

Addendum 1  
Community Healthcore  
Request for Proposals  
RFP 1005-22, Addendum #1  
Life Cycle Contract Management System  
April 1, 2022

The posted RFP # 1005-22 Life Cycle Contract Management System has been modified as follows:

1. A Word version of Attachment A1 Worksheet – Functionality is posted for Responders to use. It is identical in wording to the PDF version originally posted.
2. RFP # 1005-22 QUESTIONS & ANSWERS. A Question and Answer Session was conducted on Tuesday March 29 from 10:00 a.m. to 11:06 a.m. Questions were submitted in writing or posed during the call. This attachment lists the questions and the official answers. Please use these responses to assist in your proposal.
3. IMPORTANT INFORMATION re III. Scoring the RFP, C. Demonstration of Software (page 13): The Evaluation Team anticipates coordinating finalists to Demo in the window of Tuesday, May 3 – Thursday, May 5. Invites are anticipated going out on April 27<sup>th</sup>. Given the short turn-around time frame, we are requesting Responders be prepared to Demo in the window of Tuesday, May 3<sup>rd</sup> – Thursday, May 5. As stated in the RFP, demo would be for one hour and Q&A for an additional hour. This would be in person or virtual by the choice of Vendor.

All other information in the RFP remains the same.

The following questions were received prior to or asked during the Question and Answer Session held on Tuesday, March 29<sup>th</sup> for RFP # 1005-22 Life Cycle Contract Management System. There were a total of 38 Questions. Many answers were provided during that session and others deferred to this posting. PLEASE NOTE THE ANSWERS PROVIDED HERE ARE THE OFFICIAL ANSWERS TO ALL QUESTIONS REGARDLESS OF WHAT WAS STATED DURING THE SESSION. Please use this information to assist you in crafting your response.

#	Question	Answer
1	Whether companies from Outside USA can apply for this? (like, from India or Canada)	<p>The Center is a unit of local government working with many funders including the State of Texas and Federal Government. As such we are prohibited from contracting with companies located in certain countries. Please identify the country of your home office in your Proposal.</p> <p>Due to the sensitive and confidential nature of the information at issue in this RFP, the selected vendor must provide appropriate security and protocol insuring that storage of and access to all of the data related to this project is limited to locations in the USA.</p>
2	Whether we need to come over there for meetings?	If the question is whether you need to come over to our physical locations regarding the RFP, the answer is "No". If you are the selected Vendor, the answer is still "No" provided there is a secure and effective communication system with support during business hours, Central Time USA.
3	Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	<p>The purpose of this RFP is the purchase/lease of a Life Cycle Contract Management Software.</p> <ul style="list-style-type: none"> <li>• Setup and support would be required by the selected vendor. A preference does exist for onsite training and initial setup but it is not a requirement. Again per the above response effective communication system with support during business hours, Central Time USA.</li> <li>• Due to the sensitive and confidential nature of the information stored, the selected vendor must provide all backup storage to be located in the USA.</li> </ul>
4	Can we submit the proposals via email?	Yes. The RFP provides instructions whereby a responder can submit a proposal by email. Please read the RFP for details on page 1 of the RFP.

5	Can you please provide the Attachment A1 Worksheet in MS Excel or MS Word (an editable) format?	Yes, in Addendum #1 anticipated to be posted at the end of the week, we will also post a Word version of the Attachment A1 Worksheet in MS Word.
6	Would you be open to pricing for the Contract Management Software to be hosted by vendor (SaaS/cloud) or deployed on your organization's server (on premise)?	The Center is pursuing software and records maintained in the Cloud. However, the Center is seeking best value so RESPONDER may offer pricing for other options in addition to a Cloud solution.
7	<p>How many total users?</p> <ul style="list-style-type: none"> <li>a. How many internal users will require administrative level access?</li> <li>b. How many internal users will require the ability to add, edit and delete?</li> <li>c. How many internal users will require request only access?</li> <li>d. How many internal users will require read-only access?</li> </ul>	<p>The Center estimates the following but depending on the system the actual may be different.</p> <ul style="list-style-type: none"> <li>a. 3</li> <li>b. 5</li> <li>c. ?</li> <li>d. 72</li> </ul> <p>Estimate 80 people total.</p> <p>So each RESPONDER's system may be structured a little differently which is why we list on Page 11 of RFP, under C. Cost &amp; Contract, 1. Second bullet – "provide cost per user license per level".</p> <p>The ideal system would also privilege who could access which documents. For example, a program manager would have read only access only to those agreements that are relevant to their area of responsibility.</p>
8	How many internal users do you project will require access to the system at any given time?	CENTER estimates 10 users would be a system high with the average being only 5 or 6 in the system on average. We may learn that it will be much higher than that.
9	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.)	The CENTER would like to import current agreements with amendments and supporting documents (such as licenses, insurance, ...) into the new system. The CENTER is open to the additional options a Responder may offer regarding data import with pricing to help the CENTER determine how to best accomplish importing current agreements.

	<p>e. How many total electronic files (PDF, MS Word, etc.) in current/legacy system into the Contract Management System?</p> <p>f. How many total electronic files in current/legacy system? (rows in the exported spreadsheet)</p> <p>g. Where are the legacy (historic) electronic contract files currently stored? (shared folders, SharePoint, document management system, paper, etc.)</p>	<p>a. In the legacy system is made up of 12 years of electronic records. However, we are planning to move only the current agreements.</p> <p>b. Our best answer comes from page 9, second paragraph, "It currently has approximately 60 State and Federal Income Agreements and Grants with various renewal dates; 15 Health Plans; 200 Professional Expense Contracts that renew annually; 15 property leases; 30 Affiliation agreements with Universities; 75 Memorandums of Understanding; and 100 Service Agreements. About 60% of these documents utilize the Center's format and 40% from outside payers or vendors."</p> <p>Rounded up the total is estimated to be 500 agreements. Given that some documents have amendments, and other supporting documents, a best guess is between 1,500 to 2,000 files.</p> <p>c. The legacy documents are part of a Shared drive maintained by our IT Department and backed up daily.</p>
10	<p>Can you please expand upon your preferences to integrate with Prospero? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.</p>	<p>Prospero is the current budgeting system used by the CENTER. As budgets are being developed and then updated throughout the year, contract expenses are one of the key components. Ideally the Life Cycle Contract Management System can interact with Prospero so we are not writing a contract for \$50,000 when the budget only has \$10,000 budgeted for that vendor.</p> <p>Prospero is a commercial product, Version 2.1.1096.14 and database structure is in MS SQL.</p>
11	<p>What objects, fields, and tables will your organization be passing in the data integration between the Contract Management Solution and Prospero?</p>	<p>Vendor Name and amount budgeted.</p>
12	<p>Is Prospero installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?</p>	<p>Prospero is deployed on our server at the CENTER.</p>
13	<p>Does Prospero have one of the following available for integration and your</p>	<p>At this posting it is undetermined.</p>

	organization has licensed access: SOAP API, REST API?	
14	Can you please provide additional details about your organization’s process flows or diagrams as it relates to the integration requirements?	<p>Ideally a contract is requested. Information is provided regarding the need. Procurement must be followed but at the end of procurement the CENTER contracts with the selected vendor using one of the existing templates the CENTER’s Attorney has created. The Center desires to check in Prospero for a budget amount and enter that into the correct field. We would then place document into AssureSign and it would obtain signatures. As seamlessly this or similar process can be performed the better.</p> <p>Another important integration is ideally with MAS200 our financial software. We are seeking a product that will assist the CENTER in comparing expense contracts YTD expenses. We have certain requirements not to exceed the amount a contract is written for so a bridge in the form of an inquiry ideally where a monthly or even weekly reports can be easily generated tracking the amount left on the contract before exceeding that amount.</p>
15	What documents/contract types would you like to author within the system (number of templates)?	We estimate Expense Contracts for Professional Services – 1; Expense Contracts for Non Clinical Services -1; Affiliation Agreement -1; MOU – 6 unique versions, Income Contracts – 8 unique versions. Would also like the ability to have a one-page Amendment for the Professional, Non Clinical Contracts and Income contracts.
16	<p>Do you require professional services to configure templates?</p> <p>a. If so, how many would be required for the awarded vendor to configure?</p>	<p>THE CENTER uses templates created by our Attorney. Depending on the system selected we would work with the Vendor to configure the template into the system.</p> <p>Desire is for a system to populate many fields in the template from request forms or another source so that information does not need to be retyped such as Vendor Name, address, telephone number, email, and so on. So this may require professional services to configure templates.</p> <p>Vendor needs to clearly state how this is performed within their system and what the Center would do and what the Vendor during implementation.</p>
17	Do you require professional services to configure workflow processes?	Part of the implementation would be to create the workflow processes and the training would cover how to modify workflows or establish new ones.

	<p>a. If so, how many would be required for the awarded vendor to configure?</p>	<p>The Vendor should provide costs to assist Center with workflow processes. It is undetermined how many actual workflows are needed as it is unclear when a different form of a template would constitute a different workflow.</p>
18	<p>Can you please provide additional details about your organization's workflow/approval processes?</p> <p>a. Can you please provide number of steps and examples?</p>	<p>A typical work flow for a Professional Services Contract is:</p> <ol style="list-style-type: none"> <li>1. A need is identified outside the Contracts Department that is determined to be met by contract.</li> <li>2. Procurement is conducted by the Contracts Department and/or Unit depending on type of service and total expense. Once vendor is selected it goes to the Contracts Department.</li> <li>3. Contracts Department             <ol style="list-style-type: none"> <li>a. Selects the appropriate template and clauses</li> <li>b. Populates required fields including "Not to Exceed amount" (Prospero)</li> <li>c. Individualizes such as one year vs. one year with two, one-year renewals;</li> <li>d. Save the contract in PDF form and send it through AssureSign.</li> <li>e. After fully executed save a copy on the Shared Drive.</li> <li>f. Send manually it needed to all parties.</li> </ol> </li> </ol>
19	<p>Do you have an established time frame for the implementation of the awarded solution?</p> <p>a. If so, what are the anticipated kick-off and go-live dates?</p> <p>b. If no specific dates have been established, how many weeks do you plan to dedicate to the implementation process?</p>	<p>We plan to award at the May 26, 2022 Board Meeting. Once purchased or leased we would work with the approved Vendor as soon as possible. Our fiscal year runs from Sep 1 – Aug 31 so if we are able to have the Professional Contracts online by August 15<sup>th</sup> that would be wonderful but appreciate that may be unrealistic.</p> <ol style="list-style-type: none"> <li>a. Anticipate a kick-off on or before June 13, 2022. No required go live date but would be valuable if able to run Professional Contracts through by August 15<sup>th</sup>.</li> <li>b. The implementation plan would be a part of each Vendors proposal. Proposals need to clearly define the work of the CENTER and the work of the Vendor in their proposal.</li> </ol>
20	<p>How many attributes are we expecting total to drive contract creation? How many unique input fields?</p>	<p>If the question is how many ways would start a contract creation?</p> <ol style="list-style-type: none"> <li>a. Program Manager or other staff (see Q18)</li> <li>b. Outside request</li> <li>c. Request for Application</li> <li>d. Amendment.</li> </ol>

		Regarding unique fields - probably 20.
21	Will there be multiple party contracts?	Practically no. The only multiparty contract identified is for a sublease for a portion of our lease, so we have a Sublessee, the Center and the Landlord.
22	Will contract renewals be in scope? If so, will renewals generate a new contract, or extend the current contract?	Yes, contract renewals will be in scope; our preference is to have a one-year contract with two, one-year renewals. So for the second and third year the Center issues a one-page Addendum extending the contract 1 additional year and any changes from the original.
23	Are there any integrations required in addition to AssureSign? Will Single-Sign-On (SSO) be required?	Integrations <ul style="list-style-type: none"> <li>• AssureSign or like system</li> <li>• Preferred – Prospero</li> <li>• Preferred – MAS200</li> </ul> Single Sign On The CENTER does use Multi Factor Authentication Microsoft Azure.
24	How many unique templates are expected to be configured?	See Q15
25	What is the expected number of unique contract clauses?	CENTER Contracts are standard with just a few unique clauses. Examples are “Training Requirements”, “Term”, and “BAA” are the primary ones. The CENTER anticipate less than 10 altogether.
26	Will there be multiple languages required for the contracts?	Currently only in English with no foreseeable need for a different language.
27	Will migration of previous contracts be in scope for this engagement? If so, will only active contracts need to be migrated?	Only active contracts with their amendments are anticipated to be migrated.  As an option, the pricing for the migration of those contracts is requested.
28	What is the expected timeline for delivery? Are you expecting a single deployment cycle, or a phased approach?	It is undetermined at this time regarding best approach. Having a functional system by August 15, 2022 would be ideal so Professional Contracts can be issued for fiscal year FY23 which starts September 1, 2022. So Center would enter into discussions with Selected Vendor to finalize implementation strategy.
29	Do you have any change management requirements in addition to system training?	Center would consider any change management assistance offered by the selected Vendor. This could be either a paid service or a value added component as we implement a new system. The Center would need to weigh any cost verses the anticipated benefit.
30	Do you need support with redesigning/standardizing contracting processes and/or harmonizing your contract templates?	This may be a need depending on the system selected. Assistance with standardizing contract processes would be beneficial and options with pricing should be included in the proposal. The Contract Templates come from our

		Attorney so this appears to not be as great a need. However, options and pricing should be provided in the response.
31	What are the training needs for the Contracts team? Super user training? End User Training?	We would anticipate initial training for all of the groups listed (Contracts team, Super Users, and End User). See Q7 for anticipated users. Please provide a breakdown of cost per person per category.
32	What are the expected needs post go-live? Will hypercare support be required?	Undetermined at this time and dependent on the complexity of the system selected. Please provide options for post go-live support. Regarding intensive support needs, undetermined until we better understand the system selected. If your company offers hypercare services that can assist in the successful start of the new fiscal year, please provide as an option with pricing.
33	Is it required for all team members associated with project delivery to be located in the US?	Team Members who have access to the contents stored in the system need to be located in the USA. (See Q1)
34	How many users / staff will be requesting contracts and legal reviews?	Best estimate is twenty persons outside the Contracts Department.
35	How many resources, outside of the three full time employees in the Contracts Department, will be managing contracts in the system?	"Managing" has possibly two answers. Regarding the physical managing of the system, it would be primarily the 3 staff plus 2 backups. Regarding accessing the records see Q7.
36	How many unique internal approvers are there in the various stages of contracts workflows?	Technically there are only 4. First is the Requestor, second the Contracts Department, Third the Director of Contracts Management, and Fourth the Executive Director as far as signing. There could be cases where a contract needs to be diverted to fiscal services or to an Acting Executive Director.
37	How many contracts does Healthcore process on a yearly/monthly basis?	In Q9, the number of active agreements is estimated at 500. Some of these are not annual so 350 to 400 is the estimate processed every year. The start of the fiscal year is the heaviest time period with about 250 to 300 occurring in a 3-month window.
38	On the question of the resources outside the US; Are you open to having non-US resources in the configuration and setup? An off-shore team would build and set up. Is this something that you would consider for a lower-cost alternative?	The response in Q1 pertains to the storage of the information and from where that information can be stored. If this question (Q38) is the creation of the software platform without any data in the system, this would be considered provided that after configuration, access is terminated. Please provide details in your proposal for both in the USA only and use of an off-shore team outside.