

## Missingmoney RFP Questions

**Q: More than one service provider of UPND services will be qualified as to fulfilling the requirements of the RFP, will NAST / NAUPA award multi-vendor contracts?**

No, having one NAUPA-endorsed vendor provide all services unifies the state websites and provides legitimacy to the single website to avoid public confusion and to maximize our goals of 100% state participation.

**Q: To what extent will proposal responses be made public? Will content labeled “Confidential” within a proposal be withheld from public disclosure?**

All proposals received will be maintained as confidential until the awarding of the contract. Content specifically labeled confidential will never be made available for public discourse.

**Q: Are there particular expectations that the Contractor must meet around retaining and expanding participation in a national database of unclaimed property?**

Our goal with the database as described in the Background section is for ‘...the database would allow any person to determine the existence of abandoned or unclaimed property in any of the 50 states, the District of Columbia, and any other participating entity.’ The Contractor would be responsible alongside NAST/NAUPA for expanding and maximizing participation in the database with the goal of 100% participation.

**Q: Answers to questions will not be available until April 24th and responses are due on May 11th. Would NAUPA consider extending the May 11th submission deadline so that bidders may have time to understand any additional guidance resulting from the Q&A and adjust their proposals accordingly?**

No, NAUPA plans to adhere to the timeline in the RFP.

**Q: Item 3.4 requests that “Support for states will be made available via email or phone at a minimum with an accelerated turnaround time.” Use of the word “accelerated” implies comparison to a slower “baseline” turnaround time.**

**a. What comparison is being made?**

**b. How is “accelerated turnaround time” defined?**

This is in reference to a priority response for state requests as opposed to public search support requests. We leave that estimated response times to be defined in the proposal.

**Q: Item 4.2 indicates that “Special consideration will be given to seamless claim options.” What does seamless mean in the context of a MissingMoney national database and state-controlled claims management solutions?**

Seamless in this context means to the extent possible within each state-controlled infrastructure that the database would allow for ease of claiming by the public including state specific services. Some examples of these options include, but should not be limited to, FastTrack, email automation of claim forms/affidavits, avoiding duplication of claims, allowing one claim for multiple states as opposed to redirecting the individual to multiple states websites, etc.

**Q: Item 4.3 requests that “The website hosting the database should include basic information about unclaimed property and links to the NAUPA site as well as all state and international unclaimed property websites.” Will NAST clarify:**

**a. Which specific international unclaimed property websites are required?**

Any Province or other jurisdiction who is a member of NAUPA.

**b. Would NAST require approvals from a linked website prior to including the link on MissingMoney?**

Yes, NAST would require approvals before including links on the UPND website.

**Q: Item 4.4 asks for proposals to include explanations on data and cyber security. Given the extremely sensitive nature of this information:**

**a. How does NAST intend to restrict access to and fully protect this information?**

Any content labeled confidential will not be released to the public.

**b. What will be NAST’s records retention/destruction approach to these records?**

Information marked confidential will never be released. NAST will maintain all proposals received in a secured cloud storage environment.

**Q: Would the NAST confidentiality and records retention/destruction policy also apply to other information provided in a proposal?**

Yes, Information marked confidential will never be released. NAST will maintain all proposals received in a secured cloud storage environment.

**Q: Item 4.5 reports that “Member states have diverse philosophies on how the database should be fiscally supported.” Will NAUPA clarify:**

**a. The process the NAUPA evaluation committee intends to employ to reconcile the diverse philosophies?**

**b. How NAUPA intends to resolve**

Proposals will be reviewed individually with Fee structure being graded on a 20 point scale.

Conflicts will be resolved through the consensus of the evaluation committee.

**Q: The RFP does not specifically identify participation by as many states as possible as a goal of this RFP.**

**a. Is participation by all or nearly all states a goal of MissingMoney**

Yes, a goal of the UPND would be to maximize participation in the service.

**Q: The Selection Criteria allocates 20 points based on “Fees.”**

**a. Please clarify if these Fees are meant to be fees to NAST, fees to participating states, fees to users of the MissingMoney site, fees to claimant using the MissingMoney site, other fees, or any and all of the above.**

**b. Are all fee structures intended to be judged on the same 20-point scale**

Fees to claimants are outside the scope of services requested. Fees reference how the vendor anticipates recovering their costs. Yes, all fee structures will be judged on the same 20-point scale.

**Q: "NAST seeks a Contractor with existing relationships to state unclaimed property programs to administer a national database of unclaimed property." How are existing relationships with state unclaimed property programs defined and will vendors that have relationships with other related organizations like UPPO also be considered?**

"Existing relationships to state unclaimed programs" is defined as a working relationship between the Contractor and a State Unclaimed Property Program. A relationship with UPPO alone would not be considered sufficient for the purposes of this RFP.

**Q: "In lieu of the developing requirement of the RFP, is a turnkey UPND (an) acceptable service offering?"**

Yes, if the vendor met the minimum requirements and the service offering was capable of meeting the requirements and goals of a UPND.

**Q: "For the ease of preserving NAUPA's access to the best available technology (BAT) for searching owner records on a multi state basis, will the RFP remain open during the initial five (5) year term and any subsequent renewal (s)?"**

No, this RFP will close upon vendor contract and the process would be revised in a new RFP process as needed.

**Q: "What are the criteria for assessing a bidder's 'thorough knowledge of the unclaimed property reporting and claims process, etc'?"**

The vendor's knowledge will be demonstrated in their proposal through the process to advertise owner property on a UPND and the role it will play in the claims process.

**Q: "What costs are NAST and the states incurring by being participants in the UPND?"**

**NOTE: I am not inquiring as to amounts.... a classification would suffice.**

NAST does not incur any costs associated with the endorsement of the UPND, a goal of the RFP is to minimize state costs for participation.

**Q: "What criteria will be used to determine the efficiency of a customer service operation?"**

Customer service operations will be judged upon the services offered and the estimated service response times submitted in the proposal.

**Q: "Initial" qualifications implies additional qualifications will be issued. "If additional qualifications are to be issued, when will they be made available to potential bidders?"**

The term "initial" was intended to note that these qualifications are required prior to entering into the contract. No additional qualifications will be issued.

**Q: "What Criteria will be used to determine that an 'internet based searchable database structure operational with references to efficiency'?"**

The description of the services in the proposal and the references would be used to make that determination.

**Q: Knowledge of the NAUPA codes and formats - "Presuming 'reporting, electronic reporting and specific reporting nuances' are referring to holder reporting, what is the (relevance) of this required knowledge bank to an internet based searchable structure?"**

An understanding of the NAUPA reporting format is required as this will be the most common type of file reported to the UPND.

**Q: " What are the 'diverse philosophies'?"**

Our members have brainstormed several ideas as to how the UPND could be funded while minimizing costs to the vendor and state participants. We want to receive your thoughts.

**Q: The Evaluation Factor chart assigns 30 points to Customer Services, Communications and Other Responsibilities. Section 3.4 Customer Support specifies two easily attainable requirements:**

- "...maintenance and updating of a FAQ page and at minimum a contact form." and
- "Support for a state will be made available via email or phone at a minimum..."

**With full recognition of the importance of customer support, why would the Evaluator Factor chart assign:**

- Equality to the RFP's easily attainable specified customer support criteria (30 points) with that of Database and Website Functionality (30 points) and
- Superiority (30 points) to Background and Experience (20 points) referred to in the Evaluation chart?

**Additional question as to the Evaluation Factor chart: What are the "Other Responsibilities" in the Customer Services, etc section of the chart? What portion of the assigned 30 points will be allocated to "Other Responsibilities"?**

The functionality of the database and website is equally as relevant to "customer services, communications and other responsibilities" as the database's ease of use for the end user ultimately lends itself to a reduction in required efforts required to satisfy customer services, communications, etc. If the website functions seamlessly and without need for explanation or troubleshooting, the end user is less likely to require other forms of service to compensate. "Other Responsibilities" was added to capture any additional services suggested beyond the initial scope of the service, and will be taken holistically with the Customer service and Communication pieces.

**Q: "Are vendor interviews to be conducted before the proposal due date of May 11? Is this a typo?"**

Interviews will not be conducted until proposals are submitted. In the event that proposals are submitted early the week of the 11th will be the earliest that interviews could be conducted.

**Q: “In the event of a ‘No Award’ designation of a bidder, what is the process for challenging said designation?”**

The contract will be awarded based on the vendor responses to the RFP. A panel will review the responses and determine as a consensus the vendor to be awarded the contract. Once the evaluating committee makes a recommendation and the contract is awarded, there is no process for challenging the results.