ADM-3 Page 13	To confirm scope and modular architecture—should vendors assume the system will include one central financial management module that supports all grant programs, and separate case/application management modules for each non-R&R program (e.g., WHO, MCR, CI, CDR), totaling five modules overall? Additionally, can DCR confirm that the R&R program case management module will be addressed separately under the Implementation Solicitation and is not part of this current engagement?	Vendors should describe how the system will manage data at the various levels including at the federal award, individual programs, projects and activities level.  The implementation vendor's system will handle the case management outside of this system. Data from the implementation vendor system will interface into the GMS.
150	3.5.7 7. Financial Management FIN-7 Page 14	Can DCR describe the bill payment report's required format and data elements?	Bill payment reports will need to be aligned with CDBG-DR requirements and state requirements.
151	3.5.7 7. Financial Management FIN-8 Page 14	Does DCR anticipate that returned or missing check scenarios may be initiated by either NCFs or the awarded grants management system? Should vendors design the system to both receive returned payment data from NCFs and initiate internal workflows based on that data (e.g., resubmission, flagging, or case-level adjustments)? Additionally, when is manual entry expected, and should it serve as a backup to automated data sync?	Returns will be manually entered in the GMS. Coordination with NCFs/CANOPY™ will be one-directional and should not anticipate them communicating back to the GMS. Missing check scenarios will be handled based on State guidelines and could require the payment to be cancelled in the GMS and reissued.  Manual entries will be required for returns, corrections, uploading documentation and payments

			made prior to the GMS implementation, and payroll. Manual entries are for recording transactions in the GMS only. Manual entries should be for limited circumstances and should not replace automated data sync.
152	3.5.7 7. Financial Management FIN-10 Page 14	For payment reversals, is DCR expecting the system to initiate return actions (e.g., check reversal or A/R adjustment), or simply to flag and route the reversal for processing by an external financial system? Should vendors assume coordination with NCFS or other systems for execution?	No. These would be manually entered. Coordination with NCFS/CANOPY™ will be one-directional and should not anticipate them communicating back to the GMS.
153	3.5.7 8. Reporting RPT-1 Page 14	RPT-1 references multiple output file types. Can DCR specify which formats are required (e.g., CSV, Excel, PDF), and whether vendors must support custom report templates or standardized report layouts?	Commonly used file types (CSV, Excel, PDF) would be required. JSON and HTML file type are desired. Vendor should support standardized report layouts and provide flexibility to allow DCR staff to customize the report layouts.
154	3.5.7 9. Auditing AUD-1 Page 14	Does DCR require visibility into both the before-and-after values of data changes down to every single data field, or only the timestamp, user identity, and action type? Also, are there specific data fields or modules DCR considers high priority for audit tracking?	Yes, a complete cell history would be helpful for auditing purposes (for all field values that have been formally submitted and later altered). Most of the time, data fields or modules regarding finance data would be considered high priority for audit tracking.
155	3.5.7 10. Data Management DAT-2 Page 14	Can DCR clarify which system is considered the official System of Record for grant-related data— e.g., NCFS or another internal system/application?	The GMS will be the primary system of record. Other systems will contain additional data as required by federal guidelines.
156	3.5.7 10. Data Management DAT-4, DAT-5 Page 15	DAT-4 and DAT-5 reference DCR's data ownership rights and the requirement to receive all data upon contract termination. Can DCR clarify whether vendors	Vendors are expected to provide at least a read-only version of the system post-engagement. The "data" should include all supporting documentation (e.g.,

		are expected to provide a live or read-only version of the system post-engagement, or if structured data exports with schema documentation are sufficient? Additionally, does "data" include supporting documentation (e.g., uploaded files, attachments), and should vendors assume responsibility for organizing and linking these documents to their associated records for use in a successor system?	uploaded files, attachments). Vendors would be responsible for organizing and linking these documents to their associated records for use in a successor system.
157	3.5.7 12. Transition TR-2 Page 16	Can DCR clarify whether documentation is expected only in these areas or whether active teardown, configuration transfer, and successor vendor onboarding are required?	Areas are documented in the RFP.
158	3.5.7 14. Support SUP-1 Page 16	SUP-1 indicates that the vendor should provide technical support to "applicants" during intake center hours. Can DCR clarify whether this support is limited to system-related issues (e.g., login, submission errors) or if the vendor is expected to address applicant-specific inquiries related to their application? Additionally, which housing program(s) would be included in this scope of support?	Technical support would be primarily system related issues for all programs.
159	3.5.7 15. Project Management PMO-11 Page 17	PMO-11 references that vendors may be "required" to use the State's internal project templates and PMO standards. Can DCR clarify which templates are mandatory?	Not at this time.
160	3.5.7 15. Project Management PMO-13 Page 18	PMO-13 requests that vendors submit a detailed Draft Project Management Plan with the proposal. Can DCR clarify whether this draft is intended to serve as a preliminary outline for evaluation purposes, with the expectation that it will be collaboratively finalized post-	Yes, the draft plan is intended as an evaluation tool.

		award as part of the 60-day planning window outlined in PMO-14?	
161	3.5.7 15. Project Management PMO-13 Page 1	Understanding DCR’s ideal state—whether the priority is speed to launch, comprehensive joint planning, or both—would help vendors structure the implementation accordingly. If both are required, would DCR consider a phased deployment approach, with core functionality delivered within four months and remaining modules or features implemented on a rolling basis?	The State would be willing to work with the vendor on a phased approach but would require that the system would be operational within four months to begin taking applications for the programs that are described in the State’s CDBG-DR Action Plan (see <a href="http://www.commercerecovery.nc.gov">www.commercerecovery.nc.gov</a> and Question #2).
162	3.5.7 15. Project Management PMO-14 Page 18	PMO-14 states that the updated Project Management Plan is due within 60 days of project kick-off. Can DCR clarify whether this 60-day window is also intended to include discovery and requirements gathering activities? If so, how does this align with the four-month system implementation timeline—particularly where activities such as system configuration, API development, and integration with the Awarded Implementation Vendor depend on finalized requirements and external coordination?	The 60-days falls within the 4-month window.
163	6.1.16 Non-Responsive Offer Page 25	Does nonresponsive include proposal language that includes a validity date, such as “this proposal is valid for 90 days?”	No. Page One of the RFP states “Offer valid for one hundred twenty (120) days from date of bid opening.” Shortening the offer validity date will not be considered conditioning the proposal on an errata or exception under Section 6.1.12.
164	6.1.19 General Instructions for Offer Page 25	Section 6.1.19 requests that the entire offer be organized in the exact order in which specifications appear in the RFP.	Yes, include the entire RFP.

		Can DCR confirm whether this means the full RFP document must be embedded as page 1 of the submitted proposal PDF, or if only the cover page of the RFP is expected at the front of the submission?	
165	7.9 Confidentiality of Offers Page 30	To clarify, does the unredacted version of the proposal have the proprietary mark and the redacted proposal does not contain a proprietary mark?	Please mark the relevant portions of both versions "Confidential." In the redacted version, the marking may not show, or those pages may not be included, but some pages may contain portions that are confidential and portions that are not confidential.
166	Attachment E: Vendor Certification Form 2) Conflict of interest Page 62	In light of the conflict-of-interest provisions in Attachment E, can DCR confirm whether any current or upcoming RFPs or active vendor contracts may overlap with or influence the scope of this solicitation? Understanding potential interdependencies or boundaries will help vendors avoid unintended conflicts and more precisely define our proposed approach.	The scope of this solicitation is currently defined as well as possible, understanding that this is a new program and division, numbers of grantees are not yet defined, and needs may shrink or grow throughout the process. Known interdependencies, such as the interactions between systems, are identified herein.
167	Attachment F: Location of Workers Utilized by Vendor Page 63	Can DCR confirm whether employees based in U.S. territories such as Puerto Rico are considered workers performing work outside of the United States?	Employees based in U.S. territories are considered workers performing work outside of the United States.
168	<i>No Reference Citation provided by Vendor.</i>	Would the State be willing to extend the due date of May 29th?	No.
169	<i>No Reference Citation provided by Vendor.</i>	Have you had demonstrations and/or conversations with grants management vendors? If so, with whom?	There have been no demonstrations and/or conversations with grants management vendors.

170	<i>No Reference Citation provided by Vendor.</i>	Can you please provide the State's number of unique sub-recipient organizations?	No awards have been made yet. We anticipate up to 1,500 subrecipients.
171	<i>No Reference Citation provided by Vendor.</i>	Could the Department please clarify the anticipated duration of the \$1.4B CDBG – DR program intended to support communities impacted by Hurricane Helene? Is there an expected timeline for obligated and expending the funds associated with the programs?	6 years is the length of the grant and extensions are possible. Obligation and expenditure of funds will occur throughout the 6 years with most occurring in the first 3 years.
172	<i>No Reference Citation provided by Vendor.</i>	Please provide a list of systems currently housing on-going/historical grant information and for each please provide the data schemas and approximate number of records to be extracted, transformed, and loaded into the system.	There are no existing systems because this is a new division and new program.
173	<i>No Reference Citation provided by Vendor.</i>	Would the State be amenable to having all applications and current awards running by the end-of-the-year with post-award management functionality being implemented in January and February?	No. The State needs to make awards for the programs described in question 2 in the late summer and early fall of 2025. 2026 would be too late.
174	<i>No Reference Citation provided by Vendor.</i>	The RFP references a 4-month implementation timeline and a requirement to integrate with the State's financial system. Could the Department please clarify its expectations regarding the timing of the integration effort? Specifically, should the integration project run concurrently with the initial 4-month implementation and application intake configuration, or is it expected to occur after the go-live period?	The system being procured would not need to integrate with the state's financial system until after grants management system is up and running. Until DCR knows the procured system is up and integrating correctly, we will be handling NCFS tasks independent from the new system. We would not plan for this to integrate until after the go-live period. However, the integration should be considered during the 4-month implementation timeline so that it

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**Execute Addendum:**

**VENDOR:** \_\_\_\_\_

**AUTHORIZED SIGNATURE:** \_\_\_\_\_

**NAME and TITLE (Print or Typed):** \_\_\_\_\_

**DATE:** \_\_\_\_\_