RFP #25-32-IT Contract Management Solution

Addendum I

Questions & Answers
(County responses and changes are in red)

Questions & Answers

1. What regarding the confidentiality aspects of the proposal lead the county to rerelease? (Section 3.1 PROHIBITED COMMUNICATIONS AND CONFIDENTIALITY)

   This RFP was re-released because we had vendors decline to bid as they could not meet the 6/30/25 deadline, so we wanted to allow for vendors to still bid and provide their implementation timeline. Of the proposals received, 3 were non-responsive because they did not follow the confidentiality requirements. **Nothing** can be marked "confidential" or "proprietary" in the proposal submission, **UNLESS** the vendor has contacted the Finance Department prior to submission and received approval to do so. In an effort to receive more responses to allow for competition and make sure the County chooses the best option for our needs, the RFP was re-released with more notations to bring attention to the confidentiality requirements.

2. Is it necessary that vendors resubmit their RFP again as it's the same as the original?

   Yes, any proposal previously submitted must be re-submitted for RFP #25-32-IT to be considered.

3. If all users were logged in at the same time, what percentage would be actively using the system concurrently?

   Anywhere from 25-35 individuals.

4. How many users will require admin-level access versus requester-level access?

   There will 3 System Administrators who will have access to every aspect of the system.

5. With the reissuance of the proposal, what is the newly expected go-live date?

Please see within the RFP where we state the preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

6. When do you anticipate making a final decision?

   Approximate date would be April 30, 2025, unless something arises.

7. Will the County extend the proposal due date to allow for a minimum of two (2) weeks between issuance of answers to the Q&A period and proposal due date? This is necessary to allow adequate time to review technical aspects and provide the County with a responsive proposal, inclusive of a proposed Statement of Work.

   No

   Migration:

8. How many files/documents/records total in the repository?

   No, data migration is not needed for this proposal.

9. Of those, how many files/documents/records will be migrated?

   No, data migration is not needed for this proposal.

   If the objects to sync are documents: N/A

10. Do documents have multiple versions that should all be maintained?

    No, data migration is not needed for this proposal.

11. Should document metadata be synchronized?

    No, data migration is not needed for this proposal.

12. How many Cases, Workspaces, records, contracts, or other non-file objects are in the repository? List object type and count.

    No, data migration is not needed for this proposal.

13. What is the total number of data fields each matter type requires to be migrated?

    No, data migration is not needed for this proposal.

14. Of those, how many will be migrated?

No, data migration is not needed for this proposal.

15. What filter criteria will be applied to identify/scope the files/records to be migrated?

    No, data migration is not needed for this proposal.

16. Are there security/permissions requirements for the documents/objects being migrated?

    No, data migration is not needed for this proposal.

17. Will documents or metadata require conversion of any kind as part of the migration? (IE value NY convert to New York)

    No, data migration is not needed for this proposal.

18. Briefly explain how the source system is structured. For example, if the source is SharePoint, what constitutes a site, document library, folder, etc.

    No, data migration is not needed for this proposal.

19. Describe any other known deployment customizations.

    Everything that we are requiring is listed on the functional requirements Excel spreadsheet.

20. Will the City provide a technical resource to coordinate/prep migration to the proposed solution?

    No, data migration is not needed for this proposal.

    Integrations:

21. Please identify all products which require integration with the solution and if they are Cloud or On-Prem based tools.

    All possible integrations are listed on the functional requirements Excel spreadsheet.

22. Will this be a one-way or bi-directional data exchange?

    N/A.

23. If one-way, which direction will data be transferred?

    N/A.

    If the objects to sync are documents:

24. Do documents have multiple versions that should all be maintained?

Version control is part of the proposal request.

25. Should document metadata be synchronized?

    Need more clarification on this question.

26. If the objects to sync are record data (IE Users or Financial data) how many different fields of data does each record type have to synchronize?

    Need more clarification on this question.

27. Would you prefer the synchronization process be automated or would users be creating the rules for which data to synchronize?

    Need more clarification on this question.

28. General - What is your critical date to go-live? Does this date correspond with any critical dates to migrate data from the legacy system?

    Please see within the RFP where we state the preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

29. General - Will you and/or proposed vendor have access to the legacy system for purposes of migration following termination of your existing contract with the legacy system, if applicable?

    No, data migration is not needed for this proposal.

30. Please confirm the total number of internal users for the proposed solution and provide a breakdown by group/department/unit of total number of users and access they require (read only, edit, etc.). Please identify any applicable IT staff that will require access to the proposed solution.

    The list of users is listed within the RFP and the previous RFP Questions & Answers.

31. Please confirm the total amount of vendor-hosted storage requested in the proposed solution.

    This information is unknown at this time.

32. General – Is this project currently funded? If so, please provide the budgeted amount.

    We will not be providing the budget.

33. M22: Please provide a list of each stage of a contract phase

    Our current contract phases will be discussed during our demos.

34. M26: Please provide more detail. Do you require the ability to download a back up to a County server outside of the proposed solution?

   If we need to download a copy of a file, the County should have that ability.

35. M34: Please describe your current restrictions during legal review.

   Hyperlinks, indemnification clause, etc.

36. O1 & O12: Who is your current eSignature provider?

   OneSpan

37. Q3: Does this requirement reference SSO? Please provide more detail.

   No, being able to integrate with Microsoft Active Directory would be greatly appreciated.

38. S3: What KPIs do you currently track?

   We are currently unable to do this since it's a paper driven process. We are requesting that be a part of the proposed system.

39. S4: How do you currently categorize compliance and risk? How do you currently track this data?

   We are currently unable to do this since it's a paper driven process. We are requesting that be a part of the proposed system.

40. U4: Please describe the "visitor" group. Are these individuals internal or external to the county? Do they need visibility into just the information/contract they submit?

   Read only access – external users.

41. U6: Please provide more information as to what you mean by unlimited users based on role-based controls.

   Ability to increase the number of concurrent users without a cap.

42. W4: Please describe the integration requirements with Microsoft Graph. For example, do you need a way to create your own workflows and integrations via webhooks? Is this specific to the AI component of the CLM System itself?

   Yes, AI component.

43. Y1: Please describe your current process.

Currently Finance and Legal review each contract to identify risks.

44. Y3: Please describe your current process.

    Currently Finance and Legal review each contract to identify risks.

45. Please indicate the total number of Internal full user license.

    There are 3 System Administrators who will need full access to every aspect of the system. The user count is listed within the RFP under the purpose and background section.

46. Please indicate the total number of internal County users that need to view *only their submissions.*

    Each department will only be able to see just their submissions.

47. Please indicate the total number of internal County users that need to have view only of *other users submissions*.

    Each department will only be able to see just their submissions.

48. Please indicate the total amount of storage required?

    This information is unknown at this time.

49. Please indicate the total number of contracts reviewed and stored per year.

    This was answered in the RFP under Section 1.0 Purpose and Background.

50. Do you have a critical date/loss of existing that system that must be taken into account during implementation?

    No.

51. What is your current system?

    Our current process is paper driven with Munis being our financial system of record.

52. Is it possible to extend the proposal due date by a week?

    No.