



ADDENDUM

Date: **April 21, 2023**
Subject: **Category Management analysis and Validation**

RFP Number: **20221028**
Due Date/Time: **May 5, 2023, 10:00 a.m. ET**
Addendum Number: **1**

To All Applicants:

A solicitation "Addendum" is defined by the Commonwealth of Pennsylvania as an addition to or amendment of the original terms, conditions, specifications, or instructions of a procurement solicitation (e.g., Request for Proposals or Request for Quotations).

List any and all changes:

- Attached are questions received as of 10:00 AM, April 7, 2023, along with the PLCB's responses.

For an Applicant's application to be considered, the Offeror must:

- Contact Issuing Officer Betsy Novelli identifying an email address to be granted access to upload files to a OneDrive folder established by the PLCB.
- After being granted access to the OneDrive folder, the Applicant must upload a single copy of each of two separate electronic files (the technical proposal and the cost proposal) by 10:00 AM ET on May 5, 2023.
- All applications must be properly signed, per the [signature requirements of the Pennsylvania Procurement Handbook](#).

Except as clarified and amended by this Addendum, the terms, conditions, specifications, and instructions of the solicitation and any previous solicitation addenda, remain as originally written.

Respectfully,

Name: **Betsy Novelli**
Title: Issuing Officer
Phone: 717-257-6158
Email: enovelli@pa.gov

**Questions and Answers for
Category Management Analysis and Validation**

PLCB RFP # 20221028

Q1. What does the PCLB envisage the role to be, if any, of vendor category captains going forward?

Please refer to Part I-3 Overview of Project. The PLCB seeks Applicants to assist the PLCB in analyzing category management practices, policies and procedures; evaluating store clusters; considering, executing and evaluation merchandising tests; and ensuring that beverage alcohol and retail industry best practices are exercised to enable the PLCB to reduce cost, improve performance, maximize the use of shelf space, and increase customer satisfaction.

Q2. Does the PLCB have an anticipated budget to support work under this RFA?

Please refer to Part I-6 Type of Contract and Part I-20 Performance Assumptions. This will be a no cost contract and the Applicant shall provide all services, supplies, facilities, and other support necessary to complete the identified work.

Q3. Is there any reason why Wines and Spirits are treated separately?

Primarily because the marketplaces for wine and for spirits differ, and expertise tends to fall in one or the other category.

Q4. Beyond the productivity and c-sat objectives, are there other specific considerations (social/regulatory)?

Please refer to Part I-3, Part I-28, and to Part IV for a description of all tasks requested.

Q5. How are you envisioning the role of merchants/buyers vs. category captains? (e.g., will you plan to take the category captain recommendations wholesale or work with merchant/buyer to adjust)

Please refer to Part I-28(B), TTB Regulatory Compliance. The PLCB has sole discretion to make final determinations on any recommendations provided by Category Captains.

Q6. How far are you expecting the output to be taken in terms of plan-o-gram and what interaction would we have with their merchant/buyers?

Please refer to Part I-28(B), TTB Regulatory Compliance. Captains and Validators would not have routine, daily interaction with buyers, as that would be considered involvement in day-to-day operations of the PLCB. Also refer to Part I-20, Performance Assumptions, which indicates that the selected Applicant will have direct access to key decisionmakers and other personnel throughout the PLCB during the course of this engagement. Direct access must be limited and must not rise to the level of involvement in day-to-day operations.

Q7. Are you seeking an ongoing service, rather than us building and passing on the capability for you to do yourselves going forward? What is the frequency of the activities expected under this scope?

Please refer to Part IV-5, Transition Plans. Applications shall include a sample plan to transfer data and files at the end of the contract period. Please refer to Part IV-3 and Part IV-4 for the frequency requested on each task.

Q8. What types of data will be available and at what granularity, e.g., store x item-level data; customer data; store & space data.

We anticipate that customer data will not be provided. Item sales data available will generally fall into three categories. All are examples of data, and should not be construed as a comprehensive list:

- Item Data
 - Item numbers (4 unique numbers to identify each unique item)
 - Merchandise Hierarchy designation – where does each item fit within the Merchandise Hierarchy
 - User Defined Attributes (UDA's) – additional designations that further describe and define an item (e.g. Closeout, Chairman's, Price Segment, Licensee Only)
 - Cost – Landed cost for each item
 - Supplier
- Location Data
 - Each PLCB brick and mortar location (FW&GS, LSC, E-commerce fulfillment location, 3PL operated DC).
- Transaction Data
 - When and where each transaction was executed, and how much was sold, units, dollars – header level data.
 - Transaction detail, which item, what price, retail or licensee sale.

Q9. What do the plan-o-gram benchmarks include? (e.g., external trends? Shelf-set guidelines? Adherence to plan-o-gram guidelines?)

The benchmarks include category trend information, sales data and days of supply for each replenished item to give on shelf placement. The benchmarks are the guidelines for creating all individual store planograms.

Q10. What is the scope of "validator": Does this include review of assortment/clustering decisions or plan-o-gram only (defined above)?

Please refer to Part IV-4 Lot 2 Category Management Validator Services, Task 2. As requested by the PLCB, the Validator will review, validate and/or provide alternate points of view on the additional Category Captain tasks identified in Part IV-3 Lot 1 Category Captain Services.