



## RFP #25-26-IT Contract Management Solution

### Addendum II

#### A. Modification to Questions & Answers

(County responses and changes are in red)

(Modifications made in this specific addendum are highlighted yellow)

#### A. Modification to Questions & Answers

1. I am currently working to get the questions on the spreadsheet you attached completed ASAP. I should be able to get them completed by early next week but that put us past the due date (2/21) specified in the attached PDF. Please let me know if you will be able to accept them next week as we are very interested in partnering with you on this project.

Your proposal and response to the functional requirements on the spreadsheet were originally due back on March 4<sup>th</sup> at 2:00 PM. An extension has been granted to have the RFP due back on March 11<sup>th</sup> at 2:00 PM. Please make sure to read and follow the submittal instructions under Section 2.2. If you have any questions **about** this RFP, they were due February 21<sup>st</sup> by 5:00 PM.

2. Proposal Submittal: With the short timeline, is physical copy and USB the only acceptable way of submitting?

Yes, the IT RFP procedure being followed requires sealed proposals. Please make sure to follow the instructions within the RFP section 2.2 Proposal Submittal.

3. Vendor Profile A-10: There is a request for 3 references from customers in North Carolina, is this a requirement of only being in North Carolina?

No, if you do not have any North Carolina references, please state that and provide other references of similar size and scope. If you do have references located in North Carolina, please provide those. Also, please ensure that the customer has the same product and version that you are quoting within your RFP response.

4. Clarification on Functional Requirements: Are there any specific integration requirements with Munis beyond standard APIs?

No, just a standard API.

5. Clarification on Functional Requirements: Can you provide additional details on the required integration with Munis (Tyler Technologies)?

Would like to be able to have purchase order number, contract number, budget line number, and dollar amount.

6. Technical & Customization Needs: Are there preferred formats or specifications for the data export/import features?

Excel, PDF, and CSV.

7. Technical & Customization Needs: Can you provide more detail on specific AI use cases expectations?

Our expectation for AI is described on the Contracts Management tab under “W. Artificial Intelligence (AI)” section. If your system can do more than those requirements, please provide details on your RFP response.

8. Technical & Customization Needs: What are the critical compliance checkpoints for North Carolina General Statutes? Are there specific compliance standards (e.g., NIST, HIPAA, FedRAMP) that the system must meet?

G.S. 160A-16 – Requirement for municipal contracts to be in writing.  
G.S. 22-2 – Conveyance of real property exceeding three years must be in writing.  
G.S. 143-129 – Formal bidding requirements for construction and purchase contracts.  
G.S. 25-2-201(1) – Sale of goods exceeding \$500 must be in writing.  
G.S. 14-234(d1) – Conflict of interest exceptions and procedures.  
G.S. 143-131 – Informal bidding requirements for construction and purchases.  
G.S. 143-64.31 – Qualifications-Based Selection process (Mini-Brooks Act).  
G.S. 143-64.32 – Exemptions from the Mini-Brooks Act.  
G.S. 22B-3 – Prohibitions on forum selection clauses requiring disputes in another state.  
G.S. 22B-10 – Prohibition of jury trial waivers in contracts.  
N.C. Const. Art. V, Sec. 4 – Constitutional limitations on local government indemnifications.  
G.S. 143-133.5 – Organized labor restrictions for public contracts.  
G.S. 153A-449(a) – Employment and public accommodation requirements for counties.  
G.S. 160A-20.1(a) – Employment and public accommodation requirements for cities.  
G.S. 143-133.3 – E-Verify compliance for public contracts.  
G.S. 147-86.60 – Iran Divestment Act prohibiting contracts with certain entities.  
G.S. 147-86.82 – Israel Boycott Contracting Prohibition.  
G.S. 159-28 – Preaudit certificate requirements for public contracts.  
G.S. 228-3 – Restrictions on real property improvement dispute venue selection.

Compliance standards HIPAA, CJIS, FTI (IRS Federal Tax Information), PCI must be met for certain departments. All vendors of technology solutions must complete the Cumberland Vendor Security Questionnaire before final approval. The Vendor Security Questionnaire will be completed by the selected vendors who has been deemed highest-ranking. Please keep in mind that all Cumberland County contracts are considered public records and are subject to disclosure under the public records laws.

9. Technical & Customization Needs: Will the County require electronic signatures to be integrated with a specific provider (e.g., DocuSign, Adobe Sign) or they are open to use the native signature features of the offered platform?

The County currently uses OneSpan, but if your system has a built-in electronic signature component, please notate that on the appropriate functional requirements line on the Contracts Management tab – O Electronic Signature/Approval Workflow – O.14.

10. Budget & Evaluation Criteria: Is there a budget range for this project that vendors should align with?

We will not be providing a budget range.

11. Budget & Evaluation Criteria: Are there weightages or specific expectations for the on-site/virtual demonstration?

This information is described under section 3.4 Evaluation Criteria within the RFP. Once the highest-ranking vendors are selected to move on to the next phase, they will be given a vendor demo script and a copy of the vendor rating sheet.

12. Implementation and Support: What are the expected timelines for system deployment and go-live?

June 30, 2025

13. Implementation and Support: What level of post-implementation support is required?

Maintenance and support for the system.

14. Implementation and Support: What are the County's expectations regarding data migration from the current system?

No data migration will be needed.

15. Stakeholder Engagement: How many external vendors and county stakeholders are expected to use the platform?

The number of users has been outlined within the RFP under section 1.0 Purpose and Background. As far as external vendors, approximately 85% - 90% of our contracts come from external vendors.

16. Infrastructure and Technology – H: Your RFP has a section for both On-Premise and SaaS, we are a public cloud SaaS software built on Azure with no On-Premise solution, is On-Premise capability the only requirement?

If your organization only provides SaaS software, complete the SaaS functional requirements tab. For the On-Premise tab, mark your answer as N/A.

17. In order to provide pricing in the proposal we will need to know the number of users broken down by type of user/roles. (Administrator – all access, Editor – can access all but advanced admin features, Contributor – uses contract templates and workflows, can generate a document, Validator – can read and download documents shared with them and participate in validation workflow, Reader – can only access, read and download documents shared with them)

This information has been outlined within the RFP under section 1.0 Purpose and Background. There will be 3 System Administrators.

18. I have reviewed the RFP document, but I'd like to confirm with you; would Cumberland County be willing to put a mutual NDA in place for this process?

Please review the RFP section 3.1 Prohibited Communications and Confidentiality. This process is public record.

19. Are you all looking to integrate with a specific eSignature tool (DocuSign/AdobeSign etc) or use eSign of the CLM you award?

See answer to Question #9.

20. Are you all also looking for click to accept mode, in addition to eSign?

We must have e-Sign.

21. Do you need Fedramp compliance? If so, in what capacity?

Fedramp is not a requirement but a Fedramp compliant solution would be accepted.

22. What type of contract workflows are you planning to use CLM for?

The CLM will be used for every type of contract workflows from basic, lease, purchases, construction, engineering, technology, etc. In your response, please list the different types of contract workflows that your system currently has.

23. I noticed the listed out departments, are you looking to have 101 users for access to CLM? (21 for legal/finance + 50 requesters + 30 approvers) Or will you need more?

See answer to Question #17.

24. There is a line item of integration with CRM & Procurement, which CRM & Procurement platform would you like to integrate with?

Tyler Technologies – Munis.

25. I see analyst awarding is not listed under importance, will you be reviewing Gartner, Forrester or IDC reports on CLM?

This will not be applicable. Please refer to RFP section 3.3 Proposal Evaluation Process and 3.4 Evaluation Criteria.

26. I apologize if I missed this but what date do you plan to award the vendor of choice?

No date has been determined as of yet, but please refer to RFP section 3.3 Proposal Evaluation Process and 3.4 Evaluation Criteria.

27. What your go live date?

June 30, 2025.

28. The RFP has over 500 long form questions in Excel format, with a 2-week window from issuance, for a mailed response. Will this opportunity be extended given insufficient time to respond and mail or alternatively can this be electronically sent.

See Modification to Language for due date extension and see answer to Question #2 regarding proposal submittal.

29. Will the County consider an extension of at least two weeks to the due date, so that a comprehensive response may be provided to this proposal?

See Modification to Language for due date extension.

30. Is the County only considering commercial off-the-shelf/modified off-the-shelf (COTS/MOTS) solutions, or will custom-built software be considered in response to this proposal?

Just Commercial off-the-shelf (COTS).

31. Does the County have a preferred platform or technology stack and if so, what is it?

No.

32. Is the County considering only cloud-based or on-premises solutions, or will both options be considered?

SaaS is our preference.

33. Approximately when are the demonstrations expected to take place?

Anywhere between mid to late March 2025.

34. What is the budget that the County has allocated to this contract management solution?

See answer to Question #10.

35. Does the County have an expected implementation timeline for this solution and if so, what is it?

June 30, 2025.

36. What is the County's definition of similar work for the references?

See answer to Question #3.

37. Does the County have a preference for the work to be performed onsite, remote or hybrid?

The County does not have a preference; however, please provide the cost for all available options.

38. Does the County want the solution hosted?

See answer to Question ~~#33~~ 32.

39. Does the County have existing paper or electronic contracts they want converted and if so how many?

No.

40. Does the County have existing Contract Templates they want to house in the system and if so how many?

The existing contract templates will vary depending on the department. For example, Legal has approximately 7-10. Please provide a list of contract templates that are available within your system via your RFP response.

41. How many simultaneous users would need access to the Contract Repository to retrieve contracts?

Approximately 20 – 25 concurrently.

42. Hosting Options: Would you prefer pricing for the Contract Management to be hosted by vendor (SaaS/Cloud) or deployed on your organization's server (on-premise), or is the County looking for pricing for both options?

See answer to Question #33 32.

43. User Licensing: The County stated that the legal and financial teams have 21 employees, and roughly 50 department administrators, as well as 30 contract approvers, for a total of 101 employee.

a. How many internal users will require full administrative level access?

3 – Sys Admin.

b. How many internal users will require the ability to add, edit and delete?

101 users will be utilizing the system. However, it has not been determined who will have all these rights. Please provide a copy of your user roles and permissions template with your RFP response.

c. How many internal users will require request only access?

The request only access is not needed.

d. How many internal users will require read-only access?

Every licensed user will need read access.

e. How many internal users do you project will require access to the system at any given time?

20-25

44. AI Questions: Is your organization in need of enhanced generative AI features and data & risk analysis?

Not needed. Only a basic AI feature is needed, if it is included within the Commercial off-the-shelf (COTS).

a. If so, how many contracts per month do you believe will need to be run through the AI software?

Not applicable.

b. What is the typical page count for your contracts?

Not applicable.

c. Is this something you want available to all users?

Not applicable.

45. Data Import: Does your organization require data import services? If so, please expand upon the data migration/importing requirements for the Contract Management Software? (Such as record info, employee lists, vendor lists, etc.)

See answer to Question #14.

- a. How many total electronic files (PDF, MS Word, etc.) in current/legacy system into the system that needs to be imported into the system?

Not applicable.

- b. How much metadata (rows in the exported spreadsheet) is in the current/legacy system?

Not applicable.

- c. Where are the legacy (historic) electronic contract files currently stored? (shared folders, SharePoint, document management system, paper, etc.)

Not applicable.

46. Data Integration: Can you please expand upon your preferences to integrate with Munis, OneSpan, and Microsoft Graph? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.

Tyler Technologies Munis – API.

OneSpan – Electronic signature.

Microsoft Graph – Will be used for CoPilot.

47. Data Integration: Are there any additional systems that may require a one-time data import such as a legacy Contract Management system?

No.

- a. If so, please provide the system name, version, scope of use, the total number of contract records, and files being imported into the system and SOAP/REST API, if available.

Not applicable.

48. Data Integration: What objects, fields and tables will your organization be passing in the data integration between the Contract Management Solution and Munis/OneSpan/Microsoft Graph?

Our organization cannot specify the exact objects, fields, and tables for data integration at this time. We would need the vendor's API reference and documentation, provided in their proposal, to determine what fields to parse and how the integration would be structured.

49. Data Integration: Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?

Munis is hosted on-premises, while Microsoft Graph and OneSpan are cloud-based solutions.

50. Data Integration: Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements?

We have not yet developed integration process flows, as this is a new process for the County. We need to understand the capabilities and integration options of the proposed Contract Management Solution before designing and implementing a process flow.

51. Document Templates: What documents/contract types would you like to author within the system (number of templates?)

Contract workflows from basic, lease, purchases, construction, engineering, technology, etc.

52. Document Templates: Do you require professional services to configure templates?

Yes. Please include the cost for professional services with your RFP response.

a. If so, how many would be required for the awarded vendor to configure?

See answer to Question #41 40.

53. Workflow: Do you require professional services to configure workflow processes?

Yes.

a. If so, how many would be required for the awarded vendor to configure?

Unknown at this time. Please provide the cost for this within your RFP response.

54. Workflow: Can you please provide additional details about your organization's workflow/approval processes?

All workflow processes will be based on the ability to review, approve, and execute (e-sign) through Department Head, Finance, Legal, and if applicable, County Management and the Board of Commissioner's Chair.

a. Can you please provide number of steps and examples?

The number of steps will depend on the type of contract and the number of people involved within the process.

55. Implementation: Do you have an established time frame for the implementation of the awarded solution?

June 30, 2025.

a. If so, what are the anticipated kick-off and go-live dates?

Late April for kick-off and June 30, 2025 for Go-Live.

b. If no specific dates have been established, how many weeks do you plan to dedicate to the implementation process?

See above.

56. Public Sector Bids: Is your organization eligible to purchase off the GSA Schedule 70?



Yes.

- a. If yes, would you like GSA pricing in the bid response or retail pricing?

Whichever provides the best price.

57. Public Sector Bids: If in the event our response is subject to an Open Records Request, will we be notified and given the opportunity to provide a redacted response in accordance with applicable Freedom of Information laws?

Please see Section 3.1: Confidential Information of the RFP, which provides instruction on how to request approval to mark information confidential within your proposal. Any proposal marked with any information as "confidential" or as a "trade secret" or in any other manner as to indicate that it is information protected by the Act in violation of Section 3.1 of the RFP shall be regarded as not responsive to the RFP and shall not be considered.

58. Does the awarded vendors staff have to be e-verified, run through OFAC sanction lists, and meet US working regulations?

Contractor shall comply with the requirements of Article 2 of Chapter 64 of the General Statutes. Further, if Contractor utilizes a subcontractor, Contractor shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the General Statutes.

59. [For bids that request Digital Signature] Does your organization require digital signature option vs electronic signature option? Digital signature solutions leverage certificate-based digital identification for validation of document integrity as opposed to the more common electronic signatures. Digital signature requires additional validation services and are priced higher.

Please provide the cost for both options.

60. Does your organization require an electronic signature tool?

Yes.

- a. If so, are you currently utilizing a specific product and which tool are you using?

OneSpan.

61. Is the County an existing ServiceNow user?

No.

62. Can a mix of on-shore and off-shore resources (based out of India) be proposed for implementing the solution?

The data and data backup must be housed within the United States.

63. What is the source of these contracts and how are they generated?

Any purchases that are made by the County. They are generated via a contract template or obtained from an external vendor.

64. What is the budget allocated for this project?

See answer to Question #10.

65. What data/contracts are to be imported into the ServiceNow platform? In which format are these existing contracts saved in?

None.

66. How many existing contracts need to be imported?

None.

67. What is the e-signature provider that the County is using?

The County currently uses OneSpan, but if your system has a built-in electronic signature component, please notate that on the appropriate functional requirements line on the Contracts Management tab – O Electronic Signature/Approval Workflow – O.14.

68. What is the purpose of Integration with Tyler Munis, OneSpan, Microsoft Active Directory, Microsoft Outlook? What are these systems being used for and do you need a uni-directional integration or bi-directional?

The County is currently utilizing Munis and OneSpan. Microsoft Active Directory for LDAP syncing. Microsoft Outlook for communications with the vendor within the proposed software solution.

69. How many systems are in scope for integration? Can you please mention them?

Please review the functional requirements Contracts Management tab Q System integration – Q.1 – Q.5. These are not required; the County is just inquiring about the available options.

70. What types of contract data need to be extracted using AI?

Please provide the options that are available within your system, if applicable.

71. Do you expect AI to extract data from newly uploaded contracts only, or should it process historical contracts as well?

Approximately 85% - 90% of our contracts are initiated from external vendors. The system will need the ability to have some type of drag/drop and/or upload/import feature that will allow certain contract data to be automatically filled out for the selected contract template identified fields. Historical contracts will not be imported.

72. RFP Section 1.0 Purpose and Background (p. 3 of 16, 2<sup>nd</sup> paragraph) - Based on the number of employees, approvers, and administrative submitters listed in the paragraph, does the County expect to have at least 101 users for the Contract Management System?

Yes.

73. RFP Section 1.0 Purpose and Background (p. 3 of 16, 2<sup>nd</sup> paragraph) – Will other departments besides Finance and Legal be able to use a comprehensive content management system?

Yes, the 101 users represent all 31 County departments.

74. RFP Section 4.0 A Scope of Work, Objective #12 (p. 7 of 16) – Approximately how many external vendors and/or county stakeholders will need access to the system?

Unknown. We prefer to have a vendor collaboration portal so they will not need direct access to the system. They will need to be able to do contract red-lining and negotiation.

75. RFP Section 4.0A Scope of Work, Objective #12 (p. 7 of 16) – Is it expected that external vendors and/or county stakeholders need direct access to the platform, or can that access be available through a portal for external users?

Preferred method for vendors is to have access available through a portal.

76. Do you have, and can you disclose, an estimated or maximum budget for the project?

See answer to Question #10.

77. I see a note about physical delivery, can you confirm if we need to physically mail in a proposal + USB or if email attachment will suffice?

See answer to Question #2.