ADDENDUM NO. 1

Date: January 28, 2015

for

Contract Management System
SOCCCD - BID No. 321D

South Orange County Community College District

General-All project documents including contract documents, drawings, and specifications, shall remain unchanged with the exception of those elements added, revised, deleted, or clarified by this addendum.

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ITEMS:

1-1  Q & A

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Q1: Can you provide additional detail on the contract approval process? A visio or description of the different ways that the contract can be routed will be helpful.

A1: Different types of contracts would have different workflow approvals. Decisions may also depend on the various software capabilities. However, an ideal contract approval process is found in Attachment A. Note that the ideal payment method identified is not currently available and payments will be made using checks.

Q2: Please indicate at what points should the solution integrate with Workday? What type of integration should be included in the scope of work?

A2: There is no established third party contract integration currently developed for Workday.

A. An ultimate solution would: Provide the contract “author” with multiple template contracts to choose from as their baseline contract, i.e. consultant services, construction services, guest artists, etc. After selecting the baseline type, the author would have the option to request that certain of the terms and conditions be excluded from their version as non-applicable. (Note: Some terms and conditions would not come with the option of exclusion.) The author would also be required to fill in form boxes relative to scope of work, date, and value. All of this information would be integrated into the Workday supplier contract. This supplier contract would be routed through the approval process and upon approval would be forwarded to the service provider for acceptance and electronic signature. Once fully executed this supplier contract will act as the purchase order and may be invoiced against directly.

B. Though it is the least desirable of solutions, it is possible that at this time, there is no integration with Workday other than to add the contract to the Workday supplier contract as an attachment.
Q3: On page 12, the following statement: "The District requires that for all tasks, the Vendor assign a dedicated representative to work with the District and its project team through all phases of review, setup, planning, and training" - does this mean you would like our project team dedicated to their project 100% or just need the same consistent group of team members working the project?

A3: The District requires the same consistent group of team members working on our project. This group or individuals may be working on other projects at the same time as long as a high quality of responsiveness is maintained on the SOCCCD project.

Q4: Pg 5 of the RFP: Instead of ten (10) hard copies of the submission, will SOCCCD accept two (2) hard copies and eight (8) electronic copies on CD or flash drive in addition to the one electronic copy already stated?

A4: Revise the requirement for hardcopies as follows: one hard copy and one electronic copy. We shall take it from there.

Q5: Can SOCCCD confirm that http://www.socccd.edu is the “district’s bid website” address where addenda will be posted?

A5: Confirmed.

Q6: Can you confirm that electronic signatures are a part of the requested services provided with this proposal?

A6: Yes, however, if electronic signatures are part of the service you are providing, please describe the method employed for authenticating signatures.

Q7: What email client does SOCCCD use?

A7: SOCCCD uses Microsoft Exchange and Outlook is the standard email client. However, SOCCCD hosts locally for faculty and staff and uses Office 365 for students.
ATTACHMENT A

Ideal Contract Approval Process

Precursors
- Categorize types of contracts
- Clarify roles and responsibilities
- Reduce layers of approvals
- Implement a single source of data (new ERP)
- Pre-populate screens based on role
- Provide training on new process and new system

Originator
- Go to online "smart" form - answer questions
- Auto-navigate to appropriate template
- Complete template and upload docs - incl. contract start-date, terms, etc. - require key fields
- Auto-route for approval based on college and contract type

Reviewer
- Review, edit, approve (everyone using ERP)
- Auto-route to vendor
- Vendor signs electronically - e.g., DocuSign
- Auto-notify originator/owner if "contract approved"

Vendor
- District enters final approval
- Extract from Board if > $100K
- E-mail invoice to AP
- AP pays via ACH or credit card

Accounts Payable

Ideas:
- Vendors approaching $86K
- Auto-reminder 60 days prior to contract expiration
- Auto-review multi-year contracts

Definitions:
- If it's a service, it's a contract
- If it's a 1-time repair <$5000, it's not a contract
- If there are Terms and Conditions, it's a contract
- If it's an "agreement," it's a contract