



## **REQUEST FOR INFORMATION (RFI) 2017-130**

### **KITSAP COUNTY DEPARTMENT OF ADMINISTRATIVE SERVICES NOTICE TO CONSULTANTS FOR CONTRACT MANAGEMENT SOFTWARE**

**RESPONSE DEADLINE: Thursday, May 18, 2017 @ 3:00 p.m.**

Kitsap County Department of Administrative Services is soliciting information from qualified vendors relating to Enterprise Contract Management Software to service the County contract's processing.

The purpose of this Request for Information (RFI) is to gather information regarding possible solutions that address the needs discussed within this RFI. This is not a solicitation to purchase services and/or goods. No contract will be awarded based on the responses to this RFI. However, depending upon knowledge gained from the response to this RFI, it is Kitsap County's intent to take the next steps required for procurement of technology or services.

#### **PROJECT DESCRIPTION**

Kitsap County is responsible for the creation, execution, and monitoring of contracts with outside entities. A contract management solution is being sought to support contract creation through execution phase of the contract lifecycle. A solution that provides tools for contract monitoring will also be considered.

Currently, Kitsap County uses SharePoint lists, MS Word templates and MS Excel spreadsheets to create, email for notifications, SharePoint to route for review and route for approval most of its contracts. The County contracts process seeks to improve the identification of clear timelines, improve visibility of process step completion, standardize revision documentation and communications during the creation and review steps, and implement digital signatures for both internal and external parties.

## REQUIREMENTS

### *Process Transparency and Comment Tracking*

Essential functions desired ability to track status and time in status throughout the process. The solution should generate and track work activity based on created date, contract type, review start/complete date, number of reviews for each review group, etc. Data export or direct access to data via Analysis Services or SQL reporting is needed to create operations dashboard, or a comprehensive, easy to use, and customizable dashboarding feature is required. A contract management solution must be able to easily track comments, revisions and versions of a contract in a central location. The ability to integrate emails into this central location is desired.

### *Contract Build*

A contract management solution will be able to build a contract through clause based questions. It should have a library for contract templates, terms and conditions, and clauses. Application administrators should be able to update and track templates, terms and conditions, and clauses without technical skills of an IT programmer. The contract management solution should assign a contract number based on execution date of the contract in a pre-defined formation without errors or duplications.

### *Routing*

A contract management solution should have rules based routing for review and approval that can be managed by an application administrator. This should provide for or allow custom (ad-hoc) routing when appropriate.

### *E-Signatures*

A contract management solution will provide for electronic signatures. The electronic signatures technology must be in compliance with the Washington State Electronic Authentication Act and in conjunction with local code and policies regarding the use of electronic signatures.

### *Technology Requirements*

A contract management solution must be able to:

- Be scalable: Meet usage demands of up to 300 number of users with less than 3 second response time.
- Utilize current Word document and PDF formats
- Provide audit logging of user logins and edits
- Export contracts and associated metadata

- Comply with standard security protocols to prevent data loss or tampering
- Be compatible with the current version of Internet Explorer and MS Edge
- Provide integration with SharePoint 2013/2016 for an on-premise or O365 solution or provide a cloud SaaS solution
- Support storage for 1000 number of contracts per year for 2 years
- Annual or API to Recording application for permanent retention
- API for data access or extending functionality

## **VENDOR RESPONSES**

### *Company Background*

Vendors shall provide the following company background information:

1. Size
2. Location
3. Number of years in business
4. Number of employees
5. Peer group installations for comparison
6. Installation references with contact information
7. Support hours of operation and methods used (phone, chat, web etc.)

### *Executive Summary*

Vendors shall provide an executive summary written in non-technical language to summarize the overall capacity and recommended approaches for a Contract Management solution, based on the needs described in this RFI.

### *System Functionality*

Vendors should describe anticipated implementation strategies for a Contract Management solution meeting the County's needs, including a recommended rollout strategy and potential project plan indicating timeframes for phases, as well as the entire project.

### *Recommended Solution*

Vendors should provide detailed information on their proposed solution(s). The information should include recommendations taking into consideration the County's existing processes, data management methods, and system requirements. Describe how your solution would satisfy the County's needs based on provided background information, requirements, current processes and recommended implementation strategies.

### *Cost*

Vendors should respond with typical costs for similar implementations. Typical costs should be broken down for software procurement, implementation, maintenance and support, and other system and business costs (i.e., hardware, application software licenses -initial and on-going, third party licenses, etc.). If the

proposed solutions are modular in nature, please provide typical costs for each module offered. Describe any suggestions for opportunities to reduce costs for this project.

### *Vendor Questions*

Vendors should specifically respond to each of the following questions:

1. Identify which specific functional requirements, described in this RFI, can be addressed by your product. Explicitly flag any requirements that cannot be met or that would be cost prohibitive.
2. Describe system functionalities that your product provides that Kitsap County has not listed, but should be a consideration.
3. Describe how your system integrates historic data from management systems operated prior to the launch of the system (i.e., is there a data migration process to move data to the new system or is the recommendation to leave the previous system operational to support data integration?) and describe the anticipated complexity of this effort.
4. Describe architecture used to develop and host your application. Describe programming languages, application layer, database layer, web services layer.
5. Describe your company's approach to software revisions, updates and patching.
6. What is your change management process for on-premise vs hosted (cloud)?
7. For on-premise solution describe any limitations or negative implications from utilizing vmware virtualization for server resources.
8. Assuming cloud solution, describe your system methods to acquire/download system data for analysis and reporting.
9. Describe data conversion issues with your product typically encountered with installation, man-hours to complete, and database/data resolution based on prior system conversions.
10. Describe staffing plan to implement, train, support and administrate your proposed solution. Identify key roles and responsibilities. Include both vendor and County resources.
11. Describe your system methods used to attach and store files.

12. Describe the security architecture used by your system, including user account access control, log in and password requirements.
13. Describe your systems capability to utilize mobile devices for data creation, attribute read and update activities in connected and disconnected environments.
14. Describe how your system tracks status, process time, and contract metadata.
15. Does your system include 24/7 customer service operation to minimize downtime. This system will be considered critical for County services and response.
16. How are customers managed within your system? Can they be classified internal? External?
17. How are requests for service managed within your system? How configurable is this functionality? How are duplicate requests managed?
18. Is your product scalable (i.e. if you have multiple modules/components, can they be used independently)?
19. To what extent is your solution customizable and what level of skill and training is required to do so?

This RFI is designed to provide vendors with the information necessary for the preparation of informative responses. This RFI process is for Kitsap County's benefit and is intended to provide information to facilitate the future selection of goods and services. The RFI is not intended to be comprehensive and each vendor is responsible for determining detail of response. Vendors may be requested to demonstrate their Contract Management product at a Kitsap County facility.

Kitsap County assumes no financial responsibility in connection with the vendors' costs incurred in the preparation and submission of the RFI packets, nor shall it constitute a commitment, in any way. Kitsap County reserves the right to cancel this RFI if it is deemed in the best interest of the County to do so.

Kitsap County will treat all information submitted by a vendor as public information unless the vendor properly requests that the information be treated as confidential at the time of submitting the response. Any requests for confidential treatment of information must be stated within the executive summary in the vendor's RFI response. The request must also include the name, address, and telephone number of the person authorized by the vendor to

respond to any inquiries concerning the confidential status of the materials. Each page shall be marked as containing confidential information and must be clearly identifiable to the reader.

Please submit one (1) original and one (1) copy by **THURSDAY, MAY 18, 2017 3:00 PM.** Faxes, emailed and late response will not be accepted. Information may be delivered to the addresses below:

**By Mail**

Colby Wattling  
Kitsap County Department of  
Administrative Services  
Purchasing Office  
614 Division Street MS-7  
Port Orchard, WA 98366

**OR**

**Express, Courier, or Hand delivery**

Colby Wattling  
Kitsap County Department of  
Administrative Services  
Purchasing Office – Fourth Floor  
619 Division Street  
Port Orchard, WA 98366

Tentative Schedule:

- Review Submissions: May 19 – June 23, 2017
- Vendor Demos: May 19 – May 26, 2017
- Vendor Selection: June 26 – June 30, 2017

Any questions regarding this RFI should be directed to Mary Collins, EPA, 360-337-4662, or [mlcollins@co.kitsap.wa.us](mailto:mlcollins@co.kitsap.wa.us)

Persons with disabilities may request that this information be prepared and supplied in alternate forms by calling collect 360-337-5777 or TTY 360-337-5455.

The recipient, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all consultants that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 23 will be afforded full opportunity to submit qualifications in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award.

## Appendix A

Placing a “Y” in the Core column indicates that the functions are contained in the core system. Placing a “Y” in the Custom column indicates that a custom modification will be required. Placing a name in the “3<sup>rd</sup> Party” column indicates that the function(s) will be provided by the 3<sup>rd</sup> Party software named.

Contract Management	Core	Custom	Named 3 <sup>rd</sup> party
Ability to generate unique contract numbers in a pre-defined format.			
Ability to track the contract is in each status or phase of the process from submitted for review to final signature.			
Ability to use clause based data to create a contract.			
Ability to identify and store multiple contract types (i.e. templates).			
Ability to store, manage, extract from, and edit contract terms and conditions (i.e. terms and conditions library).			
Ability to run pre-defined review and approval workflows.			
Ability to run custom review and approval workflows.			
Ability to store all comments and notes during the creation, review, and approval phases.			
Ability to track email comments during the creation, review, and approval phases with no more than 2 clicks.			
Ability to link templated and custom attachments (Exhibits) to contracts.			
Ability to select contract template based on data entered by user.			
Ability to query and filter all fields within the system for quick reporting.			
Ability to develop customized reports and queries.			
Ability for electronic signatures for internal participants (County employees) per the Washington State Electronic Authentication Act.			
Ability to support secure electronic signatures for external participants per the Washington State Electronic Authentication Act.			
Ability to restrict access, or permissions based on user roles and responsibilities.			
Ability to develop thresholds trigger.			
Ability to export contract data, including metadata, to County’s records application.			
Ability to track vendors and vendor details such as contact information, licenses, insurance certificates			
Ability to track insurance certificates on a contract and vendor basis.			
Ability to verify bond and licensing status of vendors.			