



## Addendum #1 - Questions and Answers

Note to interested parties – we’ve received some great initial emails, questions and comments. We’re thrilled to see the level of engagement, thoughtful and creative questions and ideas that have already come in. This is a long window for proposing specifically to allow the opportunity to get to people. That seems to be working and we think this will lead to a much better end result. It will be competitive and we will be better for it.

Below are questions and answers gathered from potential proposers as of Thursday, June 18, 2026.

1. Can we partner with another agency and submit a joint proposal?

Answer – yes, joint proposals are fine. We are looking for one PM we can work with. We don’t mind cc’ing a team, but when it comes to communication and team hierarchy, we need to know who the responsible person is.

2. Is there any requirement for onsite engagement for this project? Or can the work be performed remotely from anywhere?

Answer – no physical meetings are required. It is anticipated the team will be entirely remote. We will be meeting virtually (Zoom or similar) for the duration of the project.

3. Can BEX confirm whether Canadian-based vendors are eligible to participate in this procurement and whether there are any restrictions, preferences, or evaluation considerations related to vendor location?

Answer – there is no preference for US-based vendors. We do need a fluent English speaker as our primary point of contact, and we want to meet during our business hours (Arizona, US).

4. Is a phased approach acceptable?

Answer – yes. We anticipate going live with a large chunk of functionality, and finishing any loose ends in phases. Because we already run this platform, we do need to go live with **\*at least\*** as much functionality as we already have. We do not want to go backwards before going forward.

5. What key challenges in the existing system are you looking to address with this new system?

Answer – that will be discussed in the scoping meeting in the next step.

6. What are the different user roles in the existing system?

Answer - Current roles include:

- Paid User
- Free view (incredibly limited)
- Admin
- Super Admin
- We anticipate adding more roles to the future platform.

7. Roughly how many users access your current system?

Answer – that will be disclosed in the scoping meeting in the next step.

8. Can you provide approximate counts for Projects, Procurements, Companies, Offices, Contacts, Locations, Users, Subscriptions, Saved Searches, Followed Projects, Notes, Reports and Files?

Answer – that will be disclosed in the scoping meeting in the next step.

9. Do any similar benchmark platforms exist as a reference for this project?

Answer: Not really, no. Most of our competition provides active bid tracking, but we go well beyond that with prebid and post bid project tracking.

10. Regarding point 14 in the scope of work section, please confirm if a mobile responsive web app is required. Android and iOS apps downloadable from the App Store and google play are not part of the current scope. Please confirm.

Answer – no Google or Apple store specific apps are expected. We want a web app that can have a shortcut/icon downloaded to someone's desktop/tablet/phone.

11. Regarding point 16 in the scope of work section, how many external system integrations are anticipated for this project?

Answer – not sure yet. Assume less than ten to start. The bigger question is can we set up API structures that protect us at the same time as meeting the customers' expectations.

12. With reference to point 17 in the scope of work section, can you share a bit more details on the expectations here? What would a use case look like for the required customization ability and flexibility? Is this required for the first launch?

Answer – the simplest automated workflows are date based triggers. We have a couple of these now – a specific date and time passes, and a very specific action is applied to a project. We anticipate building more automations like this but don't have any further examples at this time.

13. Can BEX provide an overview of the current Caspio implementation, including any custom workflows, automations, integrations, or limitations that must be preserved or improved?

Answer – this will be somewhat answered in the second step of the selection process, but a full exploration of the existing platform will only be granted to the awarded firm.

14. Is BEX expecting a complete migration of all historical data, documents, user accounts, saved searches, subscriptions, and reporting history from the existing platform?

Answer – yes.

15. Can you provide additional detail regarding subscription tiers, user permissions, geographic access controls, and any planned changes to the current subscription model?

Answer – see previous question for tiers of access. The geography access control is by state, but we do anticipate some future states needing to be further broken down into regions e.g. Texas or California are bigger than most countries. It makes sense to have their access control broken into regions, which will follow county lines. We will describe planned changes to the current subscription model at the next step.

16. What mapping capabilities are considered essential for launch?

Answer – that will be disclosed in the scoping meeting in the next step.

17. Beyond Salesforce and Deltek, what internal or third-party systems will require integration with the new platform?

Answer – we are not yet sure since we don't currently have this capability. These are the ones we know our customers use so we want them to be available to anyone. The bigger question is how can we build an API-ready platform that will work with whatever system our customers use.

18. Can BEX provide examples of the most commonly used reports today and identify any new reporting capabilities desired in the future platform?

Answer – that will be disclosed in the scoping meeting in the next step.

19. Can you describe the primary internal business processes and workflows that you would like the new platform to automate or improve?

Answer – that will be disclosed in the scoping meeting in the next step.

20. Are there specific AI use cases that BEX would like the platform to support at launch?

Answer – that will be disclosed in the scoping meeting in the next step.

21. Does BEX have a preferred hosting model and any requirements related to security, backups, disaster recovery, or data residency?

Answer – we use AWS for storage right now, but are open to the expertise of the successful respondent.

22. What are BEX's expectations regarding post-launch support, maintenance, response times, enhancement requests, and ongoing platform evolution?

Answer – we expect to enter into an agreement for ongoing support and maintenance after the initial build to cover this. We need responsiveness. We need the platform to work and to stay available to customers. We don't have firm expectations to share at the moment.

23. Are there known data quality issues in the current system, such as duplicate companies, duplicate contacts, missing geocodes, inconsistent market classifications, or outdated relationships?

Answer – very few known issues in data quality. Some of our records do become outdated and we want an auto-archiving system added to this next build. There are likely a few duplicates, but not many.

24. Are there any current platform features that users depend on heavily but are not clearly visible in the public pages or screenshots shared with the RFP?

Answer – no. We know our customers very well. What we have is very depended upon, and what we want to build next is what they're asking for.

25. For project search, what are the most important search modes to preserve or improve: keyword search, details-based filtering, location/map search, timeline search, solicitation search, company search, contact search, or saved-search alerts?

Answer – that will be disclosed in the scoping meeting in the next step.

26. For the mapping function, should users only search by address/market/location, or should the new platform also support radius search, polygon/area selection, county boundaries, saved map views, heatmaps, and project list creation from selected map results?

Answer – that will be disclosed in the scoping meeting in the next step.

27. For reporting, what reports are most important for launch: user-facing saved reports, admin performance reports, subscription/account reports, project activity reports, exportable Excel/PDF reports, or automated email reports?

Answer – that will be disclosed in the scoping meeting in the next step.

28. Should subscribers be able to self-manage users, seats, billing details, upgrades, renewals, discounts and prorated changes, or should some of these remain admin-controlled?

Answer – that will be disclosed in the scoping meeting in the next step.

29. Are there specific restrictions around exporting data, downloading files, copying contact details, or accessing data through APIs that BEX wants enforced by subscription level or user role?

Answer – this is the type of thing we need our vendor to help us navigate.

Right now we're being asked for API's but we have not yet built any. We need good advice and technical expertise to help us navigate how to protect our IP and meet the needs of the customer.

30. Which internal systems should be integrated in the initial build, and which can be future-phase integrations? For example: CRM, email marketing, accounting, support ticketing, AWS document storage, analytics, or internal workflow tools.

Answer – that will be disclosed in the scoping meeting in the next step.

31. For customer-side integrations, should the first release provide direct integrations with systems such as Salesforce or Deltek, or should the platform first expose a secure API/export framework that can support those integrations after launch?

Answer – that will be disclosed in the scoping meeting in the next step.

32. How does BEX want to balance customer AI access with proprietary data protection? For example, should users be allowed to connect AI tools only through controlled API endpoints, limited exports, permission-based datasets, usage logs, or rate-limited access?

Answer – this is the type of thing we need our vendor to help us navigate. We are not sure yet.