

COUNTY OF ROCKLAND  
Department of General Services  
Purchasing Division

# Contract Award Notification

Title: **Human Services Contract Management Application**

Contract Period: January 1, 2024 through December 31, 2024 w/4-1-year options  
Extended through 12/31/25 w/3-1 year options  
**Extended through 12/31/26 w/2-1 year options**

Original Date of Issue: 01/08/24

Date of Revision: 03/19/26

**RFP No:** **RFP-RC-2023-020**

**Ordering Method:** **Special Request**

Authorized Users: DSS

Address Inquiries To:

Name: Sabrina Samuels  
Title: Assistant Director of Purchasing  
Phone: 845-364-3807  
Fax: 845-364-3809  
E-mail: [samuels@co.rockland.ny.us](mailto:samuels@co.rockland.ny.us)

**Description**

This contract is for a Human Services Contract Management Application and Annual Maintenance (SaaS)

Contract #	Vendor Number	Contractor & Address	Telephone No.
RFP-RC-2023-020	0000027052	Lasgrove Inc dba iON Contracts 1171 S Robertson Blvd. #374 Los Angeles, CA 90035 Contact: Jeffrey Ives <a href="mailto:Jeff.ives@ioncontracts.com">Jeff.ives@ioncontracts.com</a>	818/915-3053

**COST PROPOSAL TEMPLATE**

Proposers must use this Pricing Form to submit their pricing for the Services and Materials described in this RFP. An all-inclusive rate (travel, management, administration, overhead, supplies and materials) must be provided.

**OFFEROR NAME: LASGRO Inc. dba iON Contracts**

	2024	2025	2026	2027	2028
Description	Year 1	Year 2	Year 3	Year 4	Year 5
Platform Fee	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
Installation And Set Up	\$10,000				
10 User Licenses (see below for discount prices bundle prices) **	\$19,920	\$19,920	\$19,920	\$19,920	\$19,920
Live Training For RCDSS Users and Contract Agencies	\$2,000	\$2,000	\$2,000	\$3,000	\$3,000
Technical Support For RCDSS and Contract Agencies	\$3,500	\$3,500	\$3,750	\$4,000	\$4,250
Additional Customizations, as requested by RCDSS (per hour)	\$125	\$127	\$129	\$131	\$133
Miscellaneous Costs, if any please outline / itemize					
Software maintenance and support package for years two (2) to five(5)		\$3,500	\$3,750	\$4,000	\$4,250
Potential "alla carte" customizations. Rate per hour. Approximately 100 hours	\$125	\$127	\$129	\$131	\$133
Hourly Rate to integrate LegalStratus	\$125	\$127	\$129	\$131	\$133
<b>Total</b>	<b>\$39,420</b>	<b>\$32,920</b>	<b>\$33,420</b>	<b>\$34,920</b>	<b>\$35,420</b>

\*All prices are to be inclusive of all administrative and operational expenses. Transportation and mileage is to be included in the pricing. The County of Rockland will not be responsible for any additional fees for office supplies, invoicing, administrative duties and transportation including, mileage, tolls, vehicle maintenance and gas.

\*\*User license fees will be reimbursed over a 12-month period; not incurred up front.

	# of licenses	monthly license price
<b>User license prices are as follow:</b>	1 - 15	\$166
	16 - 25	\$155
	26 - 40	\$145
	41 - 60	\$122

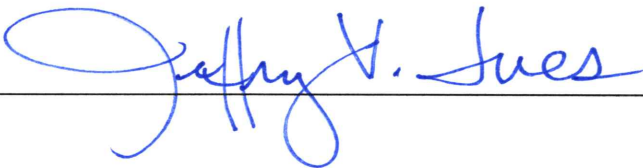
Additional Features: **E-signature** integration with PandaDoc or SignPoint.

**PandaDoc** - \$2.00 per document

**SignPoint** - \$1.20 per document (contracts and invoices only).

Should the county decide to collaborate with SignPoint, they will be able to transition all (non-contract/non-invoice) forms and applications to E-signatures without any additional charges per signature.

Authorized Representative: Jeffrey Ives

Authorized Signature: 

**DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION**

Dr. Robert L. Yeager Health Center  
50 Sanatorium Rd, Building A  
Pomona, New York 10970  
Phone: (845) 364-3820 Fax: (845) 364-3809  
Email: purchasing@co.rockland.ny.us

**Paul Brennan, FNIGP, NIGP-CPP, CPPO**  
*Director of Purchasing*

**ADDENDUM # 3**

**RFP-RC-2023-020**

**RFP-RC-2023-020 Human Services Contract Management Application and  
Annual Maintenance (SaaS)**

The information in this addendum supersedes any contradictory information set forth in the contract documents. Acknowledge receipt of this addendum in the space provided on the signature page of the bid proposal. Failure to do so, may subject the bidder to disqualification. This addendum forms a part of the contract documents.

Question #2 asked, "Is there a budget for this contract?"

The County responded, "The Department of Social Services anticipates based upon research and requirements the SaaS for this functionality should be no more than \$60,000 annually."

Could the County clarify what this anticipated annual budget includes? Are the costs of system implementation expected to be included in the stated figure of \$60,000 annually? Is it the County's expectation that all line items in the revised Cost Proposal Template be provided for a total of no more than \$60,000 per year?

**Answer:** The County's Budget for this SaaS Software is approximately \$60,000 annually and includes all of the functionality detailed in the RFP, including the initial implementation. Integration costs to other systems would not be included in the annual SaaS licensing fee, and if the county decides to move forward with any integrations in the future, the hourly rates included in proposal responses would be used to develop the budget for such integrations.

Please note the County is seeking a currently available, off the shelf, software product that can be configured to provide the functional requirements of the RFP. The County is not seeking to enter into a development contract to design a system from scratch.

**SIGNED:**

*Paul J. Brennan*

**PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO**  
**DIRECTOR OF PURCHASING**

ADDENDUM

07/21/23

**DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION**

Dr. Robert L. Yeager Health Center  
50 Sanatorium Rd, Building A  
Pomona, New York 10970  
Phone: (845) 364-3820 Fax: (845) 364-3809  
Email: purchasing@co.rockland.ny.us

**Paul Brennan, FNIGP, NIGP-CPP, CPPO**  
*Director of Purchasing*

**ADDENDUM # 2**

**RFP-RC-2023-020 Human Services Contract Management Application and  
Annual Maintenance (SaaS)**

The information in this addendum supersedes any contradictory information set forth in the contract documents. Acknowledge receipt of this addendum in the space provided on the signature page of the bid proposal. Failure to do so, may subject the bidder to disqualification. This addendum forms a part of the contract documents.

**A pre-proposal meeting was held on Tuesday July 11, 2023, at 10:00 am. The following participants were in attendance and questions were asked via email.**

Sabrina Samuels – Rockland County Purchasing Division  
Melissa Chappell- Rockland County Department of Social Services  
Meredith Siecinski- Rockland County Department of Social Services  
Janet Marasa- Rockland County Department of Social Services  
Wendy Gdanski-Rockland County Department of Social Services  
Mark Navarro - Rockland County Department of Social Services  
Michael Corley- Experis  
Charles Fry- Conga  
Lukas Watson- Accelerated Information Systems  
Jeff Ives- ION  
April Flores- Accelerated Information Systems  
Scott Moni- Experis  
Matthew Grady- Ready Computing  
Olivia Thomas- QnA Tech  
Mike- QnA Tech  
Staffan Lindstrom-Ready Computing  
Kaushal Thakore- Unique Comp Inc.  
Pooja Patel- Unique Comp Inc.  
Collin MacAvoy-QnA Tech  
Courtney- Coastal Cloud

**Please note an updated Cost Proposal has been included.**

Question #1: Are you trying to incorporate different solutions into the Contract Management system, such as Legal Stratus?

Response #1: The Department of Social Services would like the option to possibly integrate Legal Stratus into the Contract Management system. The cost proposal has been updated and included to include an hourly rate for this option should the County choose to complete the integration.

Question #2: Is there a budget for this contract?

Response #2: The Department of Social Services anticipates based upon research and requirements the SaaS for this functionality should be no more than \$60,000 annually.

Question #3: How many users?

Response #3: There are currently 10 users

Question #4: Are there any other County Departments that will interface with the system?

Response #4: No, only DSS at this time.

Question #5: Will vendors have access through the portal?

Response #5: Yes, vendor will need access.

Question #6: Do any other Departments use Salesforce?

Response #6: Yes, however they do not have any interaction with this application.

Question #7: What are the different contract management actions covered under the proposed scope?

Response #7: All of the contract management actions are covered under the proposed scope within the RFP.

Question #8: Are the funding applications under a contract or can the vendors request funding without a contract?

Response #8: Vendors cannot request funding without a contract.

Question #9: Can you provide PDF version of the long and short form funding applications?

Response #9: Funding applications have been included for review.

Question #10: What is the workflow for the funding application?

Response #10: Funding applications are uploaded to contract pages; the vendors complete and sign applications by the deadline and submit through the portal when completed.

Question #11: Do you have a test environment for all integration requirements? i.e. PandaDoc, LegalStratus, Salesforce, iON, PeopleSoft?

Response #11: PeopleSoft does have a test environment the other applications do not have a test environment available.

Question #12: Do you have functional requirements for the proposed system or is the vendor required to do that?

Response #12: Any specifics related to the functional requirements are listed in the RFP document.

Question #13: If the vendor is required to gather requirements, where do we indicate that cost? Cost proposal does not include a line item for requirements gathering.

Response #13: An updated cost proposal has been included in this addendum, this cost proposal must be uploaded separately in the appropriate section in Bonfire, however if the bidder would like to include optional pricing the County will review this pricing with the submission. Optional pricing must be uploaded separately in the Cost Proposal section in Bonfire.

Question #14: Can we request a 2-week extension?

Response #14: At this time, the deadline has been extended for one week.

Question #15: In the section titled “Purpose of Request for Proposal (RFP),” the County states that “Preference would be given to a Proposer who can have the system up by September 1, 2023, or soon thereafter,” but under “Length of Contract,” it is stated that the contract will begin on January 1, 2024. Please clarify the County’s anticipated and preferred contract award, contract start, and go-live dates.

Response #15: The go live date would be January 1, 2024, the County anticipates contracting with the awarded vendor as of September 1, to have integration complete for go live.

Question #16: Section VII of the proposal is listed as “Redacted Proposal if applicable.” Please confirm that the County would like the redacted proposal to be submitted as a separate document, and not as a section within the main proposal document.

Response #16: If there is information that would be required to be redacted, a redacted version can be uploaded separately.

Question #17: “The proposed SOW, when accepted by the County, will be included in the final contract.” Is the County asking for a fully executable SOW with all Terms and Conditions to be submitted with the proposal, or is this meant to be a sample SOW, which would then be finalized upon down-selection and re-submitted to the County for acceptance?

Response #17: Please submit a standard license agreement, and full description of existing functionality, along with a sample SOW.

Question #18: For Workers Compensation and Disability Insurance, the RFP states that “The Vendor will send the appropriate forms to the Purchasing Division within five (5) business days of notification of contract award.” However, in Section H of the Required Disclosures, it states that “Contractor must submit valid NYS Workman’s Compensation and NYS Disability Certificates or Attestation of Exemption with the bid/proposal.” Please clarify whether vendors should submit these with the proposal or upon award.

Response #18: These are not required with the proposal submission they will be requested should the County choose to move forward with an award and must be furnished within 5 business days.

Question #19: Is the County seeking a product to replace the existing software, or enhance the current software.

Response #19: The County is open to both options depending on the solutions provided for submission.

Question #20: Does the County have existing templates of the various funding applications and custom forms already? If so, can those be shared?

Response #20: These will be uploaded for review. Applications are subject to change for 2024 contracts.

Question #21: Is the expectation that PandaDoc will continue to be used as the E-signature tool, is the county open to replacing Panda?

Response #21: PandaDoc or DocuSign are preferred; however, the County is open to replacing Panda.

Question #22: How many legacy contracts are currently being tracked?

Response #22: We have approximately 160 contracts currently on the “portal”.

Question #23: Will this project require data migration from existing systems? If so please describe the data, number and type of records, the total size of the files?

Response #23: Data migration would be necessary if the application will change from iON Supply Chain Software. The data kept on the system are notes, emails, vouchers, contracts, applications, misc. contract related data. We have one contract page per contract each year so there are approximately 130 contract pages created each year and each contract page contains all data

listed. There are approximately 30 additional contracts that span over multiple years, therefore they would require new contract pages once every two-four years. The vendor should be prepared for data size of 1GB to 100GB total file size.

Question #24: Are the current existing contracts OCR's and is their metadata captured? If not, is that a service the County would expect to be provided?

Response #24: We would require an image capturing service as well as document management system.

Question #25: Do the systems you wish this solution to interface/integrate with have APIs available? If so, are they available for review, If not please describe integration capabilities?

Response #25: APIs are not needed at this time.

Question #26: How many internal users will require administrative level access?

Response #26: Three to four users will have administrative level access.

Question #27: How many internal users will require the ability to add, edit and delete?

Response #27: Seven users.

Question #28: How many internal users will require read-only access?

Response #28: Two to three users will require read-only access.

Question #29: The RFP states a minimum of 10 users. Are there expectations of possibly more?

Response #29: At this time, there are 10 internal users plus the vendors must have access.

Question #30: 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.)

Question #30: Yes, if necessary. All data currently in the system would have to be migrated if migration is necessary.

Question #31: How many total electronic files (PDF, MS Word, etc) in current/legacy system into the CLM?

Question #31: We have approximately 12,500 files.

Question #32: How many total electronic files in current/legacy system? (rows in the exported spreadsheet)

Response #32: We have approximately 12,500 files.

Question 33: Where are the legacy (historic) electronic contract files currently stored? (shared folders, Sharepoint, document management system, paper, etc)

Response 33: All of the above are currently used to store files.

Question 34: Can you please expand upon your preferences to integrate with the systems specified on page 10? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.

Response #34: Vendor must be prepared to integrate or replace the capabilities provided by the systems indicated on page 10.

Question #35: Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?

Response #35: The other systems are on our server.

Question #36: Do the systems in question have one of the following available for integration and your organization has licensed access: SOAP API, REST API?

Response #36: What systems in question are being referenced?

Question #37: Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements?

Response #37: The Department of Social Services has not identified integration at this time. Hourly rates are requested to cover possible future integration.

**SIGNED:**

*Paul J. Brennan*

**PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO  
DIRECTOR OF PURCHASING**

ADDENDUM

7/20/23



**Edwin J. Day, County Executive**

**TITLE: Human Services Contract Management Application and Annual Maintenance (SaaS)**

**RFP NUMBER:**  
RFP-RC-2023-020

### **PURPOSE OF REQUEST FOR PROPOSAL (RFP)**

The purpose of this Request for Proposal is to solicit competitive sealed, fixed price proposals (Proposals) from qualified firms / bidders to provide and maintain a web-based Software as a Service (SaaS) solution for a Contract Management functionality for the Rockland County Department of Social Services (RCDSS). This software will maintain and increase efficiencies in the RCDSS procurement process, in accordance with the terms of this Request for Proposal (RFP). The Rockland County Department of Social Services (RCDSS) currently utilizes ION Supply Chain Software Development software for contract management. RCDSS is looking to contract with a firm that be able to provide additional services and enhance the current contract management software.

The successful Proposer will provide the web-based software, first year implementation, user licenses for a minimum of 10 users, training to employees of the county as well as vendors that will utilize the contract management system (web-based portal), technical support six days per week, and maintenance and support package for years two (2) to five (5).

This RFP is designed to provide interested offerors with sufficient basic information to submit proposals meeting minimum requirements but is not intended to limit a proposal's content or exclude any relevant or essential data. Offerors are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

The RCDSS is seeking a System that will drive greater process efficiencies throughout the procurement and contracting process by:

- Eliminating any redundant software applications currently in use.
- Reducing manual, paper-based processes and process cycle times.
- Improve Agency and Department / Vendor interactions with use of the System and interactive web-based portal.

The successful Proposer will perform and oversee the design, configuration, testing and post implementation support of the system. The successful Proposer will be asked to make recommendations on the development of functionality to reach the ends desired by RCDSS.

The successful Proposer will be required to work with RCDSS, and otherwise confidential information, and will be required to enter into agreements to ensure that confidentiality.

After evaluation, based on the criteria indicated, a firm will be selected based on specialties, knowledge, skill set experience, ability to integrate all software (listed within Background section) and qualifications.

RCDSS intends to make one award to the top responsible bidder. However, RCDSS reserves the right to Award the respondent that has been shortlisted if the awarded vendor can not fulfill their obligations as stated in the RFP.

Preference would be given to a Proposer who can have the system up and live by September 1, 2023, or soon thereafter.

### **BACKGROUND**

The RCDSS manages approximately 150 contracts / plans / grants each year. RCDSS communicates frequently throughout the year to obtain / submit vouchers, insurances, required contract documents, misc. messaging, etc.



**Edwin J. Day, County Executive**

**TITLE: Human Services Contract Management Application and Annual Maintenance (SaaS)**

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The preference is for a Software as a Service (SaaS) solution that supports integration, adaption, easily feasible implementation with the software currently in place, which includes:

- LegalStratus Application Hosted By Salesforce Lightning Platform Plus
- ION Supply Chain Software Development
- Microsoft Office as our standard suite of tools for solicitation development and evaluation.

Our current use of multiple software systems is not maximizing the efficiency and effectiveness in the processing and monitoring of products and services. Some of the biggest challenges with the current processes include:

- Entering the same data on multiple software systems is labor intensive and requires a disproportionate amount of administrative overhead to manage, while also rendering the process vulnerable to human error, bottlenecks, risks, and delays in all stages of the contract management process.
- There is no central repository for information and report tracking as documents are saved in multiple locations.
- No transparency for vendors related to the status of their contract / contract documents.

#### **Current Technical Environment**

- RCDSS currently utilizes supply chain web-based contract management system. ION Supply Chain Software Development

#### **REFERENCES**

Unless otherwise stated, proposal must include a minimum of three (3) current projects and two (2) past projects.

#### **ISSUING OFFICE AND RFP REFERENCE NUMBER**

The County of Rockland's Department of General Services – Purchasing Division is the issuing office for this document and all subsequent addenda relating to it, on behalf of Rockland County Department of Social Services. The reference number for the transaction is Solicitation # RFP-RC-2023-020. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

#### **LENGTH OF CONTRACT**

The Contract resulting from this RFP will be for a period of one (1) year commencing on January 1, 2024, with four (4) additional one (1) year renewal options.

The County of Rockland reserves the right to review contract(s) on a regular basis regarding performance and cost analysis and may negotiate price and service elements during the term of the contract.



**Edwin J. Day, County Executive**

**TITLE: Human Services Contract Management Application and Annual Maintenance (SaaS)**

**RFP NUMBER:**  
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## STATEMENT OF OBJECTIVES

- The desired web-based Contract Management Software must be innovative, fully integrated, marginally automated and readily communicate/compatible with all software currently utilized by RCDSS, which includes, but not limited to Microsoft Office, PandaDoc, Legal Stratus, Adobe.

The successful Proposer will perform and oversee the design, configuration, testing and post implementation support of the system.

The software must only require internet browser software for user access, and common software products (such as, but not limited to, Adobe, Microsoft Office). No site or application will be created using proprietary features available to the visitor only when using a certain brand of Web browser. The software must not require any local installation. It can require authenticator over a browser.

RCDSS must have different interface than the vendor portal users.

The Portal must have the capability at minimum to perform the following:

- provide a possibly improved Customer Service or User experience for both Vendors and RCDSS
  - The current system provides contract management allowing seamless communication between vendors and RCDSS related to each contract.
- communicate with or integrate with the Software currently being used such as Microsoft Outlook and PandaDoc
- streamline and standardize multi-system, manual, paper-based procurement, contracting, and monitoring to shorten cycle times.
- provide a single place to perform, manage, track and report on all contract management activities.
- increase transparency of the contract monitoring process
- reduce the re-entry of information across systems, and processes to minimize errors, re-work and duplication of effort.
- increase security and control of procurement data and documents by reducing physical and electronic storage locations.
- allow RCDSS to run analytic reports
- search feature allowing RCDSS to filter by different headings (ie contract purpose or contract year, etc.)

The Contract Management System must streamline the contract process, providing greater process efficiencies through the procurement, contracting and monitoring process by:

- Eliminating redundant software applications currently in use
- Reducing manual, paper-based processes and process cycle times.
- Improve Agency and Department / Vendor interactions with use of the Contract Management System

The goal for the project is to maintain and/or improve existing functionality, processes and reports. Exceptions will be made if discovery of any new functionality and changes in the new versions results in RCDSS' desire to switch to the new delivered enhancement. The RCDSS is committed to continuing to improve its current business processes in order to remain aligned with leading practices. The RCDSS is willing to consider changes to procedures to best utilize delivered functionality and/or additional functionality of the selected software.

Through training, workshops and mentoring relationships, the vendor will be responsible for educating the project team in the skills and techniques needed for ongoing maintenance of the system.



**Edwin J. Day, County Executive**

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## **SCOPE OF WORK**

The expectation is that the web-based platform (Portal) will be an end-to-end solution that will allow RCDSS to benefit from efficiencies at every aspect of contract development and management.

### **Critical Criteria**

RCDSS wishes to update its contract management tools and procedures in order to provide greater efficiency, tracking and visibility. As such, the contract management system should provide for the following:

1. The creation, modification, secure storage, and electronic workflow / approval routing of funding applications, contracts and custom forms
2. Establish automated alerts for upcoming contract needs, upcoming contract end dates and needed renewals of contracts, procurements and further notice or other associated deadlines with a smart monitoring system
3. The ability to update / upload funding applications, contract templates in a variety of common file formats
4. The ability to apply electronic signatures either in parallel or sequence
5. Provide an easily searchable system, including full text search capabilities for current or expired Contract Documents with complete digital archiving on secure servers
6. Document version control and the ability to compare versions and originators
7. The ability to route a contract outside of the network to vendors for the purpose of review, editing, negotiation, and finalizing the document
8. The ability to store and link to a contract other related documents such as certificates of insurance, scope of work, purchase orders and or other necessary exhibits.
9. The ability to generate e-mail notifications and reminders regarding contract status
10. The ability to manage other documents that may require multiple parties review, editing and approvals
11. Customer support during the hours of 9am through 5pm EST for technical difficulties
12. Proactively notify on contract expiration based on type of contract
13. Allow for role-based security and task assignments
14. Securely protect all contract and procurement data using best in class infrastructure and proactively mitigate any and all security risks. Such protection may include encrypting data, conducting regular internal audits and penetration tests, and logging platform login and usage to verify proper access
15. Provide automatic circulation of a .pdf of a signed document to all designated recipients once the document is completed
16. Incorporate end user permissions to ensure proper approvals of funding applications, Contract Documents and display where a document is in the approval process
17. Allow users to download documents and folders saved in the software
18. Ability to manage faxed and scanned documents as well as native files in any format, including all versions of .doc, .pdf, .ppt, and .xls file types, common image formats
19. Ability to run multiple analytic reports (including contract purpose / type, total funding reimbursed under certain contract purpose, etc.)
20. Ability to audit status, access, and usage of system resources
21. Graphical approval workflows, that can display where a contract is in the approval process, and pending approvals by user or role, and can note the role and relevance of each approver
22. The RCDSS' preference is for a Software as a Service Solution (SaaS) that supports integration the RCDSS' iON technology that is already in place

### **Specific Functionalities**



**Edwin J. Day, County Executive**

**TITLE: Human Services Contract Management Application and Annual Maintenance (SaaS)**

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The functionality should include, but not be limited to the following:

- Web-based contract funding applications with all required fields, alerts, interactive user instructions, as customized by RCDSS
- Repository for all RCDSS contracts, grants, plans, etc.
- Notification Center
  - Messages and alerts for both vendor and RCDSS issues, deadlines or documents waiting for review
  - External or internal only communication / notifications
- Search feature
  - Easily browse, search, filter and check the status of all funding applications, contracts, grants, plans, etc.
- Platform-based messaging
  - Viewable on platform and via email
  - Internal (RCDSS only) messaging
  - External (between RCDSS and vendors) messaging
- Document management
  - Upload, receive and manage documents in easy to view page
  - Date and time stamped for when documents are submitted, approved or rejected
- Shared and centralized page for all contract, grant, plan resources and communications
- e-Signature integration (PandaDoc preferred) for contracts, vouchers, required contract documents, etc.
- Easy methodology for receipt, approval and rejection of required documents, vouchers, and other submitted documents
- Automatic in-app and email reminders / notifications with quick actions for:
  - Expired tasks
  - Documents pending approval
  - Rejections
  - Document awaiting your signature
  - All signatures placed in a document
- Activity logs
  - Comprehensive, timestamped Activity log to keep track of every action on all contracts
  - Ability to hide low priority items
- Task creation and management
  - Assign tasks with due dates to internal and external users
  - Automated follow-up messaging for outstanding or overdue tasks
  - Create a designated "NOTE" section for internal Users with the ability to add attachments for restricted view (internal only)
  - Create a related matter or link for multiple contracts assigned to one vendor
- Auto-generated email notifications
  - Daily/weekly email alerts to keep all users aware of any pending action
- Workflow timelines for enhanced visibility and customizable notifications
- Privacy Features
  - Ability to choose which files will be accessible to be viewed, or restricted based on user status (ex internal or external users)
- Smart voucher / invoice
  - Line-item validation
  - Unit price validation
- Mass messaging to all or groups of vendors



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- Automated follow-up on mass messaging for vendors who have not completed required tasks
- Multiple approvals for documents, as needed
- Automated expiration notifications for insurance documents
- External third-party document sharing for on-platform feedback
- Reports and Analytics
  - Tailored and expandable Analytics page showing categorized reports
  - Interactive charts that display a breakdown of the data
  - Filter and compare results by date range
- Long term storage of files / document / communications
  - Up to 7 years of storage / archiving on every order / contract that RCDSS uses
- Provide a software solution that supports integration with the software currently in place, which includes:
  - Salesforce Lightning Platform
  - LegalStratus
  - iON Supply Chain
  - PeopleSoft Supply Chain Management, version 9.2
  - Microsoft Office as our standard suite of tools for solicitation development and evaluation

The Successful Proposer must provide the following:

- Implement the landing page design provided by RCDSS.
- Landing page must contain all RCDSS verbiage requested. Perform any changes as required. Fast turn-around time for requests.
- Provide updates as may be required throughout the year.
- The system must allow RCDSS to send messages to multiple vendors at one time while allowing RCDSS to select which vendors or contacts will receive the message.
- Successful Proposer will be provided with list of contact names and emails. RCDSS must have the ability to select which contact receives notifications for different contracts.
- RCDSS must have the ability to add new contracts during the entire term of the RFP award.

#### Application Process

- Each year, the Contractor will be given a list of agencies that must submit an application for funding. The Contractor must create new contract folders for each agency.
- The Contractor will be provided with two documents: one Long Form Application and one Short Form Application. The Contractor must modify the form for use on the web-based portal as electronic submissions allowing for completing, saving, printing of the document as well as expanding fields, creating pop-up fields depending upon answer provided and making fields mandatory. The Forms must also allow for digital signatures.
- Fields in the Application may be fillable or checkboxes.
- Functionality must include inability to submit an Application until all required fields are completed.
- RCDSS must be able to Approve or Reject an Application. If Rejected, a pop up box must appear so that RCDSS can give a description of the reason for Rejection.
- There must be a section for Required Contract Documents which the Contractor will upload the documents that are required and allow RCDSS to add or delete files to the list, as needed.
- Vendors will submit the Required Contract Documents in this section and each document submitted will have an Approve or Reject button with a pop-up box when a document is Rejected so that RCDSS can add the reason for the Rejection. Vendors will then have the opportunity to upload corrected documents.

#### Contract Signing



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- Utilize a program that will allow multiple parties to electronically sign a contract. RCDSS is currently using pandadoc for electronic signature.
- Allow for emails to be sent to the next person in the workflow to advise the contract is ready for signature.
- Send notifications if the contract has been waiting for signature for two days.

#### Documents

- Documents will be uploaded to the portal by vendors and RCDSS.
- Would like the functionality that a document can be marked as private so that vendors do not see the uploaded document or note.

#### Vouchers / Backup Documentation

- Vouchers must be completed electronically on the portal and totals must be automatically calculated.
- Requires functionality to allow for multiple people to sign electronically.

#### Messages

- Must have the ability to send and receive messages through the portal.
- Messages will be sent to contacts external to RCDSS as well as internal RCDSS contacts.
- Messages must remain private when only internal RCDSS contacts are selected. The vendor should not see these messages.

#### Tasks

- Tasks should have functionality to be sent to more than one contact.
- Tasks can be assigned to vendors or RCDSS.
- Functionality should include ability to select how often a notification is sent to the assigned person until the task has been completed.

#### Notifications

- RCDSS must have the ability to select from a list of contacts of who should receive Notifications for each contract. This will include contacts external to RCDSS as well as RCDSS contacts.
- Notification must be emailed to different contacts at RCDSS when an Application is submitted as well as every week until an Application has been Approved or Rejected.
- Notifications must be automatically emailed to different agency contacts each day when a voucher has not been uploaded to the portal.
- Notification must be emailed to contacts at RCDSS each week until a voucher has been Approved or Rejected.
- Notification emails must be sent to RCDSS whenever a message or document has been added to a contract page.
- Notifications must be emailed to external contacts when RCDSS uploads a document, adds a message or changes the contract page in any way.
- Notifications must be sent to internal and external contacts when a task is added.

#### Activity Log

- Log showing all activity associated with a particular contract must be viewable on each contract page - only for RCDSS contacts.
- Notification must be emailed to different contacts at RCDSS when an Application is submitted as well as every week until an Application has been Approved or Rejected.



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#### Trainings For New Vendors

The approximate number of vendors utilizing the portal in 2022 was approximately 135. Approximately 10 new vendors / contacts must be trained each year. The Contractor will provide training to all new vendors / contacts.

Detailed training guides must be available on the portal for 24/7 access.

Technical Support. The Successful Proposer shall ensure the following during the term of the contract award:

- E-mail for technical support must be available
- Responses must be received within 4 hours between 9am and 5pm EST.
- For tech request e-mails sent before 9am or after 5pm EST, responses must be sent within 4 hours of the 9am EST timeframe.

#### Qualifications Of Proposers:

Each Proposer shall provide a Statement of Qualifications which shall include the following:

1. A brief history and description of the entity / firm submitting the Proposal.
2. Identification of the entity / firm's professional staff members who will be assigned to this engagement if the entity / firm's Proposal is selected. Include summarized information regarding the professional staff members detailing qualifications for Workflow Software Services, years and types of experience, education, licensure, certification, accomplishments, etc. Specify the extent of the availability and commitment of each such professional staff member who will be assigned to this engagement if the entity's Proposal is selected. Specify a project manager and contact person to coordinate the services for the RCDSS.
3. Evidence that Proposer at all times obtains and maintains all licensing, if any, required by Federal, State, and Local Laws to perform the services contemplated by this Agreement and all licenses, certifications, and qualifications to perform Workflow Software Services.
4. At least three (3) references with similar Workflow Software operations to the RDSS, with dates of service, client name, and contact information, including mail and e-mail addresses as well as telephone numbers.
5. A signed cover letter from a person within the entity / firm who is authorized to make representations on behalf of the firm and to bind the entity / firm.
6. A summary of the entity / firm's general experience in providing Workflow Software services to municipalities of the same or similar size as the RCDSS, with special attention given to other municipalities.
7. Evidence that the entity / firm has demonstratable experience in Workflow Software service work and shall submit documentation to substantiate their work experience.
8. That the entity / firm has properly trained software support staff who are experienced and, if necessary, certified for each aspect of the ensuing contract.
9. Identification of any services that the entity / firm intends to subcontract to other entities / firms, and identify we proposed subcontractors with their qualifications and contact information, including names, telephone numbers, and mailing and e-mail addresses.
10. Any additional information which would serve to distinguish the entity / firm from other entities / firms submitting Proposals, including, but not limited to, capabilities to perform the Scope of Services on a remote basis.

#### Insurance Requirements

The vendor is required to hold insurance coverage throughout the duration of the contract period. All insurance listed is to be at the expense of the vendor.