ADDENDUM NO. 2

December 6, 2019

RE: RFP 027.20.B5, Contract Management Solution

FROM: Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644

TO: PROSPECTIVE BIDDERS

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this and all Addenda. Acknowledgement shall be by an authorized signatory on Acknowledgement of Receipt of Addenda Form.

1. **INSERT** Questions and Answers – December 6, 2019

	Questions	Answers
1	Please provide some additional details regarding: A. Total number of users requiring access to the platform. B. Total number of users by type 1) Administrator(s) 2) Full access 3) Approvers 4) Read Only 5) Requestors	Initially there will be between 10- 12 static users. As new contracts are being developed the number may fluctuate due to employees that will have assigned roles in their division's contract process. It may be up to anoter15 employees at any given time, however they may not have permanent roles. 1) 3 2) 5 3) 10-15 5) numbers may fluctuate
2	Is the Data Integration requirement with Workday and two way integration?	Yes, HCPSS requires two-way integration with Workday
3	Has a budget been set for this project and if so how much?	A budget has not been established
4	2.1 Can you expand on the type of collaboration features you wish to see in the platform?	Between any stakeholder from RFP development through Contract expiration.
5	2.4 Enable meta-data analysis. Can you explain what you are referring to here, perhaps an example would help?	Data that differentiates information allowing that information to further be identified, discovered, distributed, tracked and/or stored appropriately
6	3.9.1.1 search functionality with abstract and auto complete search. Is this a mandatory requirement?	Preferred
7	3.9.4 access restrictions to support internal and external (public) users. Is HCPSS looking for a public portal? What data do you want the public to have access to?	Yes, HCPSS would like a public portal, but with admin/security to filter/control specific aspects of the access.
8	3.9.5 text and SMS alert notifications. Is this mandatory requirement?	At least one feature is mandatory

	Questions	Answers
9	3.9.7 Please elaborate on how compliance to internal, external, state and federal compliance will be managed?	Since the HCPSS is a public entity, HCPSS have fiduciary responsibility to ensure HCPSS policies, COMAR and federal regulations are adhered to.
10	3.22 How many different lines and or specified permissions require to be configured?	To be determined in implantation phase of project
11	3.24 Data Conversion functions that manage: 3.24.1 Conversion Methods. Can you elaborate on this or provide an example?	Method of converting data so that it may be uniformly stored appropriately in objects such as text data, numbers, money, dates, etc.
12	3.24 Data Conversion functions that manage: 3.24.2 Conversion Process. Can you elaborate on this or provide an example?	Process of converting data so that it may be uniformly stored appropriately in objects such as text data, numbers, money, dates, etc.
13	3.25 Data Validation. Can you elaborate on this and provide examples. Is this on such items as phone numbers?	To control what a user can enter into a field or cell.
14	Contract types- what types of contracts will the system support? Outsourcing, leases, real estate, HR, IT, etc.	The resulting solution shall support all agreements made on behalf of the school system.
15	Will you run the system internally or do you want it hosted?	Hosted
16	Is contract authoring and workflow part of the scope? Do you have/want a clause library and Contract document templates?	Yes. HCPSS would like a workflow/approval process. Yes HCPSS would like a template format and clause library to build/add to the template
17	How are contracts created and approved now? How and where are they stored? In what formats?	Contract creation varies from simple agreements between a school and a party to complex agreements, MOUs between entities,
18	How many contracts are on your paper vs third party paper?	Could be thousands – all with various terms, expirations, etc.
19	How many contracts/documents /users will the system support?	The preferred would be unlimited, but the estimate would be 5,000
20	Are users in one place or distributed?	Distributed
21	How many users of the system, and what general roles will they have?	See question #1
22	Will there be any interfaces to your contract system? If so, what systems and what data/functions will be interfaced?	Workday, eMMA, Outlook
23	What are the current contract issues/pain you are trying to address? Deadlines, last of obligation visibility, access to contract documents, need for proactive alerts, inconsistent contract language, etc?	Yes. HCPSS is trying to streamline the process with the items mentioned in your question. HCPSS is looking to improve our processes, have continuous workflow, dashboard for status checks, notifications for process flow- email capabilities, templates for: contracts, insurance and data privacy agreements, one stop for data collection of new, current and previous contracts, connection to budget/financials of contract, ease of uploading RFP documents to the eMMA
24	Is the project budgeted or are you just doing research? What is your timeframe for implementing?	See #3 above for the budget. This is a new initiative so the timeframe would be a joint effort between HCPSS and the awarded contractor. Of course specific milestones will be established and need to be met.
25	What ERP/financial systems do you have?	Workday
26	Do you have a sourcing system currently? If so, which one?	No
27	What software do you use for Email?	Outlook
28	What version of MS Word is being used?	Office 365
29	We have never had a requirement for Builders Insurance? How does this apply to a Software	Not required for resulting contract

	Questions	Answers
	agreement, or is it not required for this Proposal/contract?	
30	What is the as is solution currently being used for contract management at HCPSS?	HCPSS has no configured solution
31	Are there any specific functional requirement for pre and post-contract phase in the end-to-end purchase flow other than the Contract Lifecycle Management?	Ability to post RRFP/RFI's to eMMA. Notifications of contract end dates(sunset dates)
32	Can you please give more details on the shared platform requirements?	See below
33	In your current contract management process, do you use templates for contracts?	Yes although, provided what is offered, HCPSS is open to updating as required.
34	Do you currently use Salesforce platform at HCPSS?	No
35	Would you be open to pricing for the contract management system to be hosted by vendor (SaaS/cloud) or deployed on your organization's server (on-premise)?	See question #15
36	Can you please confirm the number of total users will require log-on access to add contracts, edit, delete, approve, search, etc.?	See question #1
37	Can you please expand upon the data migration / importing details for the Contract Management Software?	Broadly migrating existing data from paper, spreadsheets, reports, Workday, etc.
38	Can you please provide details about the columns/fields are currently tracked in the current/legacy system?	HCPSS does not currently have a legacy system
39	How many total electronic Records (rows in excel spreadsheet) and how many total electronic files in current/legacy system?	Not available
40	How many total legacy (historic) electronic contract files will be imported into the Contract Management Solution?	TBD as this is not the primary goal of utilizing new CM software.
41	Where are the legacy (historic) electronic contract files currently stored (shared folders, Sharepoint, document management system, paper, etc.)	On a computers, servers, Office 365 (Sharepoint), paper copies in file cabinets, etc.
42	Can you please expand upon your preferences to integration with third-party systems? Please provide system details (system name, database used, home-grown or commercial) if applicable. Will this be an ongoing data integration or a one-time data import?	Workday is our human capital management and financial platform. HCPSS also interface with eMMA for RFP/RFI submittals.
43	What data will your organization be passing in the data integration between the Contract Management Solution and other third-party systems?	Data associated with RFPs, bids, existing contracts
44	Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?	HCPSS's ERP system (Workday) is a hosted SaaS application.
45	What agreement types would you like to author within the system (number of templates)?	TBD
46	Can you please provide additional details about your organization's workflow/approval processes? Can you please provide number of steps and examples?	See below chart

	Questions	Answers
47	[*For GSA eligible organizations*] Is your organization eligible to purchase off of the GSA Schedule 70? If yes, would you like GSA pricing in the bid response or retail pricing?	Yes. Responders may offer pricing from other publicly bid and awarded contracts. Please identify the agency, agency contact information, and contract name and number.
48	How Does HCPSS currently manage contracts?	Shared drives on server and Sharepoint
49	3.5 "An approval process with notifications, reminders and controls" 　　a)　Please describe within which parts of the contracting process would approvals be needed	See below chart
51	3.6 "Workflow dashboards that allow users to see the process stage" 　　a)　Can you please elaborate on this requirement and/or provide a use case?	See below chart
52	3.9.3 "E-signature Authorizing" 　　a)　Typically, with a Contract Management system, E-signatures and approvals for sign-off are not included within scope, as the Contract Authoring and Creation process are done outside the system, and once the contract is finalized, the system should be utilized to manage all of the contract's data, dates, documents, etc. As there is a key distinction between Contract Management and Contract Authoring, we need to know if HCPSS is seeking contract authoring/creation module in addition to standard Contract Management Features (tasks, notifications, repository, performance management).	Yes
53	3.18.1. Ability to display organizational cascading goals, i.e. individual, team, department, organizational. 　　a)　Can you provide more information or specific examples on how you envision this in the software?	By utilizing a dashboard, users will see the process flow and know where the contract is in the process. (Such as creation, legal, finance, data privacy, insurance, Board approval, etc.)
54	3.20. Functions for users to save information and to return later to complete and/or update applications (auto save preferred). 　　b)　Can you further elaborate on this requirement?	HCPSS wants to ensure that our work is auto saved, and you can return to your place in the development or process without losing valuable work.
55	3.24. Data Conversion functions that manage: 　　a)　3.24.1.Conversion Methods	--
	a)　3.24.2.Conversion Process	--
	b)　3.24.3.Data Extraction	--
	c)　3.24.4.Scheduling	--
	d)　3.25. Data validation 　　　　1)　Is HCPSS looking for a Data Conversion plan in regards to these requirements (3.24 – 3.25)? If not, can you please clarify what is desired here?	See Questions 11, 12, 13

	Questions	Answers
56	Evaluation: Can HCPSS provide exact weights to the categories/criteria listed in the evaluation table in Section 5?	Each item relates to the other. HCPSS are looking for process improvement, thus saving staff time and ensuring all key documents are included in our contracts.
57	Has this project been budgeted? If so what is the budgeted amount?	TBD
58	Would HCPSS like to import all active and historical contracts?	TBD
59	How many estimated users would HCPSS have?	See Question 1

60	Could you provide a breakdown of the users by type required for the contract management system?
	    a) Contract Management Standard Users __
	    b) Contract Management End Users __
	*Where Standard Users have the ability to create and manage records and edit other user's records and End Users have a more limited user interface with fewer privileges and more typically thought of as a read-only type user; could be external to HCPSS
		See Question 1

61	What is the estimated cost of the Contract Management Solution project?	TBD
62	Has the Department allocated funding for the Contract Management Solution yet? If so, through which source (budget, CIP, state/federal grant, etc.)?	No. There is a placeholder in next year's budget to be presented to and approved by the BoE.
63	How is the Department currently meeting this need?	Manual process, using a shared drive
64	Which vendor provides the incumbent Contract Management Solution?	No incumbent
65	Would it be possible to name the three greatest challenges the Department is having with their current solution?	Cumbersome, labor intensive, no notification process other than staff emailing one another.
66	Who is the technical contact and/or project manager for the Contract Management Solution?	TBD
67	Which operating platform does the Department currently use?	Office 365
68	Which operating platform is desired for the Contract Management Solution?	No preference
69	Which other systems will have to integrate/interface with the Contract Management Solution, and will the State provide incumbent vendors for each system?	Workday and eMMA. Second part of your questions in not clear.
70	What is the number of users anticipated for the Contract Management Solution?	See Question 1
71	Could you please tell me how many folks would be using the system? How many power users, how many view only/standard users?	See Question 1
72	How many contracts you have today?	Question is not clear.
73	How much spend under management you have today?	Question is not clear.
74	Is HCPSS open to a private cloud as opposed to SaaS?	No
75	What is HCPSS's implementation timeline?	Within HCPSS FY2021.
76	How many users are anticipated using the system, both internal and external?	Internal, see Question 1.
77	What kind of printers/printer drivers is HCPSS currently using?	Numerous. Provide what your firm supports in your response to the RFP.

	Questions	Answers
78	Will HCPSS accept exceptions to the contract language/terms?	Bidders may take exceptions. HCPSS has the sole right to accept or reject exceptions to the RFP.
79	Will HCPSS agree to our cloud subscription agreement if they go with public cloud?	Question is not clear.

	Project List Created	Committee Meeting/Dept. Formats Job/SVCS/Supplies needed	Purchasing receives formal request for Job/SVCS Supplies.	Purchasing Merges Bid Specifications with Template Documents to Create Draft Bid	Bid Packet goes back to requestor for review	Purchasing Posts/Releases Approved bid	Scheduled prebid held	Bid questions from Interested Suppliers	Answer Questions from Bid	Bid Addendum and/or post Questions	Bids opened	Updated Web page	Bid Cancellation and/or Start Over	Office/Dept. Recommends Bid Selected	Verify MBE and Bid Bond information	Create Bid Tab and Post to Web page	Notify Bidder	Bidder defaults	Purchasing creates Board Approval sheet & Blue cover sheet for signatures	Board receives bid recommendation documents one week prior to BOE meeting	New Process: Board submits questions to Purchasing for clarification of request	Before the new collaborative process questions/answers went before the Board at a	Contract Awarded and entered into Contract Management System	Contract not approved by BOE.	Contract ratified
Task																									
									Extends timeline				Extends timeline				New Process → Data Governance Review/Privacy		Extends timeline		1 Week-Ideal is 2 weeks	1 day - 1 Week	Extended Board meeting 1-2 hours. Staff attended to answer on the		Process may start over	
		New Process →	Data Governance Review/Privacy	Bid (window) →													10 days →	20 days							
Process	Dept.'s and offices create project timeline. Purchasing works with requesting Office/Dept. regarding the development of need and specification	Dept. email request for Bid Commitment	Purchasing receives Bid Commitment Form communicates with Dept. for specifications	Existing contracts may take less time but may need tweaking	Requestor/Dept. reviews/approves			Hard stop after 1 week(closed)	Forward questions to Requestor/ Dept. This process may necessitate a redesign.	Issue addendum prior to bid opening.			Explanation to the BOE as to why bid is cancelled. Process may start over for this request. May receive feedback from bidders as well.		Verify information kept in Purchasing office		Bidder has 10 days from opening to ensure all MBE, C&D information, outreach and availability certificate is in place.	Next lowest bidder is contacted. Bidder has 10 days from opening to ensure all MBE, C&D information, outreach and availability certificate is in place.	Bid/RFP gets routed to appropriate departments and Supt. for prior approval	BOE office receives copies(10) for BOE member review prior to BOE meeting	Bid approval may be delayed at this point.	Bids/Contracts may be denied, approved or tabled by the Board. Tabling, typically due to not having enough information, causes delays in the start or delivery of		Contract needs to be amended as written	
Timeline	After budget release			1 day - 4 wks	2 days - 1 wk	1 day to 1 wk	15 days		1 wk	1 day +	48 hours		6 wks		1 hr to 2 days	1 day	10 days	10 days	1 day to 1 wk	1 wk	1 wk	If the Board decision is too restrictive, the timeline may be expanded.	1 day	up to 4 months	

SHARED PLATFORM REQUIREMENTS

1. SYSTEM ARCHITECTURE
    a. The architecture must provide the Central Office and all schools of HCPSS with the ability to collect the required data and provide access to the collected data. The primary architecture should be a centralized, user-friendly (Graphical User Interface) software system accessible through web page compliance (W3) standards along with cross-browser support (Microsoft Edge Version 40, Internet Explorer Version 11, Firefox Version 52, Chrome Version 58) with the data hosted by HCPSS. HCPSS allows a Bring-Your-Own-Device (BYOD) initiative for students and staff, and will have numerous devices to support including, but not limited to mobile phones, tablets, Chromebooks and laptops. The system should include as part of the final solution certain mandatory local modifications, reports and minimum configurations for user access devices that are required by the time of initial pilot.

2. CURRENT STATE
    Computer & Server Hardware and Operating System Infrastructure
    a. The HCPSS supports computers running Windows, Apple and ChromeOS operating systems. Any proposed solution must be capable of working with full functionality in all environments for classroom and school front-office users. The current computer configuration includes as a minimum Windows 7 SP1, Windows 10, and Apple OS X 10.9 through 10.13. The HCPSS has supports a Bring Your Own Device (BYOD) initiative for students and staff that include mobile phones, tablets, and laptops.

    b. For supported server environments, HCPSS runs Windows 2008 R2 through 2016 and Ubuntu 16.04 to handle critical student information as well as business systems. HCPSS has implemented a Microsoft Active Directory Services architecture that is used for all network and some system authentications. Currently supported databases include MySQL, PostgreSQL, and Microsoft SQL Server.

    Local Area Network (LAN) Configuration
    c. The HCPSS has a very robust network infrastructure. All hard-wired access devices connect at a minimum of 1gpbs switched. The network switching architecture includes Aruba, HP, and Cisco LAN switches. VLANs and firewall technology have been deployed as part of the overall network security plan.

    d. The HCPSS deployment of wireless connectivity throughout the school system includes 2.4GHz 802.11g/n and 5GHz 802.11n. All classrooms, offices, meeting and common areas are equipped with Aruba wireless products to meet this need. Aruba Airwave and Clearpass solutions have been deployed to enable HCPSS staff to provision and manage wireless services accordingly. The wireless

network is connected to the wired network with UTP with a minimum speed of 1gps per AP.

e. Wide Area Network (WAN) Configuration

f. HCPSS uses Howard County ICBN (Inter County Broadband Network) as a data communication service to provide for data connectivity between remote school locations and central office. The ICBN provides between 1GBps and 5GBps bandwidth from each remote site over a fiber optic network.

3. **Communication Systems**
The following requirements describe the communications systems which operate on the HCPSS network and strategies which would need to be compatible with the Offeror's product:
   a) Email Service: HCPSS uses Microsoft Office 365 for all corporate email communications.
   b) Content Syndication: Provide data as feeds that are accessible via HTTPS XML or JSON structures.
   c) An External REST-ful Application Programming Interface (API): An API means that we could write programs that could read/write data or call methods against the Offeror's product using defined JSON or XML structures.
   d) WebHooks: WebHooks are extensibility points inside the Offeror's product that allow specific URLs to be triggered when events happen within the system. (i.e. A student gets added to the system and the system calls a specific URL for subsequent actions.)
   e) Plugins/Internal API: The product has an internal, documented API that allows custom developed modules to run within it and safely access data.
   f) Content Syndication, JavaScript Widgets/ iFrames, and External REST-ful Application Programming Interface (API) are all accessible via HTTP and a standard and secure programmatic authentication mechanism.
   g) Existing Student and Staff Management Systems
   h) HCPSS currently maintains several information systems to manage its student information and staff needs, including but not limited to:
      i) Synergy – Student Information System, Collects and reports student demographic, enrollment, attendance, conduct, course, and transcript data. Includes grade book and family/student portal tools.
   (1) Microsoft SQL Server, Hosted In-House.
      ii) Hoonuit – is an end-to-end data warehouse solution with reporting, analytics and data visualization all in one. This complete solution supports the school district's administrators, leadership, and teachers to access, query, analyze, and use data to inform policies, practice, and decision-making at all levels of the organization. Hoonuit can be used to view enrollments, attendance, discipline, grades, assessments, etc. in one central location.
      (1) Microsoft SQL Server, Hosted In-House, Data is loaded nightly from disparate sources

iii) Workday – ERP Management system for financial and employee data.
(1) Hosted Cloud Based, Data Movement: Inbound and Outbound.
iv) CANVAS - Learning Management System - Used by teachers, students and parents for assignments and assignment scores
(1) Cloud Based, Data Movement: Automatically from Synergy every night
v) HCPSS currently exchanges data with many different internal and external systems, including but not limited to
vi) TieNet – Document special education plans and meetings. Student demographic data is pushed to Tienet from Synergy every 20 minutes.
(1) Hosted, Data Movement: Inbound Data from Synergy and Outbound to Synergy.
vii) Naviance – Guidance counseling, College planning application students use to manage college application submissions and reporting SAT, PSAT, and ACT test scores. Data is automatically imported.
viii) Newton Point of Sale (PoS) (MCSoftware Company) – Manage student meal accounts. Student class roster data is automatically uploaded nightly.
ix) FitnessGram – Records student health and athletic milestones. Student roster data is uploaded automatically every night.
x) Library Corps – Manages student book check outs/ins. Student data is automatically uploaded daily.
xi) Transfinder – Routes school buses for all students. Data is uploaded automatically nightly.
xii) Pearson SuccessNet - Online textbook service, data is manually automatically.
xiii) Maryland Department of Mental Health and Hygiene: Attendance data from each school is automatically pushed daily.

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END OF ADDENDUM