Addendum No. 4

Request for Proposals ADM-23-02
ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM SOFTWARE

The addendum is being issued prior to the closing of the Request for Proposals to provide further information, make changes to, or to clarify the Contract Documents and is to be read, interpreted and coordinated with all other parts of the Contract Documents. In the case of a conflict with the balance of the documents, this Addendum shall govern. Proponents shall attach a signed copy of this addendum to their proposal. This addendum shall form part of the Service Agreement.

Question 1: Would it be possible to push the due date for this RFP two weeks to give vendors enough time to incorporate the answers to clarifications in their proposal?

No, the closing date is firm as identified on the Table of Important Dates: Section 6, "Evaluation Process" (Page 16).

Question 2: When does the Regional District anticipate to begin project implementation?

We anticipate the project period to be between July 1, 2023 and October 31, 2023. As identified in Section 3.0, "Proposal Format" (Page 9), proponents should provide a work plan with methodology, start date, milestones and completion date.

Question 3: When does the Regional District anticipate to go live with the new solution?

See answer for Question 2 above.

Question 4: Can you please provide the titles of the members of the proposal evaluation team?

There will be three primary employees reviewing the proposals:
- General Manager of Legislative and Corporate Services
- Manager of Information Technology Services
- Records Management Coordinator

Question 5: What is the Regional District's current solution?

The RDFFG does not currently have an EDRMS system in place. As per Section 1.1, "Overview" (Page 3) we have currently been focusing on managing our physical records.

Question 6: What are the expiration dates for the current solution?

N/A

Question 7: What is the Regional District's annual spend for the current solution (if any)?

We currently do not have a solution.

Question 8: Why is the Regional District seeking a new solution?

We currently do not have an official EDRMS solution at the RDFFG.

Question 9: What functional/operational issues with the current solution and what is the Regional District seeking to improve with a new system?

N/A

Question 10: Has the Regional District purchased the current solution directly or via a wholesaler?

N/A

Question 11: What departments will be utilizing the new solution?

All departments.

Question 12: Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared?

The intended plan is to use a train the trainer method to implement the EDRMS department by department. See Addendum #2, Question #2 for additional information.

Question 13: How many prospective suppliers will be invited to provide demonstrations for this project? Will demonstrations be held onsite?

As per Section 6.0, "Evaluation Process" (Page 16): "Only those proponents short-listed will be invited to demonstrate their software solution in a two-part presentation, expected to be scheduled for June 7, 2023."

Our preference is for vendors to provide a demonstration on-site, however digital demonstrations may be considered.

Question 14: Does the Regional District require live demonstrations vs recorded videos?

The Regional District will require live demonstrations.

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Question 15: How will the Regional District score/rank submitted proposals?

Evaluation will be based on the 5 broad areas as set out under Section 5 and all requirements for proposals as identified in the RFP document.

Question 16: Has a scoring matrix for responses been created? If so, please share. If not, please identify when this will be established and how it will be distributed to bidders.

Please refer to Section 5, "Selection and Evaluation."

Question 17: Has a budget been allocated and approved for this project?

Yes.

Question 18: What is the Regional District's budget for the project?

We are not providing this information as part of the RFP Process.

Question 19: Are there any other systems the Regional District intends to integrate with the solution?

A list of primary software we are interested in considering integration are listed as examples in Section 1.1, "Overview" (Page 3).

Additional software information is also available in Addendum #1, Question #9.

Question 20: What staff and resources does the Regional District have to manage data integration? Is there a preference of the staff to work via API or other approach (e.g. batch file, direct to database)?

Regional District IT Staff will support integrations between vendors. The Regional District have some software development resources so preference is through API. Other processes can be supported as well.

Question 21: Is there a requirement for the vendor to attend virtual/live working sessions with the Regional District team for some of the implementation meetings/workshops?

If implementation can be done digitally then there would be no concerns. Training for the admins would be preferred to be on-site.

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Question 22: Does the Regional District have a preference between DIY solutions requiring the Regional District's technical resources to self-implement the solution or solutions that offer vendor-managed implementation services?

The preference is for the software to have the functionality for the Regional District to implement its own solutions after implementation. This may require some upfront work from the vendor.

Question 23: What Regional District staff have been/will be assigned to the project for implementation?

Please see Addendum #2, Question #12 for additional information.

Question 24: How many users will be admins/power users who may need full system access and/or mass communication access?

Question addressed in Section 5.4.1, "Software Licenses" (Page 15) and Addendum #1, Question 4.

Question 25: How many users will be basic/end users and faculty who do not need system configuration or mass communication access?

Question addressed in Section 5.4.1, "Software Licenses" (Page 15).

Question 26: Has the Regional District seen demos of any potential solutions or related technologies in the last 12 months? If so, which ones?

No.

Question 27: Has the Regional District worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify.

No, the Regional District has not consulted with any vendor on the development of the RFP.

Question 28: How many users will need to scan documents into the electronic repository?

All 75 licenses would need the ability to upload documents into the EDRMS.

Question 29: How many users will need to log in and view documents stored in the repository?

All 75 licenses will need to view documents stored in the EDRMS, however access controls must be possible to restrict access to certain classifications or folders to only select employees.

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Question 30: Will there be a requirement to integrate with your solution and other applications to push/pull data? If so, is there database access to these systems or APIs available?

Please see Addendum #2, Questions 5, 6, 7, and 8 for additional information.

Question 31: Do you support SSO? If so, what is in place today?

We have an Active Directory synced with Azure Active Directory in the cloud.

Question 32: How many documents need to be migrated into the new solution?

There are no documents that need to be migrated from another solution.

Question 33: Will IT be involved in this purchase, and if not, what level of involvement does IT assume for the project?

The Manager of IT will be involved in the RFP review and selection. IT Staff will be supporting implementation.

Question 34: Are there any needs for customized printed documents (Payroll / AP checks, Tax docs, etc)?

Only for generating reports to support the admins of the EDRMS.

Question 35: Are any of the features listed in Appendix B considered mandatory?

Appendix B includes considerations as well as requirements. The requirements are identified under Section 5.0, "Selection and Evaluation" (Page 12).

For example, under section "1. Document Management Functionality", Item #8, is a consideration but not a requirement. Item #11 under the same section is a requirement.

Question 36: Would a proposal that does not support one or more of the features listed in Appendix B be disqualified?

Possibly if it is a requirement identified in Section 5.0.

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Question 37: Would a SOC2 certification be an acceptable alternative to the requirement of "US DoD 5015.2 Certification" listed on page 24?

DoD 5015.2 Certification is desirable but not required (see Addendum #1, Question #3).

Question 38: What types of documents are you looking to OCR?

Most records will utilize OCR (reports, permits, bylaws, contracts, etc). The primary format will be PDF.

Question 39: Is the goal of the OCR documents to make them full-text searchable after OCR has been applied?

Yes. Ideally it should be possible to search text from documents stored within the EDRMS through EDRMS search functionality (i.e. find all documents in classification "01-1234" that contain the word "George").

Question 40: Is there a requirement to extract the text from the OCR results and then pass those into other systems, either through APIs or writing the data directly into a database?

No – there is no anticipation of the EDRMS feeding other systems at this moment.

Question 41: How many TB's are in the Regional District repositories?

Addendum #2, Question #8, addresses the amount of records in HUB.

Our Shared Drive contains approximately 1.76 TB of files, however we believe that the majority of these files are redundant, obsolete and transitory and only a fraction of these files would be considered records as defined by the Regional District's Corporate Records Management Program.

Date: May 5, 2023

_____   _____
  Signature of Proponent   Name of Proponent

Inquiries relating to this RFP may be directed to:

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