



**Innovation and Technology Services (ITS)**

**RFP #25-32-IT**

**Contract Management Solution**

**Date of Issue: March 14, 2025**

**Questions Due Date: March 20, 2025 (Thursday) at 5:00 PM (EST)**

**Proposal Due Date: March 28, 2025 (Friday) at 2:00 PM (EST)**

**Direct all inquiries concerning this RFP to:**

Sophia Murnahan

Purchasing Manager

Email: [CumberlandPurchasing@cumberlandcountync.gov](mailto:CumberlandPurchasing@cumberlandcountync.gov)

Phone: 910-678-7743

Proposals shall be submitted in accordance with the terms and conditions of this RFP and any addenda issued hereto.

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## **1.0 PURPOSE AND BACKGROUND**

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**THIS SOLICITATION IS A RE-BID. ALL PREVIOUS PROPOSALS WILL NOT BE EVALUATED AND MUST BE RE-SUBMITTED. PLEASE MAKE SURE TO FOLLOW ALL INSTRUCTIONS STATED IN THE RFP TO AVOID YOUR PROPOSAL BEING MARKED NON-RESPONSIVE. ANY PROPOSAL WITH CONFIDENTIAL MARKINGS THAT DID NOT FOLLOW THE INSTRUCTIONS IN SECTION 3.1: CONFIDENTIAL INFORMATION TO RECEIVE PERMISSION TO MARK INFORMATION AS CONFIDENTIAL WILL BE MARKED NON-RESPONSIVE.**

Cumberland County, North Carolina (“the County”) is seeking proposals from qualified vendors to supply a Contract Management System (CMS) to support the County Finance and Legal Department. The goal of the project is to streamline the entire lifecycle of contracts, from creation and negotiation to execution, monitoring, and renewal or termination. The proposed system must incorporate electronic signatures and seamless approval workflows throughout the entire contract process. It is imperative that the County maintain compliance, mitigate risks, improve efficiency by centralizing and automating the management of contractual agreements, improve accessibility, and maximize value.

Cumberland County Finance and Legal Department currently has twenty-one (21) employees, which includes (1) Finance Director, (1) Finance Accountant Manager, (1) Purchasing Manager, (1) Procurement Specialist, (1) County Attorney, (1) Assistant County Attorney, and (1) Paralegal that are involved in the contract process. The County’s contract process is currently a paper driven process on the front end and the financial aspect of the contract process is handled through Munis, which is a product of Tyler Technologies. Over the last three fiscal years, the Finance Department has processed approximately 1,125 new contracts so far. Approximately 1,585 contracts were keyed by the County’s thirty-one (31) departments, but this number includes contracts that were entered in error and department deleted them and/or the contract was rejected. This number does not include contract amendments or change orders that were keyed, as this number has not been tracked. There are approximately fifty (50) departmental administrative submitters who are responsible for the initiation and negotiation of the contracts and thirty (30) contract approvers who are responsible for ensuring that the contracts are following the rules and regulations that are written within the Cumberland County Policies and the North Carolina General Statutes.

The County intends to award a contract to the vendor with a solution that most closely meets the requirements defined in their request for proposal (RFP) and the functional requirements Excel spreadsheet. The vendor’s ability to deliver a clear project plan and an approach towards the successful implementation of these services, and offer ongoing support are critical factors in the evaluation and selection process. This request for proposal includes the purchase, implementation, integration, training, project management, and support and maintenance of the system. The County has a preferred go-live date of June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

## **2.0 PROPOSAL INSTRUCTIONS & REQUIREMENTS**

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### **2.1 REQUEST FOR PROPOSAL DOCUMENT**

The RFP is comprised of the base RFP document, any attachments, and any addenda released before contract award. All attachments and addenda released for this RFP in advance of any contract award are incorporated herein by reference. By submitting a proposal, the vendor agrees to meet all stated requirements in this section as well as any other specifications, requirements and terms and conditions stated in this RFP. If a vendor is unclear about a requirement or specification or believes a change to a requirement would allow for the County to receive a better proposal, the vendor is urged and cautioned to submit these items in the form of a question during the question-and-answer period in accordance with Section 2.3.

Proposal Number: RFP #25-32-IT Contract Management Solution

Vendors shall populate all attachments of this RFP that require the vendor to provide information and include an authorized signature where requested. Failure to include required documents and/or signatures, where requested, will result in rejection of submitted proposals.

## 2.2 PROPOSAL SUBMITTAL

Pursuant to Section 143-129.8 of the North Carolina General Statutes, informal proposals for a combination of purchase of goods, design, installation, training, operation, maintenance, and related services are solicited. Proposals, subject to the conditions made a part hereof and the receipt requirements described below, shall be received at the address indicated in the table below.

Mailing address for delivery or proposal via US Postal Service	Office Address of delivery by any other method (special delivery, overnight, or any other carrier)
<p style="text-align: center;"><i>PROPOSAL TITLE:</i></p> <p style="text-align: center;"><b><i>RFP #25-32-IT Contract Management Solution</i></b></p> <p style="text-align: center;">Cumberland County Purchasing Office Attn: Sophia Murnahan PO Box 1829 Fayetteville, NC 28302</p>	<p style="text-align: center;"><i>PROPOSAL TITLE:</i></p> <p style="text-align: center;"><b><i>RFP #25-32-IT Contract Management Solution</i></b></p> <p style="text-align: center;">Cumberland County Purchasing Office Attn: Sophia Murnahan 117 Dick Street 4<sup>th</sup> Floor, Room 451 Fayetteville, NC 28301</p>

**IMPORTANT NOTE:** All proposals shall be physically delivered to the office address listed above ***on or before 2:00 PM EST, Friday, March 28, 2025, regardless of the method of delivery.*** All risk of late arrival due to unanticipated delays – whether delivered by email, hand, U.S. Postal Service, courier or other delivery service is entirely on the vendor. It is the sole responsibility of the vendor to have the proposal to the County department specified by the specified time and date of opening. Any proposal received after the proposal submission deadline will be rejected.

- a) Submit **one (1) signed, original executed** proposal response and one (1) electronic copy on a USB flash drive.
- b) Submit your proposal in a sealed package. Clearly mark each package with: (1) Vendor name; (2) the RFP number; and (3) the due date. Address the package(s) for delivery as shown in the table above. Proposals will be subject to rejection unless submitted with the information above included on the outside of the proposal package.
- c) The electronic copy of your proposal must be provided on a USB flash drive. The files **shall NOT** be password protected, shall be in .PDF or .XLS/.XLSX format, and shall be capable of being copied to other media including readable in Microsoft Word and/or Microsoft Excel. The functional requirements Excel spreadsheet must be saved on the USB flash drive as .XLS and/or .XLSX.

All proposal addendums and/or corrections will be posted on the Cumberland County Vendor Self Service site <https://ccmunis.co.cumberland.nc.us/vss/Vendors/VBids/Default.aspx> . Vendors who submit a notice of intent to bid to [smurnahan@cumberlandcountync.gov](mailto:smurnahan@cumberlandcountync.gov) will receive addendums by email.

## 2.3 PROPOSAL QUESTIONS

Written questions shall be emailed to [CumberlandPurchasing@cumberlandcountync.gov](mailto:CumberlandPurchasing@cumberlandcountync.gov) by **5:00 PM EST, Thursday, March 20, 2025**. Vendors should enter “***RFP #25-32-IT Contract Management Solution: Questions***” as the subject for the email. Questions will not be answered by phone. Question submittals should include a reference to the applicable RFP section.

Questions received prior to the submission deadline date, the County's response, and any additional terms deemed necessary by the County will be posted in the form of an addendum to the Cumberland County Vendor Self Service Site, <https://ccmunis.co.cumberland.nc.us/vss/Vendors/default.aspx> and shall become an Addendum to this RFP. **Vendors who submit an intent to bid will receive addendums by email.** Vendors shall rely *only* on written material contained in an Addendum to this RFP. **Vendors should not contact any other County employees, besides those listed above, during the bid process. Vendors who contact any other County employees may be disqualified.**

Any questions considered minute in nature or that point to an error in the RFP or that the County determines will produce information required in order for all vendors to submit a responsible proposal, may be answered at the County's discretion after the specified date and time. Such questions that are received after the deadline are not guaranteed to be answered and if the questions qualify as "minute in nature" shall be determined at the sole discretion of the County.

## 2.4 RFP TERMS & CONDITIONS

It shall be the vendor's responsibility to read the instructions, the County's terms and conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors also are responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

Questions, issues, or exceptions regarding any term, condition, or other component within this RFP, must be submitted as questions in accordance with the instructions in Section 2.3 PROPOSAL QUESTIONS. Vendor's proposal shall constitute a firm offer.

If a vendor desires modification of the terms and conditions of this solicitation, it is urged and cautioned to inquire during the question period, in accordance with the instructions in this RFP, about whether specific language proposed as a modification is acceptable to or will be considered by the County. It is the County's sole discretion to accept or reject requested modifications and/or exceptions.

## 3.0 NOTICES TO VENDOR

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### 3.1 PROHIBITED COMMUNICATIONS AND CONFIDENTIALITY

**PROHIBITED COMMUNICATION:** Each vendor submitting a proposal, including its representatives, subcontractors, and suppliers, is prohibited from having any communication with any employees or members of the Board of Commissioners of the County except those employees of the County's Department as designated in this RFP. A vendor who does not comply with this provision may be disqualified from award of a contract.

**IMPORTANT INFORMATION! CONFIDENTIAL INFORMATION:** The proposal must not contain any information marked as "confidential" or as a "trade secret" or in any other manner as to indicate that it is information protected by the Trade Secrets Protection Act ( the "Act") as set out in Article 24 of Chapter 66 of the North Carolina General Statutes, **unless the vendor has noticed the County Finance Department of its intent to designate any information in the proposal as such and received permission from the County Finance Department to do so in writing.** Vendor's notice to the County Finance Department must be in writing and must describe the information for which confidentiality is requested and explain how the information is a "trade secret" as defined in G.S. § 66-152(3). If the County Finance Department determines the information for which confidentiality is requested is a "trade secret" covered by the Act, it will notify the vendor how to mark the information in the proposal and will identify the measures that County will take to protect the confidentiality of the information. Vendor's submission of a proposal after receipt of this notice from the County Finance Department shall be deemed to be acceptance of the County Finance Department's statement of how it will maintain confidentiality. If the County Finance Department determines the information for which confidentiality is requested is not a "trade secret" covered by the Act, it will notify vendor of that determination. 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 this section shall be regarded as not responsive to the request for proposals and shall not be considered.

### 3.2 PROPOSAL COMPLIANCE

It is in the best interest of vendors to submit proposals that are clear, concise, and easily understood. Proposals should provide information essential for a straightforward and concise description of vendor capabilities to satisfy the requirements of the RFP specifications.

Vendor may include any optional data not provided for elsewhere and considered to be pertinent to this bid as an addendum.

Vendors are urged and cautioned to read the RFP completely through as noncompliance with requirements may result in bid rejection. Section 4.0 requirements and request for information must be in the same order with the same titles as listed in Section 4.0. Vendor proposals should be easy to follow, and all sections should be easily identified.

The specifications included in this package describe the services that the County feels are necessary to meet the performance requirements of this RFP and shall be considered the minimum standards expected of the Proposer. However, the specifications are not intended to exclude potential bidders.

If the vendor is unable to meet any of the specifications as outlined therein, vendors are advised to submit questions and concerns regarding the specifications during the question-and-answer period described in Section 2.3.

If the vendor does not indicate or submit questions or concerns regarding the specifications, the County shall assume it is able to fully comply with these specifications. The County shall be the sole and final judge of compliance with all specifications.

The County further reserves the right to determine the acceptability or unacceptability of any and all alternatives or deviations.

### 3.3 PROPOSAL EVALUATION PROCESS

The County shall review all responses to this RFP to confirm that they meet the specifications and requirements of the RFP. The County shall not be required to hold interviews; however, depending on the number of responses and the information contained in the responses, the County may decide to conduct interviews with firms of its choice. The County reserves the right to request clarification of information submitted. The highest-ranking vendors will be required to provide a demonstration of the proposed product that is listed within the RFP.

The County reserves the right to reject any and all proposals.

### 3.4 EVALUATION CRITERIA

All qualified proposals will be evaluated based on the following criteria to result in an award most advantageous to the County. *The highest-ranking vendors from this evaluation criteria will be contacted to schedule an on-site and/or virtual demonstration. The award will be made based on the highest ranking after the on-site and/or virtual demonstration.*

- |   |                  |
|---|------------------|
| 1. Responses to the Functional Requirements | 30 points        |
| 2. Customization and Feature Options        | 20 points        |
| 3. Technical Approach                       | 10 points        |
| 4. Relevant Experience and Qualifications   | 10 points        |
| 5. References                               | 10 points        |
| 6. Cost Proposal                            | 20 points        |
| 7. On-Site/Virtual Demonstrations           | <u>20 points</u> |

### **3.5 METHOD OF AWARD**

RFP will be awarded based on best overall value method of award.

The County reserves the right to make separate awards to different vendors, to not award, or to cancel this RFP in its entirety without awarding a contract, if it is considered to be most advantageous to the County to do so.

## **4.0 SCOPE OF WORK & VENDOR'S PROPOSAL CONTENT REQUIREMENTS**

### **4.1 SCOPE OF WORK**

Cumberland County, North Carolina (“the County”) is seeking proposals from qualified vendors to supply a Contract Management System (CMS) to support the County Finance and Legal Department. The goal of the project is to streamline the entire lifecycle of contracts, from creation and negotiation to execution, monitoring, and renewal or termination. The proposed system must incorporate electronic signatures and seamless approval workflows throughout the entire contract process. It is imperative that the County maintain compliance, mitigate risks, improve efficiency by centralizing and automating the management of contractual agreements, improve accessibility, and maximize value. The County has a preferred go-live date of June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

#### **A. OBJECTIVES**

1. Increased Efficiency – Reduce time spent on manual paperwork, approvals, and contract tracking.
2. Cost Savings – Minimize expenses related to printing, mailing, storage, and document retrieval.
3. Faster Contract Turnaround – Speed up contract creation, negotiation, signing, and execution.
4. Improved Compliance and Security – Ensure better adherence to regulatory requirements and secure sensitive data with encryption and access controls.
5. Enhanced Accessibility – Allow stakeholders to access, review, and sign contracts from anywhere, anytime.
6. Better Version Control – Avoid errors from multiple versions and ensure everyone is working on the latest document.
7. Automated Workflows – Streamline approvals, notifications, and reminders to reduce bottlenecks.
8. Reduced Risk of Errors – Minimize manual data entry mistakes and ensure contract accuracy.
9. Enhanced Visibility and Tracking – Enable real-time status tracking and audit trails for improved accountability.
10. Sustainability and Environmental Benefits – Reduce paper usage, contributing to eco-friendly business practices.
11. Optical Character Recognition (OCR) and Artificial Intelligence (AI) – Increase searchability within the database and enhances the contract terminology.
12. External Vendors and/or County Stakeholders Collaboration within the Platform – Allows external vendors to collaborate with the drafting and editing of a contract.
13. Electronic Signatures – Ability to sign legal binding documents with electronic signatures from within the system and provide an evidence summary.
14. Templates Creation – Ability to create and edit templates within the system.
15. External Contracts – Ability to import and edit external contracts from within the system.

#### **B. TASKS**

The task list below includes the desired implementation scope:

1. System configuration and customization to support the County’s contract process.
2. User roles and permissions setup.
3. Security setup.



4. Interface development to include those that are listed within the requested functional requirements Excel spreadsheet.
5. Application training for County Staff. (i.e., Department Administrative, Finance, Legal, etc.).
6. System Admin training for County Innovation and Technology Services (ITS) key staff.
7. Vendor configuration review sessions.
8. Templates, forms, checklists, and workflow creation and validation sessions.
9. Data dictionaries.
10. Entity Relationship Diagrams (ERDs).
11. User Acceptance Testing (UAT).
12. Support reporting requirements.
13. Provide a test and production environment.
14. Optical Character Recognition (OCR).
15. Artificial Intelligence (AI).
16. Provide Application Programming Interfaces (APIs) reference, if available.

## 4.2 VENDOR'S PROPOSAL REQUIREMENTS

The vendor's proposal must include the required information below. Proposals shall be tabbed, using the titles identified in this section, to identify the required information. Tabs must be in the same order as listed below. Failure to submit this information may render its proposal non-responsive. **Vendors are urged and cautioned to read the notices in Section 3.1. Noncompliance with the confidentiality requirements will result in a proposal being considered nonresponsive.**

### A. RESPONSE TO THE FUNCTIONAL REQUIREMENTS

The vendor's proposal shall demonstrate how the proposed solution meets the functional requirements stated in this RFP. **An Excel spreadsheet listing all functional requirements will be attached with this RFP and ALL worksheets within the document must be completed and submitted along with proposal.**

### B. CUSTOMIZATION AND FEATURE OPTIONS

The vendor's proposal shall provide all customization options and features available for the product. The vendor must annotate the additional cost amount next to the corresponding functional requirement cell, if the feature is not already built within the proposed system.

### C. TECHNICAL APPROACH

The vendor's proposal shall include, in narrative, outline, and/or graph form the vendor's approach to accomplishing the tasks outlined in the Scope of Work section of this RFP. A description of each task and deliverable and the schedule for accomplishing each shall be included. The County has a preferred go-live date of June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

### D. RELATIVE EXPERIENCE AND QUALIFICATIONS

The vendor's proposal shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the County of Cumberland.

### E. REFERENCES

Vendors shall provide at least three (3) references for which your company has provided services of similar size and scope to that proposed herein. It is the responsibility of the vendor to ensure the references listed provide the necessary feedback for a completed reference check.

COMPANY NAME	CONTACT NAME	TELEPHONE NUMBER	EMAIL ADDRESS

**F. COST**

Cost shall be all inclusive, to include implementation, support, additional add-on features, and any customized features. Proposal shall list the one-time implementation cost, cost of training, software license, and any recurring costs or fees associated (such as annual support, upgrades, etc.). Vendor shall clearly identify the cost of any monthly and/or annual fees. Vendor must **exclude all sales tax from the proposal**. If discount is available for prompt payment, identify terms so it may be considered in analyzing proposal.

**G. ON-SITE/VIRTUAL DEMONSTRATIONS**

A demonstration will be required by highest-ranking vendors based on the previous evaluation criteria listed. Once proposals are received by the department and evaluated, the department will contact those that ranked highest to schedule a date and time for a demonstration, either on-site or virtual. On-site/virtual demonstrations will be evaluated with the highest-ranking being awarded.

**5.0 CONTRACT TERMS AND CONDITIONS**

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**5.1 IRAN DIVESTMENT ACT**

As provided in N.C.G.S. 147-86.55-69, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the North Carolina State Treasurer pursuant to G.S. 147-86.57(6) c, is ineligible to contract with the County of North Carolina or any political subdivision of the COUNTY.

**5.2 E-VERIFY**

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.

**5.3 DIVESTMENT FROM COMPANIES THAT BOYCOTT ISRAEL**

The CONTRACTOR certifies that it has not been designated by the North Carolina State Treasurer as a company engaged in the boycott of Israel pursuant to N.C.G.S. 147-86.81. It is the responsibility of each CONTRACTOR to monitor compliance with this restriction. Contracts valued at less than \$1,000.00 are exempt from this restriction.

**5.4 CONTRACT CHANGES**

Contract changes, if any, over the life of the contract shall be implemented by contract amendments agreed to in writing by the COUNTY and CONTRACTOR.

**5.5 CONTRACT TERM**

The Contract shall have an initial term of **one (1)** year, beginning on the date of contract award (the “Effective Date”). The CONTRACTOR shall begin work under the Contract within **five (5)** business days of the Effective Date. At the end

of the Contract's current term, the COUNTY shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions.

## **5.6 PRICING**

Proposal price shall constitute the total cost for complete performance in accordance with the requirements and specifications herein, including all applicable charges handling, administrative and other similar fees. CONTRACTOR shall not invoice for any amounts not specifically allowed for in this RFP.

## **5.7 INVOICES**

a) Invoices must be submitted to the following address:

Cumberland County Innovation and Technology Services (ITS)

Attn: Lissa Jones

117 Dick Street, Suite 519

Fayetteville, NC 28301-5749

b) Any applicable taxes shall be invoiced as a separate item.

## **5.8 PAYMENT TERMS**

The CONTRACTOR will be paid net thirty (30) calendar days after the CONTRACTOR'S invoice is approved by the COUNTY.

## **5.9 APPROPRIATION OF FUNDS**

The parties intend that contractual performances by either party beyond the first fiscal year after the execution of this agreement be contingent upon the continued funding and appropriation by the County Board of Commissioners. Therefore, the parties agree that services provided and payment due under this agreement will be provided upon a year-to-year basis contingent upon continued funding and appropriation. The fiscal year for Cumberland County begins on July 1 and ends June 30<sup>th</sup>.

## **5.10 FINANCIAL STABILITY**

CONTRACTOR warrants that it has the financial capacity to perform and to continue perform its obligations under the contract; that CONTRACTOR has no constructive or actual knowledge of an actual or potential legal proceeding being brought against CONTRACTOR that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

## **5.11 INSURANCE:**

Providing and maintaining adequate insurance coverage is a material obligation of the CONTRACTOR and is of the essence of this Contract. All such insurance shall meet all laws of the County of North Carolina. Such insurance coverage shall be obtained from companies that are authorized to provide such coverage and that are authorized by the Commissioner of Insurance to do business in North Carolina. The CONTRACTOR shall at all times comply with the terms of such insurance policies, and all requirements of the insurer under any such insurance policies, except as they may conflict with existing North Carolina laws or this Contract. The limits of coverage under each insurance policy maintained by the CONTRACTOR shall not be interpreted as limiting the CONTRACTOR'S liability and obligations under the Contract. During the term of the Contract, the CONTRACTOR at its sole cost and expense shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the Contract.

## **5.12 GENERAL INDEMNITY**

The CONTRACTOR shall hold and save the COUNTY, its officers, agents, and employees, harmless from liability of

any kind, including all claims and losses accruing or resulting to any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this Contract, and from any and all claims and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the CONTRACTOR in the performance of this Contract and that are attributable to the negligence or intentionally tortious acts of the CONTRACTOR provided that the CONTRACTOR is notified in writing within 30 days that the COUNTY has knowledge of such claims. The CONTRACTOR represents and warrants that it shall make no claim of any kind or nature against the COUNTY's agents who are involved in the delivery or processing of CONTRACTOR goods or services to the COUNTY. The representation and warranty in the preceding sentence shall survive the termination or expiration of this Contract.

### **5.13 ENTIRE CONTRACT**

The contract formally entered into by the parties after the vendor is selected constitutes the entire understanding of the parties. In the event of a conflict between the COUNTY'S contract terms and the CONTRACTOR'S contract terms, the COUNTY'S terms shall be the overriding determining factor.

### **5.14 CONTRACT CANCELLATION**

The COUNTY may terminate this contract at any time by providing 30 days' notice in writing from the COUNTY to the CONTRACTOR. If the contract is terminated by the COUNTY as provided in this section, the COUNTY shall pay for services satisfactorily completed by the CONTRACTOR, less any payment or compensation previously made.

### **5.15 LAWS AND ORDINANCES**

The contract will be governed by North Carolina law.

### **5.16 COMPLIANCE WITH LAWS**

CONTRACTOR shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business and its performance in accordance with this contract, including those of federal, state, and local agencies having jurisdiction and/or authority.

### **5.17 CONTRACTOR REPRESENTATIONS**

CONTRACTOR warrants that qualified personnel shall provide services under this Contract in a professional manner. "Professional manner" means that the personnel performing the services will possess the skill and competence consistent with the prevailing business standards in the industry. CONTRACTOR agrees that it will not enter any agreement with a third party that may abridge any rights of the COUNTY under this Contract.

If any services, deliverables, functions, or responsibilities not specifically described in this Contract are required for CONTRACTOR'S proper performance, provision and delivery of the service and deliverables under this Contract, or are an inherent part of or necessary sub-task included within such service, they will be deemed to be implied by and included within the scope of the contract to the same extent and in the same manner as if specifically described in the contract. Unless otherwise expressly provided herein, CONTRACTOR will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the CONTRACTOR to provide and deliver the Services and Deliverables.

#### **CONTRACTOR certifies that it has not previously or currently:**

- a. Had any criminal felony conviction, or conviction of any crime involving moral turpitude, including, but not limited to fraud, misappropriation or deception, of CONTRACTOR, its officers or directors, or any of its employees or other personnel to provide services on this project, of which CONTRACTOR has knowledge.
- b. Had any regulatory sanctions levied against CONTRACTOR or any of its officers, directors or its professional employees expected to provide services on this project by any governmental regulatory agencies within the past

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three years. As used herein, the term “regulatory sanctions” includes the revocation or suspension of any license or certification, the levying of any monetary penalties or fines, and the issuance of any written warnings.

- c. Had any civil judgments against CONTRACTOR during the three (3) years preceding submission of its proposal herein.

Any personnel or agent of the CONTRACTOR performing services under any contract arising from this RFP may be required to undergo a background check at the expense of the CONTRACTOR, if so requested by the COUNTY.

The COUNTY may, in its sole discretion, terminate the services of any person providing services under this Contract. Upon such termination, the COUNTY may request acceptable substitute personnel or terminate the contract services provided by such personnel.

**Attachments to this RFP begin on the next page.**

## **ATTACHMENT A: INSTRUCTIONS TO VENDORS**

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1. **READ, REVIEW AND COMPLY:** It shall be the vendor's responsibility to read this entire document, review all enclosures and attachments, and any addenda thereto, and comply with all requirements specified herein, regardless of whether appearing in these Instructions to vendors or elsewhere in this RFP document.
2. **LATE PROPOSALS:** Late proposals, regardless of cause, will not be opened or considered, and will automatically be disqualified from further consideration. It shall be the vendor's sole responsibility to ensure delivery at the designated office by the designated time.
3. **ACCEPTANCE AND REJECTION:** The County reserves the right to reject any and all proposals, to waive minor informality in proposals and to reject proposal with non-minor informalities, based on the sole discretion of the County.
4. **EXECUTION:** Failure to sign EXECUTION PAGE in the indicated space will render proposal non-responsive, and it shall be rejected.
5. **GIFTS:** Gifts and favors to the County of any kind in any amount are prohibited.
6. **SUSTAINABILITY:** To support the sustainability efforts of the County of Cumberland we solicit your cooperation in this effort. All copies of the proposal are printed double-sided.
7. **HISTORICALLY UNDERUTILIZED BUSINESSES:** Pursuant to General Statute 143-48 and Executive Order #150 (1999), the County invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled.
8. **INFORMAL COMMENTS:** The County shall not be bound by informal explanations, instructions or information given at any time by anyone on behalf of the County during the competitive process or after award. The County is bound only by information provided in this RFP and in formal Addenda issued through the State's IPS and the County's Vendor Self Service website.
9. **COST FOR PROPOSAL PREPARATION:** Any costs incurred by vendor in preparing or submitting offers are the Vendor's sole responsibility; the County of Cumberland will not reimburse any vendor for any costs incurred.
10. **VENDOR'S REPRESENTATIVE:** Each vendor shall submit with its proposal the name, address, and telephone number of the person(s) with authority to bind the firm and answer questions or provide clarification concerning the firm's proposal.
11. **SUBCONTRACTING:** The Contractor shall not assign or subcontract the work, or any part thereof, without the previous consent of Cumberland County, nor shall it assign, by power of attorney, operation of law, or otherwise, any moneys payable under the Contract without prior written consent of the County.  
  
If the vendor proposes to subcontract work in this project, the subcontractor and the activity in this project are to be identified in the proposal.  
  
All subcontractors must be approved by the County and must conform to and comply with the same terms, standards and specifications applicable to the contracting firm.  
  
The vendor shall be fully responsible and accountable to the County for the acts and omissions of its subcontractors, and of persons directly or indirectly employed by him.
12. **INSPECTION AT VENDOR'S SITE:** The County reserves the right to inspect, at a reasonable time, the

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equipment/item, plant or other facilities of a prospective vendor prior to Contract award, and during the Contract term as necessary for the County determination that such equipment/item, plant or other facilities conform with the specifications/requirements and are adequate and suitable for the proper and effective performance of the Contract.

13. **AFFIRMATIVE ACTION**: The vendor will take affirmative action in complying with all Federal and County requirements concerning fair employment and employment of people with disabilities, and concerning the treatment of all employees without regard to discrimination by reason of race, color, religion, sex, national origin or disability.
14. **VENDOR REGISTRATION**: Vendors are not required to register as a vendor in our system in order to submit a bid; however, registration is recommended so that vendor information is available for future opportunities. New vendors can register by visiting the following URL: <https://ccmunis.co.cumberland.nc.us/vss/Vendors/default.aspx>.

*This Space is Intentionally Left Blank*

## **ATTACHMENT B: EXECUTION OF PROPOSAL**

### **EXECUTION**

In compliance with this Request for Proposal (RFP), and subject to all the conditions herein, the undersigned vendor offers and agrees to furnish and deliver any or all items/services upon which prices are proposed. By executing this proposal, the undersigned vendor certifies that this proposal is submitted competitively and without collusion, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible from covered transactions by any Federal or State department or agency. Furthermore, the undersigned vendor certifies that it and its principals are not presently listed on the Department of State Treasurer’s Final Divestment List as per N.C.G.S 147-86.55-69.

The potential Contractor certifies and/or understands the following by placing an "X" in all blank spaces:

\_\_\_\_\_ The County has the right to reject any and all proposals or reject specific proposals with deviated/omitted information, based on the County’s discretion if the omitted information is considered a minor deviation or omission. The County will not contact vendors to request required information/documentation that is missing from a proposal packet. Additionally, if the County determines it is in its best interest to do so, the County reserves the right to award to one or more vendors and/or to award only a part of the services specified in the RFP.

\_\_\_\_\_ This proposal was signed by an authorized representative of the Contractor.

\_\_\_\_\_ The potential Contractor has determined the cost and availability of all materials and supplies associated with performing the services outlined herein.

\_\_\_\_\_ All labor costs associated with this project have been determined, including all direct and indirect costs.

\_\_\_\_\_ The potential Contractor agrees to the conditions as set forth in this RFP with no exceptions.

\_\_\_\_\_ Selection of a contract represents a preliminary determination as to the qualifications of the vendor. Vendor understands and agrees that no legally binding acceptance offer occurs until the Cumberland County Board of Commissioners, or its designee, executes a formal contract and/or purchase order.

Therefore, in compliance with the foregoing RFP, and subject to all terms and conditions thereof, the undersigned offers and agrees to furnish the services for the prices quoted within the timeframe required. Vendor agrees to hold firm offer through contract execution.

**Failure to complete, execute/sign (E-signature or handwritten) proposal prior to submittal shall render the proposal invalid and it WILL BE REJECTED.**

VENDOR:		
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & COUNTY & ZIP:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #10):		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:	FAX NUMBER:	
VENDOR’S AUTHORIZED SIGNATURE:	DATE:	EMAIL:



**ATTACHMENT C: CERTIFICATION OF FINANCIAL CONDITION**

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Name of Vendor: \_\_\_\_\_

The undersigned hereby certifies that: [check all applicable boxes]

The vendor is in sound financial condition and, if applicable, has received an unqualified audit opinion for the latest audit of its financial statements.

Date of latest audit: \_\_\_\_\_

The vendor has no outstanding liabilities, including tax and judgment liens, to the Internal Revenue Service or any other government entity.

The vendor is current in all amounts due for payments of federal and County taxes and required employment-related contributions and withholdings.

The vendor is not the subject of any current litigation or findings of noncompliance under federal or County law.

The vendor has no findings in any past litigation, or findings of noncompliance under federal or County law that may impact in any way its ability to fulfill the requirements of this Contract.

He or she is authorized to make the foregoing statements on behalf of the vendor.

**Note:** This is a continuing certification and vendor shall notify the Contract Lead within 15 days of any material change to any of the representations made herein.

**If any one or more of the foregoing boxes is NOT checked, vendor shall explain the reason in the space below:**



\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name Title

**[This Certification must be signed by an individual authorized to speak for the vendor]**



**Previous RFP Questions & Answers Incorporating Changes to RFP  
Questions & Answers  
(County responses and changes are in red)**

**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?

The County's preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

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?

The County's preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

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 early to mid April 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?

The County's preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

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 #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 #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 #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?

The County's preferred go-live date is June 30, 2025, but if you cannot meet this deadline, please provide your proposed implementation timeline.

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

Late April to early May for kick-off and the County's preferred go-live date is June 30, 2025. If you cannot meet this deadline, please provide your proposed implementation timeline.

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.