Allegheny County
Department of Human Services
Request for Proposals Q&A
RFP for Contract Workflow and Provider Services Management

February 26, 2024

#	Question	Response
1	**Thanks for the opportunity. However, after reading through the RFP, our organization is not HIPAA certified. We just received our SOC 2, Type 1 certification, but we aren't type 2 certified yet either. If those 2 requirements aren't actual requirements, we can submit something, but at this point, we cannot meet them.**	We have amended the RFP to be less specific regarding both HIPAA and SOC 2 compliance. Instead of requiring certification, we now ask that Proposers describe the security measures in place to protect Protected Health Information (PHI).

Amendments

February 26, 2024

The RFP has been amended to lessen restrictions regarding compliance for System and Organization Controls (SOC) 2 Type 2 and Health Insurance Portability and Accountability Act (HIPAA). This change is reflected in the following sections:
- Acronyms and Definitions
- Section 2: What DHS Is Looking For
- Section 3: Proposal Requirements and Evaluation Criteria
- Response Form

We realize the requirement as previously written could deter prospective Proposers with the capacity to offer a strong Solution that fits our needs. We will work collaboratively with the Successful proposer to ensure adequate safety measures are in place to safeguard Protected Health Information and (PHI) and satisfy security audits such as System and Organization Controls (SOC) 2.

In addition, we will be extending the question and submission deadlines by 1 week to allow more time for proposal development.

The amendments are outlined below:

Acronyms and Definitions

19. SOC 2 ~~Type 2~~: System and Organization Controls 2

Timeline

	Original Deadline	**Extended Deadline**
Questions Deadline	~~Friday, March 15 at 3 p.m. Eastern~~	Friday, March 22 at 3 p.m. Eastern
Last Q&A Website Update	~~Thursday, March 21 at 6 p.m. Eastern~~	Thursday, March 28 at 6 p.m. Eastern
Submission Deadline	~~Thursday, March 28 at 3 p.m. Eastern~~	Thursday, April 4 at 3 p.m. Eastern

Section 2: What DHS Is Looking For

Implementation Plan

The Successful Proposer must offer a strong plan for implementation of the Solution. Proposals must outline the Proposer's capability to:

- Support DHS with building out our custom contract workflows.
- Integrate with the existing application ecosystem including an in-house Oracle Data warehouse, Oracle Cloud and JD Edwards (See Appendix A for more information).
- Implement a software solution to support new contracts within six-months of award.
- Migrate historical contract data.
- Offer initial and on-demand employee and service provider training on the new system.
- ~~Demonstrate the compliance of the system with applicable federal and state requirements including System and Organization Controls (SOC) 2 Type 2 and Health Insurance Portability and Accountability Act (HIPAA).~~
- Demonstrate that the platform employs adequate security measure to safeguard Protected Health Information (PHI) and satisfy security audits such as System and Organization Controls (SOC)2.
- Meet accessibility standards such as American with Disabilities Act (ADA) and (Web Content Accessibility Guidelines (WCAG) 2.0.
- Host and process all data within the United States

Section 3: Proposal Requirements and Evaluation Criteria

Implementation Plan (20 points possible)

- 6-month timeline and implementation plan that includes details for how the Proposer will: (20 points)
  - Support set-up of custom contract workflows (5 points)
  - Migrate historical contract data (5 points)
  - Offer initial employee and service provider training on the system (5 points)
  - ~~Demonstrate the compliance of the system with applicable federal and state requirements including SOC 2, ADA, and HIPAA~~ (5 points)
  - Demonstrate adequate security measures and compliance with ADA standards (5 points)

Response Form

Implementation Plan (20 points possible)

7.e. Provide evidence that your Solution complies with applicable federal and state accessibility requirements such as ~~including~~ ~~SOC2,~~ ADA, ~~and HIPAA,~~ and that data is hosted withing the United States (5 points)

February 29, 2024

#	Question	Response
2	**We would like to confirm that the use of the word Provider is not used to represent a physician or practitioner (as is sometimes used in healthcare), but instead is referring to community partners, vendors and consultants who provide services to the Allegheny County Department of Human Services. If the use of Provider also includes Physician contracts what would that volume be?**	Yes, the term "Provider" as used in this RFP refers to the vendors contracted to provide services for DHS.
3	**Can you clarify what type of data from the contracts you would want to share with each of these different stakeholders so we can better understand the level of integration which may be required?**	We would want access to the data primarily for reporting purposes, including contracts, allocations, funding sources and any KPIs that we choose to measure to enhance our operations.
4	**Are you looking for a vendor portal that is separate from the Contract Management Platform where certain data from the system would be made accessible?**	We're interested in a Solution that will allow different parties to access different/necessary information. Vendors do not need to have a separate portal, but standard Role Based Access Control (RBAC), or other ways of controlling what data is visible based on account type, should be utilized.

#	Question	Response
5	**Can you provide a use case or two so we can understand better what your requirements are, including how each of the stakeholders specified would utilize that data?**	As a financial supervisor, I would need visibility into vendor contracts, allocations, and funding sources, so I can pair them with claims to date and monitor project/vendor spending. As a contract owner, I would need visibility into current and historical contracts, allocations, and funding sources for all the contracts I manage so I can plan and monitor. As a data analyst, I would need to be able to access similar data as the previous roles mentioned to create visualizations and run reports to help contract owners and financial staff monitor vendor allocations and spending. As compliance staff, I would need to check that contracts and allocations are assigned to the correct funding sources.
6	**What is the frequency of the downstream data flows? Are they required real-time, batched on a monthly basis, quarterly, etc?**	We anticipate a variety of service-level agreements (SLAs) but no requirement for real-time streaming data. However, we will need the ability to batch data daily and possibly more frequently.

March 04, 2024

#	Question	Response
7	**For organizations who are working towards achieving WCAG 2.0 compliance, but who are not presently able to offer products that are fully accessible, is Allegheny County Department of Human Services open to working with those vendors, or would that vendor be disqualified from the RFP review process?**	No, the vendor would not be disqualified. As a human services agency, we strive to ensure our web content is as accessible as possible. However, we are most concerned about the Proposer's ability to meet requirements under ADA. DHS will collaborate with the Successful Proposer to ensure web content accessibility is met according to our needs.
8	**6.3 on HIPAA Compliance - In our experience, patient information (including PHI, PII and PCI data) is not stored in a Contract Management Platform. There is a requirement in the RFP that the system be HIPAA compliant, which we believe might not be applicable for this particular set of products.** **Can you confirm that the HIPAA requirement is not required, or can you**	We have updated the RFP to be less specific concerning HIPAA compliance. Instead of requiring certification, we now ask that vendors describe the security measures in place to protect Protected Health Information (PHI). While we certainly try to limit health related information within the system, clients are often linked to services as part of the claims and payment functionality, and the data would need to be adequately protected, so we need to know what security measures can be provided for this data.

	provide some use cases where you would anticipate storing patient related information in the Contract Management system?	
9	How many Active contracts do you anticipate will be stored in the Platform? We define Active Contracts as contracts that have been started, are in process, executed or expired, but that have not been archived.	There are approximately 10,000 contracts stored in our current platform. That number grows by approximately 450-600 contracts per year. The majority (90%) of these are considered rollovers – new contracts for the upcoming Fiscal Year that are derived from existing contracts for the current Fiscal Year. The remaining minority (10%) are new contracts for providers that are entering the system for the first time.
10	How many new contracts do you anticipate will be added to the system each year?	Each year, we anticipate adding 450-600 new contracts. The majority (90%) of these are considered rollovers – new contracts for the upcoming Fiscal Year that are derived from existing contracts for the current Fiscal Year. The remaining minority (10%) are new contracts for providers that are entering the system for the first time. As an example, approximately 540 contracts were added to the system in FY 2023-24.
11	Are these Service Providers the community partners, vendors and consultants who provide services to the Allegheny County Department of Human Services? Or is a Service Provider something different?	Yes, service providers are the vendors contracted to provide services for DHS.
12	If Service Providers are the community partners, vendors and consultants: How do these external organizations login and access the MPER system currently?	Our service providers have access to a limited view of the same contracts management portal that our internal staff use.
13	If Service Providers are the community partners, vendors and consultants: Of the 4500 application users, what percentage of them are DHS employee's vs non-DHS employees?	Roughly 75% of the application users are DHS employees, totaling approximately 3400, while the remaining 25% are community partners, totaling around 1100. Approximately 65% of the accounts are deemed inactive, with the distribution fairly even across different account types.
14	The system will be used for contract workflow, service provider	Our expectation is that this portal will serve as the primary platform for our providers to

		management, service provider allocation data management, provider budgeting, and invoicing. Traditionally invoicing and provider budgeting would reside in a financial system instead of a Contract Lifecycle Management system. Can you clarify the expectations of the system in each of these different areas?	enter and track their contract approval and execution processes. Additionally, they will submit invoices for payment through this portal to avoid the need for multiple interfaces. Once approved, invoices will be processed in Oracle JD Edwards.
15	How many contracts are you anticipating on migrating to the new system?	We anticipate migrating all of our contracts into the new system. There are approximately 10,000 contracts stored in the current platform.
16	Can you please clarify Section 6.6 on Language diversity Requirements? We have never seen this requirement being managed by the vendor before. In most cases the organization that the participant/consumer/client is responsible for providing appropriate accommodations for their staff which may include interpreters, assistive devices, etc. As a vendor we don't provide these services to our customers. Can you provide more detailed information on this requirement for us to review? If we are unable to meet this requirement, would our response be disqualified?	If any resources for individuals with limited English proficiency or other communication barriers are necessary, DHS will collaborate with the Successful Proposer to make these resources available. The Successful Proposer must ensure they will collaborate with DHS to successfully meet this standard. This is a DHS standard for contracting, but it will not be used to evaluate or disqualify your proposal. Any contract award is contingent upon the County's Executive Action approval process and successful negotiation of the budget and final contract terms.
17	Is there a defined and approved budget allocated for this project? If so, what is the authorized spend threshold?	There is no limit to the total budget that Proposers may propose. DHS is interested to see Proposer's proposed cost for the Solution. All costs must be justified and explained in the Proposal. DHS will consider all proposed costs for reasonableness and will negotiate and agree upon a final budget with the Successful Proposer.
18	How is the county currently managing provider data (onboarding and management of data)?	We currently have a custom-built system to support this entire workflow and it integrates with an Oracle Data Warehouse where the data is stored.
19	The County currently uses Bonfire as its solicitation platform and for bid/response submittal and management. With this solicitation:	We are not seeking to replace Bonfire. We are seeking a qualified Proposer to provide a user-friendly Software as a Service (SaaS) solution for contract workflow, service

	A) does the county want respondents to include a proposed integrated alternative (i.e. solicitations/sourcing module) as part of their solution? B) is it the County's intent to retain Bonfire and would want the deliverables under this new RFP to be integrated into Bonfire? C) Is it the County's intent to keep Bonfire as a stand-alone tool as-is?	provider management and allocation data management, as well as provider budget and invoicing. Selected DHS applications the Solution must provide connectors or application programming interfaces (APIs) for custom integration, can be found in Appendix A of the RFP.
20	After re-reviewing your requirements, it seems like you are looking for a way to not only manage contracts, but also generate them, assign workflow status and connect to DocuSign, etc. We don't do that piece. Our contract management module is simply that... a way to manage all of your contracts.	The ability to integrate with DocuSign is a bonus, but it's not a requirement. We do not require this tool to generate contracts.
21	Is there an online listing of VOSB vendors available for searching for potential partners/subcontractors?	A listing of Small Businesses, Small Diverse Businesses, and Veteran Business Enterprises (SB, SDB, and VBE) can be found at www.dgs.internet.state.pa.us/suppliersearch.
22	Are any users external? Is there a need for any sort of public facing portal/vendor hub?	All users who access this interface will be logged in users, including external providers.
23	How many Primary users are there?	Details about our users can be found in the answer to question #14.
24	Do secondary users have login access to MPERS? Or they only view information from MPER that is pushed into their other various symptoms.	We'd like to have the ability for secondary users to have view-only access to contract information in the new system.
25	What vendor support is required for the API custom integrations?	Our preference is for vendors to provide out-of-the-box integrations or connectors to common systems such as Oracle data warehouse, which we can then customize. Alternatively, we are open to partnering with a vendor to develop these integrations directly. However, if necessary, we can build these integrations ourselves, provided that the vendor platform supports API-based integration.
26	Please expand on section 6.6. How does the department anticipate this being supported within a solution?	Please see the response to question #17.

#	Question	Response
27	**Could DHS provide some examples of simple and complex contract workflows including related criteria?**	Typically, contracts adhere to this process: they are entered into the system, approved by the fiscal team, approved by the contracts team, and then forwarded for Executive Action. Occasionally, the workflow may become more complex, bypassing certain steps or even going backwards in the workflow.
28	**We are a small company and we do not have or cover Commercial Automobile Liability Insurance. Can we still participate in this?**	You may still apply, but all Successful Proposer's must be able to meet the necessary insurance requirements prior to execution of the contract. If you wish to include the cost of the insurance in your proposed budget, you are welcome to do so.

March 07, 2024

#	Question	Response
29	**Workflow/Contract Approvals are very prominent in this RFP. Can you provide an example of the ideal workflows your team is looking for?**	At a high level, our contract approval process involves obtaining approvals from Program Directors, the DHS Director, and the Allegheny County Manager. The system we procure must facilitate these approvals for every contract action.
30	**The Purpose notes a requirement component of "allocation data management". Can the County clarify or define exactly what is meant by "allocation data management"?**	A contract allocation is the amount of funding DHS has agreed to reimburse a services provider or vendor for contracted services over a defined period of time. In order to ensure DHS's contracted allocations are appropriately budgeted for, we must have the ability to access allocation data and perform aggregations to create analyses that support decision-making.
31	**Please elaborate on what the department is looking for relative to Data Management and how data should be validated.**	Downstream data is needed for a number of activities that include but are not limited to: addressing correspondences to appropriate vendor contacts; budget planning, monitoring and reporting; service mapping and location decisions. The system we procure must enable data infrastructure and governance that supports these downstream needs/activities.
32	**Could DHS provide additional detail on the type of functionality that is needed to support "budgeting and invoicing?"**	The necessary functionality to support budgeting and invoicing includes the ability to set contract allocation amounts, as well as the ability to receive and enforce a template

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		for vendor invoices against contracted allocations.
33	**Could DHS elaborate on how the envisioned contract workflow system would incorporate "billing data?"**	The envisioned contract workflow system plays a crucial role in ensuring service providers and vendors receive reimbursement in accordance with their contract terms. Specifically, the system will maintain billing rates for services contracted on a Fee-For-Service Basis. Vendors or service providers reimbursed under this basis will submit claims through program-specific claiming systems, such as the Client Information and Payment System, and the resulting claims data will be matched to rates data stored in the system being procured, facilitating reimbursement. Additionally, vendors or service providers who do not use program-specific claiming systems will submit invoices through the newly procured system.
34	**Are the budgets for this project/program approved and ready to start if/when you make the solution decision?**	Yes.
35	**Other than the solution, are there other factors that would impact your decision-making process?**	We will base our decision on the Proposer's ability to meet the expectations outlined in Section 2 of the RFP and the proposal requirements and evaluation criteria outlined in Section 3. Please also see Section 5: How DHS Will Evaluate Your Proposal.
36	**Should we expect a Demo or orals after the submission? If yes, please provide respective timelines.**	As mentioned in Section 3 of the RFP, DHS anticipates inviting a select handful of Proposers to participate in Oral Presentations to demonstrate their Solution. This is no guarantee your Proposal will be shortlisted for selection, and we cannot guarantee when exactly these demonstrations will occur, but currently, we anticipate demonstrations may take place in early or mid-May.

March 11, 2024

#	Question	Response
37	**Please share which software system within DHS is performing the purchasing and invoicing process. Are they separate systems or within one**	We use a variety of systems and templates for this process. Some of this is done in OnBase, some in Oracle JDE, and some in custom systems.

	system? Is this part of the legacy system which is likely to be replaced?	
38	How many templates do you use like NDA Agreements, Clauses, MSA, etc.?	Please see the response to question #37.
39	Contract workflow: How many different types of contract workflows are in place today?	We have one primary workflow, but steps may be skipped, and the process may go backwards in the workflow from time-to-time. Having support for multiple workflows would be advantageous for the solution.
40	Are the mentioned functionalities expected in the new solution: Requisition, Purchase Orders, Invoicing, Supplier Lifecycles for supplier evaluation and performance, Budgeting?	We do not use our contracting system for requisitions or purchase orders. We do not expect it to generate invoices. Supplier lifecycle management and budgeting would be useful to have.
41	If the functionalities mentioned above are required within the new solution, do we need to migrate historical data for these as well? Additionally, what is the size of the historical data which needs to be migrated?	All historical data must be migrated - it's not large in size but there will be thousands of records.
42	Do you plan on continuing to utilize OnBase for Document Storage even if the solution stores the contracts and other related documents?	Yes.
43	Do you already have any middleware integration tool, or will this solution be required to provide that as well? What are the number of integration points required within this solution?	Please see the answer to question #25. The number of connections is somewhere between 10-20.
44	Which Identity and Access Management (IAM) solution is currently being used? Does the proposed solution require Single Sign On with the current IAM solution? Do you currently support both B2B and B2C with existing IAM solution? If not, will the required solution be developed to support these functionalities?	We currently support OKTA for IAM. Integration is not required but the preferred solution will incorporate OKTA for sign-in.
45	Will data migration from legacy system be a one-time activity or will there be a need for ongoing migration?	This depends on the timeline for implementation, but our hope is to be done migrating data when the implementation is complete.
46	What is the technology stack of the legacy system to be replaced?	It's a mix but primarily Oracle 19C, C#, and .NETFramework

47	Does the solution need to have the ability to edit/update existing contracts in a workflow manner?	Yes, that's likely to be something that we need.
48	Can we submit the W-9 and the required DHS documents with the response form, or do they need to be submitted before the response form?	Proposers should submit a complete Proposal with the required documents altogether. Please see Section 4: How to Submit a Proposal for more details.

March 18, 2024

#	Question	Response
49	Are you considering a single-phase, multi-phase implementation?	We're open to either option but we do hope to have new contracts in the system by End of Year.
50	Do you want a flexible solution that adapts to your specific needs, or do you want our help in designing processes, informed by our best practices? Would you like a balance of the two?	Both approaches would be helpful.
51	Please prioritize the following issues to solve in your CLM initiative (if irrelevant, you may indicate so): a.) Lack of central repository b.) Enforce contract processes/compliance c.) Improve slow review cycles d.) Enforce signature policies e.) Manage contract renewals/expirations f.) Track post-signature obligations g.) Reporting on non-standard clauses/terms, metrics on negotiation h.) Streamline contract requests & visibility i.) Streamline/simplify approvals j.) Identify non-standard terms and mitigate risk via review k.) Automate contracting processes l.) Integrate CLM to PeopleSoft and other systems m.) Identify, quantify, or track risks (such as deal, regulatory, geographic, strategic)	Of these options, the most important to us is to streamline and simplify contract workflows and approvals to improve slow review cycles.
52	Are there any missing priorities? If so, what?	No.

53	In addition to the above do you have interest to explore solutions for the following (if irrelevant, you may indicate so): a.) Supplier onboarding and management b.) Sourcing event management (RFx) c.) Legal matter management d.) Supplier performance reviews e.) Supplier portal for submission of documents	The proposed Solution should allow providers to submit documentation, however, we are not interested in the other items. For requirements of the Solution, please review Section 2: What DHS is Looking For.
54	Are there any missing critical capabilities needed? If so, what?	Please review Section 2: What DHS is Looking For and the Q&A document corresponding to the RFP, which contains all questions asked by potential proposers and the response provided by DHS.
55	Have you developed policies or workflow that outline your current and/or "to be" process? a.) Can they be shared now? b.) Can they be shared later? c.) Are they in development? d.) Are they not available to share?	Please see the response to question #27 & #33. We will not be sharing more details at this point, but we are engaging in process improvement and mapping right now to support this effort.
56	Are you replacing another CLM solution?	We are replacing a custom-built solution.
57	Do you currently have any of the following currently established that need to be considered in relation to a CLM system? (if any of these can be shared now, please do): a.) Authority matrix b.) Change management plans c.) IT system diagrams d.) Workflow diagrams for needed integrations e.) Communication plans	We will have all the required information available for implementation.
58	Please list the types of contracts and other documents you would like stored in the CLM (buy-side, revenue side, other legal agreements).	Please see the response to question #37 and #40.
59	How many contract types do you currently have?	Please see the response to question #37 and #40.
60	How many contract templates do you currently have?	Please see the response to question #37 and #40.
61	How many new contracts do you initiate per year?	Please see the response to question #9.

62	Does each contract type require a different set of data points, or are there common intake forms for all procurement contracts, all sales contracts, etc.?	New providers are sent the same forms regardless of contract type (i.e. New Vendor Creation forms, W-9) and based on current system requirements. Rollover contracts require less data points as they are already vendors in the system. During the RFP process, applicable forms are pulled from Bonfire and loaded into the new system.
63	Do you need to generate agreements in bulk (yearly amendments for example)?	Yes. Each year, a portion of contracts are converted to multi-year agreements, in addition to 150 rollover contracts, and 300 amendments to current contracts. Amendments are done on a quarterly basis. Some contracts may have as many as 10 amendments or just one.
64	How much of your contract population is third-party paper?	While there are multiple agreements that use the Contractor's original contract language, there is currently no data point to pull against for the number of third-party paper contracts.
65	Are you currently able to use templates when drafting a new contract?	Please see the response to question #37 and #40.
66	If you are currently using templates (your paper) how many would you like to implement in Agiloft initially?	Please see the response to question #37 and #40.
67	The structure of your templates impacts the level of effort they would require. Are you able to share your most and least complex templates with us?	Please see the response to question #37 and #40.
68	How many legacy contracts or supporting documents are you anticipating importing into Agiloft? Does that include parent/child contracts and supporting documents?	Please see the response to question #9.
69	Are you capturing any metadata in your agreements? What are you tracking and/or what would you like to track?	No, and we are not currently interested in that.
70	Do you have structured metadata for your legacy contracts?	No.
71	Are you able to extract your legacy contracts and data from its current location(s)?	Yes.
72	How are you currently managing contract approvals (via email, a current CLM, with a separate tool, differently	We have a custom-built system that we are replacing.

	depending on the department withing MHS)?	
73	How many steps are in your current approval process?	Please see the response to questions #27 and #33
74	Is one of your initiatives to simplify this approval process?	We are engaging in a process mapping and improvement process right now to find areas of improvement.
75	Is there much variation between how different departments manage their contract approvals?	All departments use the same process, as things are right now. We have a few different workflows for different contract types.
76	How many different business units/departments will be included in this implementation?	Approximately 5.
77	Do you currently have a clause library or playbook that your legal team is able to reference during contract negotiations? Is there a need to access this from the CLM tool and report on clause use and modification?	There is no need for this.
78	Does your organization need to generate multi-party agreements?	Possibly, but that is not in scope for this effort.
79	Is there any need to track other documents or authorizations with your contracts? (i.e. POs, CIOs, Invoices etc.)	This is something we could be interested in, but it is not in scope for this effort.
80	Please describe any contract renewal/expiration/termination/closeouts workflows that apply to your contracts.	We renew contracts on a one-to-three-year period with allocations added each fiscal year. There is no system workflow for contract expiration/closeout. There is a 90-day termination clause for Contractor Termination and/or County Termination, while Non-Appropriation/Insufficient Appropriation contracts end on a specific date or amendment to reduce funding and scope.
81	Do you need to track your obligations or receive automated notifications when obligations are met?	Yes.
82	Is there a need for other users to be able to access executed contracts?	Yes. Many internal users will access these.
83	Are there any "non-contract" documents that require approval or review?	Yes, we would prefer the ability to provide review or approval across many types of documents.
84	Do you use Microsoft Office Suite? Outlook, Word, Teams, etc..?	Yes.

85	Do you use G-Suite? Gmail, Docs, etc…?	No.
86	Does your organization use a Single Sign-On provider that you would like to enable? SAML 2.0, LDAP/AP, etc…?	Please see the response to question #44.
87	Sometimes our clients want to maintain master data in other various systems. For example, employee master data may be in Active Directory or an HR system, Cost Center data could be housed in your ERP or accounting platform, Customer data may be in an ERP or CRM, and so on. Where do you want to maintain the master data, and how would we access it?	The master data will be stored in the platform or Oracle. There is adjacent data that will need to be ingested from a variety of sources, as described in the RFP. The Successful Proposer will be able to assist with building these integrations.
88	Does your integration to and any other external system need to be in real-time or intraday (DHS Data Warehouse, Oracle Cloud, Oracle JDE, others…)?	We require the ability to run, at the least, daily batch jobs.
89	iPaaS is a technology that facilitates system-to-system communication that are not natively designed to speak with one another. It simplifies and lowers the cost of real-time integration rather than writing API-to-API integrations. Do you currently use an iPaaS or Middleware? If yes, could you identify which software you use and explain its functional process?	We do not use any of these solutions.
90	Is there any data you would like to migrate into your repository that we have not asked about previously?	No.
91	Please describe your contract process today and the major pain points	Please review the RFP and Q&A document corresponding to the RFP, which contains all questions asked by potential proposers and the response provided by DHS.
92	Do you have an approval matrix or approval steps that you'd like automated in the CLM?	Possibly but we don't have this in our current process.
93	How do you manage contract workflow now?	Currently, we manage our contract workflow by using our custom-built system.
94	How do you store contracts now?	We store contracts through OnBase and our custom-built system.
95	How do you store templates now?	We store templates through OnBase and our custom-built system.

96	When do you want to go live with the CLM? What is driving the date and what is the impact if you miss it?	We are hoping to have contracts in the system by End of Year.
97	Has this project been funded or are you in the process of gaining final project approval?	Please see the answer to question #34.
98	What is the process for onboarding and maintaining suppliers?	Currently, after the RFP solicitation process, the Successful Proposer would be notified via a 'Notice of Intent to Award'. At this time, if the Successful Proposer is a provider new to DHS, they must submit a New Provider Application with other supplemental documentation. Once this is complete, or if a provider is already contracted with DHS, they'll move to the next step with DHS Contracts Unit to gather all necessary information for the contracting process. While this occurs, the final recommendation for the contract award will undergo the County's Executive Action, MWDBE and VOSB approval processes. Contract terms and the final budget may be negotiated at this stage, after which the contract will be signed off on by both parties. A rollover contract generally goes through a similar process.

Notably, we are conducting a business process improvement effort in preparation to onboard the new tech and this process may change as a result. |
99	Do you complete risk assessments on Suppliers? What is the current process and ideal process for the future?	This is not in scope for this effort.
100	How will you measure the success of this project?	We will assess success by metrics such as the time it takes to execute a contract, user experience, provider and user feedback, and data quality.
101	How many discrete people will serve as business and IT admins of your CLM solution?	We will have less than five IT Admins but dozens of business admins who can update and manage contracts and allocations.
102	Aside from admins, how many users of the system that need to work on or edit contracts (theirs or others), approve contracts, and/or edit contract requests?	Please see the response to question #13.

103	How many people will only approve contracts when necessary?	We plan to manage workflows that involve, at minimum, 5 staff at approver levels, and staff in at least three units (contracting office, contracts unit and finance unit). We are conducting a process improvement effort in preparation to onboard the new tech and the final number of approvers may vary as a result.
104	How many people will be allowed to make contract requests and/or search the repository?	Please see the answer to #13.
105	How many requesters are allowed to send contracts off for signature? Would you want requesters to have a self-service access to the system where they could send non-negotiated contracts like NDAs?	The Contracts Unit, which resides in our Office of Administration, sends contracts off for an approval workflow to all necessary staff within the County. At the end of the contract workflow, the agreement is executed via DocuSign. To the second question, no.
106	Are there any restrictions on utilizing resources from outside of the USA for implementation or configuration of the solution?	All data must remain in the United States. Using offshore resources is allowed but may be complicated with our firewall and security concerns, so a domestic team is preferred.
107	"Roughly 75% of the application users are DHS employees, totaling approximately 3400, while the remaining 25% are community partners, totaling around 1100." What are the account types and access privileges for the users?	Please see the response to question #103.
108	Regarding historical data: all historical data must be migrated - it's not large in size but there will be thousands of records. Is there data in the OnBase managed documents that the County would need to include in the data migration?	Not at this time.
109	Does the agency have any preferences for the business rules engine such as Frools, Corticon, or In Rule?	No, we do not use any of these.
110	Can the agency specify the volume of data to be migrated along with their size in GB?	No, we don't have an accurate count for this right now, however, we anticipate it should be manageable.

111	The agency has specified the system to be available within 6 months. What is the anticipated Go-Live date for implementing this solution? When will the agency award this contract?	We expect to select the Successful Proposer in May or June and hope to go live by the end of the calendar year.
112	As this opportunity has a MWOSB/VOSB goal, are there any bonus points included for the same?	No. All DHS providers are required to meet these goals or demonstrate a "good faith effort" in doing so. For more information regarding MWDBE and VOSB goals, please refer to Section 6.1 and 6.2 of the RFP.
113	Has the agency seen demonstrations of any solutions prior to the RFP release? If so, can you share the solution details?	We have not seen any demos specific to this RFP although we are familiar with many of the tools that are available for such purposes.

March 19, 2024

114	The RFP is silent as to how any exceptions to the standard terms and conditions may be handled. We note that there are certain standard commercial provisions critical to the success of both parties which are either missing from the RFP or which will require discussion and negotiation to arrive at a final set of terms that reflect a reasonable alignment of risk for the proposed engagement. Can the County please provide guidance on how any exceptions should be identified in our proposal?	If you believe there are critical components to provision of the Solution absent from the RFP to agree upon between DHS and the Successful Proposer prior to completion of a fully executed contract, you are welcome to identify them and discuss how you would propose to mitigate any potential challenges within your Proposal. The final contract and contract terms will be negotiated in collaboration with the Successful Proposer.

March 21, 2024

115	Would DHS be open to investigation other electronic signature solutions if a vendor could provide this?	Yes, although we do need to integrate with processes across the County, some of which use DocuSign.
116	Can you please provide the titles of the members of the proposal evaluation team	No, not at this time. If you are selected to provide a demonstration for the Evaluation Committee, you are welcome to ask for introductions then.
117	What solution(s) are currently in use that the new solution would be replacing (please include versions)?	Please see the responses to questions #18, #46.
118	Is the current solution on-premises or hosted in the cloud?	Our current solution is on-premise.

	Question	Response
119	**Which department(s) are using the current solution(s)?**	All departments use this system to track providers and contracts.
120	**For future growth, how much additional storage do you anticipate needing annually**	We add approximately 500 contracts per year and some associated documentation but do not anticipate having large storage needs.
121	**What is the total number of unique document types?**	Most documents will be in PDF form. We also anticipate needing storage for other standard document formats like doc/docx, xls, etc.

March 25, 2024

	Question	Response
122	**How many unique forms are currently in use?**	While onboarding new providers, roughly five forms are needed that currently exist as external documents but may change to more internal forms. Additionally, current system forms include a planning module, budget builder module, and other unique form fields in the workflow.
123	**How many workflow routing rules do you have? Which ones make updates to your business\SIS apps?**	We are unable to quantify the number of routing rules, but the current contracting system (MPER) workflow contains a number of touchpoints by various DHS staff, as well as external County Department approval routes. The system also integrates with several other applications, as mentioned in the RFP. Notably, we are conducting a business process improvement effort in preparation to onboard the new tech and the workflow will change as a result.
124	**What functional/operational issues are there with the current solution and what is DHS seeking to improve with a new system?**	Please refer to Section 1: Why DHS Is Issuing this RFP.
125	**When does the current contract(s) for the current solution(s) expire (if any)?**	We built and control this system. No subscription applies.
126	**What is DHS's annual spending for the current solution(s) (if any)?**	The annual average spend is difficult to extrapolate as this is a custom-built system for which costs are imbedded into our overall maintenance budget. Once selected, we'll work collaboratively with the Successful Proposer to provide any

		relevant information for successful implementation
127	**Has DHS purchased the current solution directly or via a reseller? If reseller, which one?**	Please see the response to question #125
128	**Will shortlisted vendors be invited to provide demos in person?**	Demonstrations will likely take place virtually. If we require an in-person demonstration, shortlisted vendors will be notified.
129	**Are there any requirements that if not met will result in automatic disqualification?**	Regarding the submission of your proposal, no; as long as you submit documentation for all mandatory items requested. The Evaluation Committee will determine from your Proposal if they feel your organization is the best qualified to provide the Solution we're seeking.
130	**Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared?**	We will work with the Successful Proposer to create this plan.
131	**Are there any other systems DHS intends to integrate with the solution?**	Please refer to Appendix A: Selected DHS Applications.
132	**What staff and resources does DHS 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)?**	The Successful Proposer will support common and custom integrations. However, when this isn't possible, we have the resources to build the integrations. The Successful Solution will support API integrations.
133	**What Institution staff have been/will be assigned to the project for implementation?**	All of the appropriate stakeholders and teams will be available for implementation.
134	**Has a budget been allocated and approved for this project?**	Yes.
135	**What is DHS's budget for the project?**	Please see the response to question #17.
136	**Has DHS seen demos of any potential solutions or related technologies in the last 12 months? If so, which ones?**	Please see the response to question #113.
137	**Has DHS worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify.**	This RFP was developed in-house.
138	**What is the total count of documents currently stored that need to be migrated?**	We do not have this answer at this time. Probably between 5-15,000.
139	**How many different contract document types need to be migrated?**	Please see the responses to questions #37 & #40.

140	Are there multiple sources for this migration or will they all be coming from OnBase?	Most of our historical data is in an Oracle Data Warehouse.
141	Do the documents have annotations that will need to be migrated?	No.
142	What are the different file types that need to be migrated (e.g. pdf, docx, txt etc.)	Please see the response to question #121.
143	What is the average file size of the documents being migrated?	We do not have the answer to this question, but they are not large documents. Standard 1–2-page PDFs are the most common.
144	Does the 6-month timeline include completion of migrating the historical documents or just the implementation of the new solution? Is there a timeline requirement for the migration of historical documents?	We will coordinate on the timeline with the Successful Proposer, but it's not required that the historical migration be complete in this calendar year.
145	How many different custom contracts and/or related forms and workflows is DHS planning to have live at the end of the 6-month timeframe?	The Successful Proposer will be able to implement all current contract workflows for new contracts in the proposed timeframe.
146	Do you own the OnBase Document Import module?	Yes.
147	For the Primary and Secondary users, how many users are internal DHS employees versus Service Providers?	Please see question # 13.
148	How many DHS employees will need access to the tool, and how many will need the ability to edit, modify, or create workflows?	Please see question # 13 for the type and number of DHS application users. Active DHS users will need different levels of editing the workflow based on their roles (i.e. Contract Owners, Program Leads, Fiscal Leads, Approvers, etc.).
149	Can you provide clarification on the ask of the following requirements in the Proposal Information section of the Response Form? a.) Total dollar amount requested b.) Proposal summary (please only use one sentence)	The first question asks Proposers to provide the total dollar amount requested in their proposed budget. The second question asks Proposers to summarize their Proposal in one sentence. If you feel your proposed Solution cannot be summarized in sentence, you're welcome to skip that question.
150	Of the 3400 DHS employees and 1,110 non-DHS employees outline in question #13, can you clarify how many of these users need edit/write access and how many are read-only?	Please see question # 13 for the type and number of DHS application users. Active DHS users will need different levels of editing the workflow based on their roles

		(i.e. Contract Owners, Program Leads, Fiscal Leads, Approvers, etc.).
151	**How many unique forms are currently in use?**	While onboarding new providers, roughly five forms are needed that currently exist as external documents but may change to more internal forms. Additionally, current system forms include a planning module, budget builder module, and other unique form fields in the workflow.

March 26, 2024

152	**Can Allegheny County provide additional information about the users of the system so we can accurately determine the required licenses? Specifically, what are the types of users, number of users, and their roles? For example:** **a.) Core Internal Allegheny County Users - how many users are heavy users of the system that manages contracts and providers daily?** **b.) Internal Allegheny County Program Users - how many users are program users that conduct occasional functions in the system to support the process such as review, approve, and update program specific information?** **c.) Provider Users - how many users are provider users and what are typical functions they will conduct in the system?** **d.) Provider Users - how often do providers utilize the system (i.e. daily, weekly, monthly, annually)? If different types of providers have a different frequency of usage could Allegheny County provide counts by each usage/frequency type?**	a) There are roughly 1,200 active DHS users, estimating around 150 core internal users (Program Office, Contract and Fiscal users). b) We estimate roughly 50 internal program office users in this role. c) There are roughly 450 active community partners using the system, with 1-5 users each. They will primarily input and update organizational information, contact information, some contract data, and they submit monthly program funded invoices. d) Provider users have a higher frequency of use at the beginning of contracting, and then utilize the system at least on a monthly basis after a contract is executed for invoicing purposes.

153	How many users will be logging into the system on a daily basis vs more infrequently?	Please see the response to question #13 and #152.
154	What data outside of the approx. 10,000 contracts will need to be migrated? Is all information in the current system contained within the 10,000 contract records?	There are some documents like invoices that are attached to the contracts that will need to be migrated or linked to historical contracts. Additionally, we will need to migrate information about funds, services, and allocations.
155	Please specify what kind of notifications, what type is expected (i.e. email, push, SMS, etc.)?	Email is sufficient for these purposes, but we appreciate having a variety of options.
156	We read your response confirming there is no need for this tool to generate contracts. That said, after a contract is generated outside the system, is there a need for CLM (contract lifecycle management), negotiate/redline or just e-signature?	It is likely that we would need contract lifecycle management at some point as there are multiple steps with compliance, renewal process (if applicable), and more. An e-signature is already generated at contract execution using DocuSign.
157	Do service providers need the ability to self-register or will they be given access by an internal employee?	Currently, new providers are given access by an internal employee (Program Lead) after filling out a request form. Notably, we are conducting a business process improvement effort in preparation to onboard the new tech and this order of operations may change as a result.
158	Language requirements - Q&A #16 says that this will be needed but does not specify what languages. Can you elaborate?	DHS will collaborate with the Successful proposer to make resources for individuals with limited English proficiency or other communication resources available. The resources include languages like Spanish, American Sign Language, and more. This list is not exhaustive and may contain additional languages not mentioned.
159	Can the County provide a short 1–2-week extension to the due date for proposals, to allow for more thoughtful and complete responses to the RFP?	At this time, we're not able to offer an extension on the timeline.
160	Can offshore resources be used for development of the solution, if production and non-production environments that contain PII/PHI and other confidential information remain in the US and are not accessed by	Yes, this should not be an issue.

	offshore resources, and all data remains in the US?	
161	What is the budget range or NTE for this project? Has that budget amount been approved/allocated?	Please see the response to question #17.
162	Should integration with the external systems in Appendix B be included as part of this initial (6 month) timeline the RFP is asking for, or would they be part of a follow-on phase (or separate project) potentially?

If the answer to that is "included in first phase," then for each of the systems listed in Appendix B, can you advise if they are custom-built proprietary systems or other SaaS systems? | The preferred provider will be able to integrate with all key systems as part of the initial implementation. There are some integrations that can occur on a longer timeline, to be determined jointly with the solution provider. The key systems are custom-built in-house with the except of Oracle JDE and OnBase. |
163	Does your organization require a test environments/sandbox?	The Successful Proposer will be able to provide appropriate environments for both testing and training.
164	Do you have interest in an AI-driven solution? If so, what policies do you have in place for AI that we should be mindful of or address explicitly in a proposal?	We are open to creative ideas so long as they resolve key problems for us. However, we have security limitations and would not be willing to send data outside of our firewall for the purposes of model training or scoring.
165	Do you have a standardized list of the contract elements you consistently need to extract from documents or share across applications?	We are undergoing a process modernization effort right now, but we will have this list available before implementation begins.
166	What is the volume of existing contracts that would need to be migrated to the new contract management system?	Approximately 10,000.
167	Would you be open to a partial response for any section of the RFP where an AI solution could address some of the core challenges?	Please see the response to question #164.
168	How many other systems does the County expect to be integrated with this system? Can you provide details of integration methods of each of those systems i.e. Rest API using Azure Gateway, WebServices, File Based or any ETL tool?	The majority of the integrations will be implemented using RESTful APIs or Oracle connectors.
169	What is the desired go-live date for this system?	We're hoping to be entering new contracts into the solution by End of Year.

170	User Licensing – Of those users defined in the RFP: a) How many internal users will requi9re administrative level access? b) How many internal users will require the ability to add, edit and delete? c) How many internal users will require request only access? d) How many internal users will require read-only access?	Please see the response to question #152.
171	How many internal users do you project will require access to the system at any given time?	Please see the responses to questions #13, #152.
172	Data Integration: Can you please expand upon your preferences to integrate with Oracle Data Warehouse, Oracle Cloud, JD Edwards, IAM, OnBase Unity, and Action Tracker? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.	We do not have anything to expand on at this time. Please review the RFP and this Q&A document.
173	Are there any additional systems that may require a one-time data import such as a legacy Contract Management system? If so, please provide the system name, version, scope of use, the total number of contract records and files being imported into the system and SOAP/REST API, if available.	We need to migrate historical contracts from our internal storage, anticipating around 10,000 records. Additionally, we expect to handle between 5,000 to 15,000 associated documents.
174	What objects, fields, and tables will your organization be passing in the data integration between the Contract Management Solution and Oracle Data Warehouse, Oracle Cloud, JD Edwards, IAM, OnBase Unity, and Action Tracker?	More detail about the data schemas and models will be provided at implementation time.
175	Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?	The other systems to integrate with are either deployed in-house or in our Azure cloud environment, managed by us.

176	**Does Oracle Data Warehouse, Oracle Cloud, JD Edwards, IAM, OnBase Unity, and Action Tracker have one of the following available for integration and your organization has licensed access: SOAP API, REST API?**	We have developed custom in-house APIs and some of these are SOAP and RESTful. In other cases, the integration will be directly to Oracle Data Warehouse.
177	**Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements?**	We are in the midst of redesigning and modernizing our process for contract workflows. The basics are covered in the response to question #27.
178	**Public Sector Bids:** **Is your organization eligible to purchase off the GSA Schedule 70? If yes, would you like GSA pricing in the bid response or retail pricing?**	No, DHS Procurement does not currently utilize GSA Schedule 70.
179	**If in the event our response is subject to an Open Records Request, will we be notified and given the opportunity to provide a redacted response in accordance with applicable Freedom of Information laws?**	Yes.
180	**Does the awarded vendors staff have to be e-verified, run through OFAC sanction lists, and meet US working regulations?**	Any Successful Proposer must abide by the DHS standard contract requirements outlined in Section 6. Beyond this, any other requirements of the Contracted Service will be discussed and/or negotiated with the Successful Proposer as part of the final contract terms.
181	**In addition to the 12 pages allocated in the provided response form, can we include additional reference material and/or an appendix with details on our recommended product?**	No, not at this time. If during review, the Evaluation Committee would like to request additional information, we will reach out to gather it, then.