Finance Department
Purchasing Division

REQUEST FOR INFORMATION (RFI)
Specification No. 22-11528
FOR
Paperless Contract Software Solution
PROPOSALS WILL NOT BE OPENED AND READ PUBLICLY

ADDENDUM "B"
June 29, 2022

Dear Proposer:

Questions received from proposers along with answers are attached.

Proposals/bids must be received no later than 2:00 pm, on <u>Thursday, July 7, 2022.</u> All responses should be sent via email to <u>purchasing@cityofberkeley.info</u> and have "**Specification No. 22-11528: PAPERLESS CONTRACT SOFTWARE SOLUTION**" indicated in the subject line of the email. Please submit one (1) PDF of the technical proposal.

Proposals will not be accepted after the date and time stated above.

We look forward to receiving and reviewing your proposal.

Sincerely,

Darryl Sweet
General Services Manager

Questions and Answers for Specification No. 22-11528
PAPERLESS CONTRACT SOFTWARE SOLUTION

The City of Berkeley has received questions from some potential respondents regarding **Specification No. 22-1158**, Paperless Contract Software Solution. In an effort to provide the same information to all, listed below are the questions received to date, with responses from City staff.

1. **Q.** **(Requirement #2: Provide the solution for working with the third party to draft, edit, and finalize these contract documents electronically.)**
Please provide details as to how you would like the interaction to take place, i.e. will there be a draft document in word format that goes back and forth through email or would you like to have a working site similar to Box.com for the different parties to access to download and upload the document?

1. **A.** These details are not fully known. For the RFI, provide your firm's solution(s).

2. **Q.** (Requirement #3: Provide an automated workflow solution that ensures both internal and external (vendor) stakeholders are able to sign documents electronically utilizing verifiable e-signature capture tool.)
Question: Please confirm if you are interested in the solution to integrate with one of the common e-signature tools, i.e. DocuSign or Adobe E-signature? If so, which of the E-signature tools will you be using?

2. **A.** Exact e-signature tool is not known but is part of the desired ultimate solution.

3. **Q.** (Requirement #5: Provide the solution that will integrate with Tyler MUNIS Financial Software.)
Question: Please describe the level of integration you would like to see with Tyler MUNIS, i.e. are you looking for the system to pull data from MUNIS reports, make data available for MUNIS to ingest or something else? In either case, is there a MUNIS system administrator who can provide access to the data interface?

3. **A.** Ideally the solution would provide a direct integration (API) between the solution, Tyler MUNIS and OnBase Unity Records Management System to retrieve files using metadata. For the purposes of this RFI, provide the City your firm's capabilities related to this requirement.

4. **Q.** **How many users do you expect for the platform?**
4. **A.** Since there is no element of pricing being requested in this RFI, COB has not identified that number at this time.

5. **Q.** **How many Admin, Requesters, Operations, Legal, External Users, Approvers, Business People, etc.?**
5. **A.** Since there is no element of pricing being requested in this RFI, COB has not identified the breakdown of the roles at this time.

6. **Q.** **For a pricing proposal, can you share how many employees will need access to a Contract Management by the departments listed from your website below?**

We can include calculated costs with user numbers for Admin (Workflow Builders),

Standard (workflow requesters) and Viewer Licenses + an implementation cost. We will include the price book for your team to do your own math as well. Any context on all the teams using the tool would be so helpful!

6. A. This RFI is not seeking pricing. We are seeking to learn more about what systems are in the marketplace and how they can help create a dynamic paperless contract workflow solution.

7. Q. I was just alerted to this RFI by one of my contacts at the City of Berkeley who is interested in purchasing another part of our platform. Given the short timeline for response from now until the RFI due date, is there any chance you could extend the deadline for our submission?

7. A. Yes, both deadlines were extended; Q&A deadline was extended to 6/23/22 and the RFI submissions is extended to 7/7/22.

8. Q. How many users does the City anticipate using the system?
   a. Of these users, how many would require creating and editing abilities?
   b. How many users would be read only/approvers?

8. A. See response to Question 6.

9. Q. What percentage of the City's contracts are on third party paper?

9. A. That has yet to be determined, but we are interested to hear about how vendors could facilitate third party documents to allow review/editing to include the back-and-forth nature during contract negotiations and contract development.

10. Q. If the contracting solution includes a contract repository for executed documents, will an integration to OnBase still be required?

10. A. Yes.

11. Q. Do you have an ideal timeline for release of an RFP and implementation of a solution?

11. A. General timeline is to accomplish this in fiscal year 2023.

Except as provided herein all other terms and conditions remain unchanged.