Request for Proposal
Contract Management System
(RFP #321D)

South Orange County Community District
28000 Marguerite Parkway
Saddleback College Health Sciences Building, 3rd Floor
Mission Viejo, CA 92692

Responses Due: 2:00 PM, February 2, 2015
# Request for Proposal
## Contract Management System
### RFP #321D

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Introduction

The purpose of this document is to invite vendors to participate in the South Orange County Community District (District) procurement process for acquiring a Contract Management System. In particular, the goal is to solicit proposals for products and services that address the District’s needs. The District’s preference is for a Software as a Service (SaaS) solution.

Profile of the South Orange County Community District

South Orange County Community District encompasses 382 square miles in South Orange County serving over 909,000 residents in 26 communities. We know that higher education is directly linked to quality of life and economic vitality. We have helped generations of families achieve their educational and career goals since 1967.

This multi-campus district is comprised of Saddleback College in the City of Mission Viejo (1967), Irvine Valley College in the city of Irvine (1985) and Advanced Technology Education Park (2007) in the city of Tustin.

The District is governed by a seven-member elected Board of Trustees and the district’s chief executive officer is the Chancellor.

District Services provides centralized administrative services to our three campuses including: Chancellor and Trustee Services, Business Services, Technology and Learning Services, and Human Resources. These departments provide accounting, benefits, facilities planning, fiscal services, human resources, information technology, institutional research and planning, payroll, public affairs, purchasing, risk management, and warehouse/mailroom services to our district.

The district continually assesses the effectiveness of its services through district-wide surveys, shared governance committees and task forces that are established to accomplish specific projects. Strategic planning is an essential tool for guiding our direction and assuring compliance with accreditation standards.

The Intent of the District

The District is seeking vendor proposals for the procurement, implementation, and ongoing success of a Contract Management System that will also integrate into an electronic signature system. In addition, the District seeks professional services to assist in the implementation.

Procurement Process

This RFP and any resulting contract or awards shall be governed by the Section 81645 of the State of California Education Code. As such, the following shall apply:

“The governing board of any community college District may contract with a party who has submitted one of the three lowest responsible competitive proposals or competitive bids, for the acquisition, procurement, or maintenance of electronic data processing systems and equipment, electronic telecommunications equipment, supporting software, and related materials, goods, and services, in
accordance with procedures, and criteria established by the governing board.” The District’s procurement process will entail four major steps:

**Step One:**

Vendors will be invited to submit proposals in response to this RFP. Proposals must, at a minimum, meet the District’s mandatory requirements as listed in the “**Critical Criteria for Proposed Software**” section of this RFP and should focus on products and services that best satisfy the District’s needs, as presented in this RFP. No cost information is desired from vendors in Step One of the procurement process.

**Step Two:**

The District evaluation committee will evaluate vendors’ written responses with respect to the District’s needs and critical criteria, as presented in this RFP. Qualified vendors will be invited to continue in the procurement process.

**Step Three:**

Qualified vendors will be asked to perform product demonstrations. Such demonstrations will be based upon the District’s specific functional needs and requirements.

**Step Four:**

After a thorough evaluation of vendors’ proposals and onsite demonstrations, the District will solicit proposed pricing from qualified vendors. Furthermore, the District may ask qualified vendors to refine their proposals for various products and services. At the conclusion of such a process, the District anticipates they will make a final recommendation to the District’s Governing Board to authorize a contract.

**RFP Instructions and Requirements**

Below are instructions and requirements for all vendors. The District will not consider a vendor’s proposal unless it is consistent with all material instructions and requirements.

- **The District has engaged the services of Strata Information Group (SIG) to assist in this procurement process. All vendors shall consider Henry Eimstad or Harold George of SIG as sole point of contact for all communication throughout the entire evaluation process. Henry or Harold can be reached at:**

  ```
  Henry Eimstad  
  Partner  
  Strata Information Group  
  3935 Harney St, Suite 203  
  San Diego, CA 92110  
  619-719-2483 - Cell  
  eimstad@sigcorp.com - Email
  
  Harold George  
  General Manager, Professional Services  
  Strata Information Group  
  3935 Harney St, Suite 203  
  San Diego, CA 92110  
  210-364-1349 - Cell  
  george@sigcorp.com - Email
  ```
PROPOSAL INFORMATION:

Submittal Deadline:  **2:00 PM, Monday, February 2, 2015**

Place of Bid Receipt:  SOCCCD – Facilities Planning and Purchasing Department
Saddleback College
Third Floor, Heath Sciences Building
28000 Marguerite Parkway
Mission Viejo, CA 92692-3635

Mailing Address:  South Orange County Community College District
Attn: Brandye D’Lena
Executive Director of Facilities Planning and Purchasing
28000 Marguerite Parkway
Mission Viejo, CA 92692-3635

Proposals will be received up to the above-indicated time and date. Late proposals will not be accepted and will be returned unopened. Proposals may be delivered in person, by U.S. mail, or courier services. Fax proposals are not acceptable. Proposals must be submitted in an envelope plainly marked with the following information: Contract Management System (SOCCCD RFP #321D)

Proposals shall be binding upon the provider for 180 calendar days following the award recommendation date. All terms and specifications included in or appended to this solicitation apply to any subsequent award.

Number of Copies: Submit ten (10) copies of the proposal. An electronic copy in MS-Word and PDF formats on a flash drive must also be provided. Brochures and other promotional materials are not necessary unless you consider them to be the only way to convey your services.

- Each proposal shall conform to the format presented in Appendix A. Proposals shall include tabs at each identified section and all information shall be presented in the order that is identified in Appendix A.

- Each proposal shall include a Non Collusion Declaration signed by the vendor with his/her usual longhand signature. Proposals by partnerships must include the names of all partners and be signed in the partnership name by a general partner with the authority to bind the partnership in all relevant matters. Proposals by corporations must include the legal name of the corporation followed by the signature of a person who is authorized to bind the corporation. The name of each signatory shall be typed or printed below the signature. When requested by the District, satisfactory evidence of the authority of all those who signed the proposal shall be furnished.

- Proposals may be withdrawn by a vendor prior to February 2, 2015, by submitting a written request to the District. Thereafter, a vendor shall not be relieved of the proposal submitted without the District’s consent or vendor’s recourse to Public Contract Code 5100 et seq.

- All addenda issued prior to February 2, 2015, shall form a part of the specifications issued to vendors for the preparation of their proposals and will be made available on the district’s bid website.

- The District reserves the right to reject any or all proposals, or any portion or combination thereof. In addition, the District reserves the right to waive any irregularity or informality within the proposal or procurement process.

- Section 508 Compliance statement: Vendors bidding on this proposal must be willing to accept the following statement as part of any agreements that may be entered into with the District’s: "Vendor hereby warrants that the products or services to be provided under this agreement comply with the accessibility requirements of section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794d), and its implementing regulations set forth at Title 36, Code of Federal Regulations, part 1194. Vendor agrees to promptly respond to and resolve any complaint regarding accessibility of its
products or services, which is brought to its attention. Vendor further agrees to indemnify and hold harmless the South Orange County Community College District, the Chancellor’s Office of the California Community Districts, and any California community District using the vendor’s products or services from any claim rising out of its failure to comply with the aforesaid requirements. Failure to comply with these requirements shall constitute a breach and be grounds for termination of this agreement.”

- The award of a contract to a qualified vendor, if made by the District, will be based upon a comprehensive review and analysis of each proposal. The District shall be the sole judge of the merits of proposed products and services. The District, alone, shall determine its best interests and act accordingly. All vendors shall abide by the decisions of the District.

- Upon the District’s request, a vendor shall submit satisfactory documentation of its financial resources, experience in providing relevant products/services, personnel who are available to perform with respect to the proposed contract and any other desired evidence of the vendor’s qualifications.

- Vendors are entirely responsible for any expenses that are associated with their participation in the procurement process. The District shall have no responsibility.

- The District reserves the right to perform whatever research it deems appropriate in order to assess the merits of any vendor’s proposal. Such research may include, but not necessarily be limited to, discussions with outside consultants, interviews with the vendor’s existing clients and analysis of industry reports.

- The District reserves the right to seek clarifications and follow up information from vendors.

- Vendors are hereby advised that the District is bound by open records laws and policies when it receives vendor-submitted materials. Any information that constitutes a trade secret and that a vendor wishes to declare confidential should not be included in the RFP response.

- In the event of litigation, the related matters shall be governed by and construed in accordance with the law of the State of California. The venue shall be with the appropriate state or federal court located in Orange County, California.

- The vendor selected by the District will be required to execute a formal contractual agreement based upon the terms and conditions included in this RFP. A draft contract may be provided as consideration in the development of the Agreement. All contract documents are subject to the approval of the District and its legal counsel. Electronic approval of terms and conditions upon sign-in will not be binding. All contract amendments must be fully executed between those identified as signatory by each party.

- Each vendor and subcontractor, if any, must possess all appropriate and required licenses or other permits to perform the work as identified in the contract documents. Upon request, each vendor shall furnish the District with evidence demonstrating possession of required licenses and/or permits.

- The vendor shall not discriminate against any prospective or active employee engaged to perform any work because of race, color, ancestry, national origin, religious creed, sex, age, disability or marital status. The vendor agrees to comply with applicable federal and State laws including, but not limited to, the California Fair Employment and Housing Act, beginning with Government Code Section 12900, and Labor Code Section 1735. In addition, the vendor agrees to require compliance with this provision by any subcontractor.

- No interest in the contract shall be transferred to any other party without the permission of the District’s Governing Board.

- Any award that arises out of the procurement process shall be governed by the laws of the State of California.
• The vendor agrees to indemnify and hold harmless the District from any claim that arises out of its failure to comply with the Rehabilitation Act of 1973, as amended.

• In accordance with the provisions of Section 3700 of the Labor Code, the successful vendor shall secure the payment of compensation to its employees. The vendor hereby acknowledges, and by submitting a proposal agrees, to the following statement:

  "I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for worker's compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract documents."

• Insurance: Vendor shall not commence work until it has obtained the insurance required herein and has submitted proof of such coverage to the District. Vendor shall not allow any subcontractor, agent, or employee to commence work on the contract without proof of same. Coverage must be secured and maintained for the duration of the contract.

  (a) Workers’ Compensation Insurance not less than the statutory limits and including employer’s liability coverage limits not less than $1,000,000.
  (b) Comprehensive Commercial General Liability Insurance with limits not less than $1,000,000 per occurrence.
  (c) Comprehensive Automobile Liability Insurance with limits not less than $1,000,000 per occurrence for all owned, non-owned and hired vehicles.

  The insurance certificates for (b) and (c) must list the District as additional insured, as follows: South Orange County Community College District, its Board of Trustees, officers, agents, representatives, employees, and volunteers are added as additional insured. The certificate must include a copy of the additional insured endorsement that amends the insurance policy.

• The District does not discriminate with regard to race, color, gender, national origin, or disability in the awarding of contracts.

• The District encourages the submission of proposals from all vendors who can meet the mandatory requirements set forth in this RFP.
Existing Applications and Information Technology at SOCCCD

General Background

SOCCCD supports a portfolio of administrative applications that provide services district-wide to students, faculty, and staff. This portfolio includes a complete Student Information System, Human Resources system, Financial system, Financial Aid system, Library automation system, Learning Management System, and Enterprise Content Management System. In order to simplify management of the systems and minimize expense, SOCCCD IT has standardized on a Windows Server and SQL Server environment with web client access whenever possible.

Web Systems Information

Many systems at SOCCCD provide services through a web browser. Most SIS functionality is delivered through MySite, a web-based portal for students, faculty, and staff. HCM is completely web-based. PowerFaids has a student-facing web portal. The Sirsi library system has a web portal for patrons. ImageNow provides web clients in addition to full Windows clients. The Blackboard LMS is completely web-based.

Current Application Software Supported

<table>
<thead>
<tr>
<th>Systems Name</th>
<th>Source</th>
<th>Areas Directly Supported</th>
<th>Functional Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Information System (SIS)</td>
<td>Locally developed</td>
<td>Students, faculty, staff</td>
<td>Comprehensive software application which automates many functions in Student Services and Instruction at the colleges. Services are provided to students, faculty, and staff through a common portal.</td>
</tr>
<tr>
<td>Finance (FDM) (being implemented)</td>
<td>Workday</td>
<td>Purchasing (central Purchasing and all offices/departments), Business Services</td>
<td>Software in support of purchasing and accounting</td>
</tr>
<tr>
<td>HR/Payroll (HCM) (being implemented)</td>
<td>Workday</td>
<td>HR, Payroll Business Services, College fiscal offices</td>
<td>Software in support of HR functions, budget development, and local payroll processes</td>
</tr>
<tr>
<td>PowerFaids</td>
<td>College Board</td>
<td>Financial Aid offices</td>
<td>Financial Aid software used to automate all aspects of the college financial aid offices</td>
</tr>
<tr>
<td>Sirsi Unicorn</td>
<td>SirsiDynix</td>
<td>Library staff and students</td>
<td>Library automation system supporting all library functions</td>
</tr>
<tr>
<td>ImageNow</td>
<td>Perceptive Software</td>
<td>Financial Aid offices, Admissions and Records offices, student services, instruction</td>
<td>Enterprise-wide document management and workflow system</td>
</tr>
<tr>
<td>Blackboard LMS</td>
<td>Blackboard</td>
<td>Students, faculty</td>
<td>Learning management system for students</td>
</tr>
<tr>
<td>PeopleAdmin</td>
<td>PeopleAdmin</td>
<td>Applicant Tracking, Position Description, Performance Management</td>
<td>Comprehensive Software as a Service for managing all Employment Applications and associated Position Descriptions and for managing performance evaluations for Administrators and Managers.</td>
</tr>
<tr>
<td>Systems Name</td>
<td>Source</td>
<td>Areas Directly Supported</td>
<td>Functional Description</td>
</tr>
<tr>
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<td>------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Raiser’s Edge</td>
<td>Blackbaud</td>
<td>College Foundation Offices</td>
<td>Fundraising Management solution for nonprofits which includes a database of donor and contribution records. It also includes modules for Alumni Tracking and Events Management.</td>
</tr>
<tr>
<td>FUSION</td>
<td>Foundation for California Community Colleges</td>
<td>Space Inventory Management, Facilities Assessments, Enrollment Forecasting, Facilities Planning and Project Fiscal Management</td>
<td>A web based suite to support the integrated management and reporting on California Community College facilities throughout the state.</td>
</tr>
<tr>
<td>SharePoint</td>
<td>Microsoft</td>
<td>Faculty and Staff</td>
<td>A general purpose collaboration solution for information sharing and communication</td>
</tr>
<tr>
<td>inForm Data Warehouse</td>
<td>Based on Microsoft Business intelligence stack</td>
<td>College and District Researchers, administrators, faculty and staff</td>
<td>A general purpose data warehouse containing student, staff, and financial data, along with research tools and reports. Also used for state reporting.</td>
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**Important Facts**

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<tr>
<td>Number of Full-Time Faculty</td>
<td>350</td>
</tr>
<tr>
<td>Number of Part-Time Faculty</td>
<td>1,047</td>
</tr>
<tr>
<td>Number of Academic Administrators and Classified Administrators/Managers</td>
<td>109</td>
</tr>
<tr>
<td>Number of Regular Classified FT and PT Employees</td>
<td>538</td>
</tr>
<tr>
<td>Number of Short-term Temporary Classified Employees</td>
<td>879</td>
</tr>
<tr>
<td>Major Sites</td>
<td>South Orange County Community College District</td>
</tr>
<tr>
<td></td>
<td>Saddleback College, Mission Viejo, CA</td>
</tr>
<tr>
<td></td>
<td>Irvine Valley College, Irvine, CA</td>
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<tr>
<td></td>
<td>Advanced Technology and Education Park (ATEP), Tustin, CA</td>
</tr>
<tr>
<td>Accreditation</td>
<td>Western Association of Schools and Colleges (WASC)</td>
</tr>
<tr>
<td>Fall 2011 Enrollment (Headcount)(FTES)</td>
<td>42,151 Headcount</td>
</tr>
<tr>
<td>FY 2012–2013 Unrestricted General Fund Budget</td>
<td>$201 million</td>
</tr>
</tbody>
</table>
Dates and Timeframes*

*All Dates are subject to change at the discretion of the District*

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Timeframe</th>
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<tbody>
<tr>
<td>Release of RFP</td>
<td>January 16, 2015</td>
</tr>
<tr>
<td>Deadline for vendors’ questions to District</td>
<td>January 26, 2015</td>
</tr>
<tr>
<td>Deadline for District to respond to vendor questions</td>
<td>January 28, 2015</td>
</tr>
<tr>
<td>Deadline for vendors’ submission of proposals</td>
<td>February 2, 2015</td>
</tr>
<tr>
<td>Selection of vendors who will be invited to give onsite demonstrations</td>
<td>February 12, 2015</td>
</tr>
<tr>
<td>On-site vendor demonstrations and presentations</td>
<td>TBD</td>
</tr>
<tr>
<td>Request for Pricing Proposals issued</td>
<td>TBD</td>
</tr>
<tr>
<td>Pricing Proposals Due</td>
<td>TBD</td>
</tr>
<tr>
<td>Finalization of contract terms and pricing</td>
<td>TBD</td>
</tr>
<tr>
<td>Approval of contract award by the District’s Board</td>
<td>TBD</td>
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</table>

All questions should be submitted to Harold George of SIG, george@sigcorp.com – Email, in writing by the deadline indicated above. Written answers to questions will be distributed to all vendors on or before January 26, 2015.

Vendors are strongly encouraged to schedule their resources according to the above dates and timeframes.
Critical Criteria for Proposed Software

Description of the District’s current contract development environment

Currently, the District’s contract templates are stored on SharePoint in either Word or PDF format. At the most basic level, users at each of the three colleges or the District office download the contract, enter information such as vendor name, contract term, a scope of work description, and contract amount. At the colleges, contracts are reviewed by the college business office or other parties, approved by appropriate college officials, and sent to District office, typically via email, for review and approval. Once executed, contracts are forwarded to the vendor, stored on the District server, and attached as an image to the District’s electronic Purchase Order. The District does not have any reporting, version control, standard file naming conventions, or standard storage locations for its contract. The District is implementing Workday HCM and FDM, and will have some capabilities through system workflow to perform final approval and cumbersome against approved contract. For the most part, the District and the Colleges use standard contract templates. Standard terms and conditions typically don’t change between templates and minimal negotiation occurs with vendors. However, the District does use some contracts, long-term facilities use agreements or other vendor supplied contracts, for instance, where contract specifics may be negotiated with a vendor, revised to meet district requirements and/or go through district and/legal review and refinement. When a contract is in negotiations, multiple parties such as the vendor, vendor’s legal counsel, the District, and District’s legal counsel, as well as the initiating department might enter or edit contract data. Microsoft Word change-tracking is used to track activity. This can be a lengthy process. Dealing with various versions and persons providing input gets complicated, time-consuming, and confusing. The District desires to make this versioning process more user-friendly, efficient, and to significantly reduce processing time to achieve the final product.

Description of the District’s requirements for a new Contract Management System

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

- The creation, modification, secure storage, and electronic workflow/approval routing of contracts
- Detailed and executive-level customizable reporting for contract expiration, contract value, and contract type
- The ability to update/upload contract templates in a variety of common file formats
- The ability to apply electronic signatures either in parallel or sequence
- Ability to search text within contracts
- Document version control and the ability to compare versions and originators
- The ability to route a contract outside of the District to vendors or legal counsel for the purpose of review, editing, negotiation, and finalizing the document
- The ability to store and link to a contract other related documents such as certificates of insurance, bonds, scope of work, and/or other necessary exhibits
- The ability to generate email notifications and reminders regarding contract status
- The assignment of a dedicated account representative
- Customer support during SOCCCD business hours for technical difficulties
- Ability to manage other documents that may require multiple-party review, editing, and approvals
- The ability to store a library of standard contract clauses that can be inserted into a contract as needed is a plus
- The ability to be integrated into Workday would be a plus.
- Sample training materials need to be provided by Vendor for District review.
- Proactively notify on contract expiration based on type of contract
- Allow for role-based security and task assignments
Scope of Work

The scope of work for this project consists of the following primary tasks. 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.

- **Review of District Business Model.** The planning phase will include a Vendor review, in consultation with the District’s project team, of the District’s current contracts business processes and make recommendations to the District as to modifications to its processes based on best practices and software functionality, including recommendation on which components of the software would be utilized in Vendor’s software versus Workday. The goal is to ensure there are no gaps in contracts management process between the two products, Vendor’s product and Workday.

- **Initial System Setup.** In consultation with the District’s project team, the Vendor will work with the District to complete the initial setup of the system.

- **Planning/Implementation.** The District expects that implementation will consist of an initial pilot implementation and a subsequent phased rollout of the system throughout the District’s two colleges and District services locations. In consultation with the District project team, the Vendor will develop a pilot implementation plan and the first phase of a district-wide phased rollout. The District expects that the Vendor will provide a dedicated representative to work directly with the District during the pilot and initial implementation.

  The pilot implementation will include an additional review of the system setup should it be necessary to fine-tune the initial setup as described in ”Initial System Setup” above.

- **Training.** The implementation phase will include Vendor-provided, face-to-face training for contract management system administrators and pilot program participants. The Vendor will also propose an additional training strategy including either face-to-face training or Web-based training for additional users during the first phase of the District-wide rollout. On line training webinars are desirable for ongoing training.

- **Implementation.** Timeline should be provided by Vendor.

Supplementary Questions

The following questions are important with respect to the evaluation of proposals. Vendors should provide clear and detailed responses to each item.

1. Please provide detailed information about reference sites. We are specifically interested in your most recent implementations. Please include the following:
   a. Names of institutions
   b. Contact names, titles, telephone numbers, and email addresses
   c. List of installed software products and the production status of each, when they were implemented and which release.

2. Please organize the information about reference sites with respect to the following categories:
   a. California State and Private Universities
   b. California Community College District(s)
   c. Community college districts with multiple colleges
   d. State and Private Universities and Colleges

3. Please describe how your solution meets Section 508 accessibility requirements.

4. Please describe all available report writers, query tools, and other ancillary software.

5. Please describe any online training materials that the District should consider.

6. SOCCCD anticipates that this system may be integrated with Workday. Please describe your approach to Workday integration.

7. Please describe your SaaS environment. Is it “Single or Multi” tenant?
Appendix A: Required Format for RFP Response

<table>
<thead>
<tr>
<th>Section 1: Executive Summary</th>
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<tbody>
<tr>
<td>Provide an executive summary that summarizes the proposal.</td>
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<thead>
<tr>
<th>Section 2: Vendor Profile</th>
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<tbody>
<tr>
<td>Provide the following information:</td>
</tr>
<tr>
<td>(a) Name of vendor</td>
</tr>
<tr>
<td>(b) Vendor’s mailing address, telephone number, FAX number, and web site address</td>
</tr>
<tr>
<td>(c) Vendor’s primary contact person</td>
</tr>
<tr>
<td>(d) Primary contact person’s title, mailing address, telephone number(s), FAX number, and email address</td>
</tr>
<tr>
<td>(e) Brief overview of the vendor’s company, products and services</td>
</tr>
<tr>
<td>(f) Identify proposed staff and provide resume’s</td>
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<thead>
<tr>
<th>Section 3: Vendor’s Understanding of the RFP</th>
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<tbody>
<tr>
<td>(a) Provide a statement that acknowledges the vendor’s understanding of the “Procurement Process” as presented in the RFP.</td>
</tr>
<tr>
<td>(b) Provide a statement that acknowledges the vendor’s understanding of the “RFP Instructions and Requirements” as presented in the RFP.</td>
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<tr>
<th>Section 4: Critical Criteria for Proposed Software</th>
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<tr>
<td>Provide responses to each of the items within the “Critical Criteria for Proposed Software” section of the RFP.</td>
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<tr>
<th>Section 5: Proposed Software Products</th>
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<tr>
<td>Identify all application software that is proposed or required.</td>
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<tr>
<th>Section 6: Supplementary Questions</th>
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</thead>
<tbody>
<tr>
<td>Provide a response to each of the items within the “Supplementary Questions” section of the RFP.</td>
</tr>
</tbody>
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<thead>
<tr>
<th>Section 7: Proposed Training and Implementation Services</th>
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</thead>
<tbody>
<tr>
<td>(a) Describe the training and implementation support that is required, recommended, available or provided for each proposed software product, including the database management system.</td>
</tr>
<tr>
<td>(b) Provide a suggested implementation schedule, including major milestones.</td>
</tr>
<tr>
<td>(c) Estimate the number of hours of vendor-provided professional services that are needed.</td>
</tr>
<tr>
<td>(d) Describe all additional services (e.g., remote technical support) that are required, recommended, and available or provided for each proposed product.</td>
</tr>
<tr>
<td>(e) Provide information about national-, regional-, and state-specific Users Groups that are supported by your company. Include contact information for Officers of those Users Groups.</td>
</tr>
</tbody>
</table>
**Section 8: Data Conversion and System Interfaces**

(a) Describe the products, utilities, processes and services that are recommended or needed for the conversion or loading of the District’s existing data.

(b) Identify a means of developing and maintaining interfaces between this system and Workday and the District’s future enterprise systems during the implementation process.

**Section 9: Software Maintenance and Enhancements**

(a) Describe the benefits, impacts, and schedules of new releases and modules. State the circumstances under which such releases are mandatory or optional.

(b) Describe, both during and after the warranty period, the procedures for obtaining product support.

(c) Explain how custom modifications can be made by the vendor and/or District. In addition, describe the alternative mechanisms for maintaining such modifications over time.

**Section 10: Vendor’s Corporate Strength**

Describe the vendor’s corporate history, market segment(s), client base, employee base, research and development programs and financial well-being.

**Section 11: Optional Products and Services**

Describe, in detail, all optional products and services. Vendors are hereby advised that the District’s may want to procure an optional item, but might not be able to do so if it is not formally declared in this section. Optional products might include query tools, workflow systems, IVR solutions, utilities, documentation, training materials, data warehouses, database technologies, security mechanisms, etc.

**Section 12: Additional Information**

Provide any additional information that the District should consider in its evaluation of proposals. This would include a list of whether your company is currently involved in litigation with any of your clients. Do not provide marketing brochures or generic information that does not meet your specific solution to this Request for Proposal.

**Section 13: Acknowledgement of Addenda**

Provide attached proposal form that acknowledges understanding and compliance with RFP conditions and acknowledges the issuance and receipt of any RFP addenda, if applicable.

**Section 14: Client References**

Provide three client references for agencies/companies that are currently or in the past five years have used your services. Community Colleges are preferred. A correlation between the proposed systems and the referenced system is preferred.

For each client include:

Owner/Company/Agency Name:

Contact Person No. 1 and current telephone number: Business Services Executive

Contact Person No. 2 and current telephone number: IT Executive
### Section 15: Contact Information Page

<table>
<thead>
<tr>
<th>Category</th>
<th>Name</th>
<th>Title</th>
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</thead>
<tbody>
<tr>
<td>Individual</td>
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<td>Partnership</td>
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<tr>
<td>Corporation</td>
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</tbody>
</table>

**Partner Name:** ___________________________________
**Name of Signatory:** ___________________________________
**Title:** ___________________________________

**Individual**
Name: ___________________________________
Title: ___________________________________

**Partnership**
Name: ___________________________________
Name of Signatory: _________________________
Title: ___________________________________

**Corporation**
Name: ___________________________________
(a __________ Corporation)
President: _________________________________
Secretary: _________________________________

[Seal]
The prospective Vendor must sign the Affidavit and provide the information required of Vendor as outlined.

NON-COLLUSION DECLARATION

I hereby swear (or affirm) under the penalty of perjury:

1. That I am the Vendor; a partner, an officer or an employee of the responding company/corporation having authority to sign on its behalf;

2. That the attached proposal or proposals have been arrived at by the Vendor independently, and have been submitted without collusion and without any agreement, understanding, or planned common course of action with any other Vendor or materials, supplies, equipment or services described in the Request for Proposal designed to limit independent offers or competition;

3. That I have fully informed myself regarding the accuracy of the statements made in the affidavit.

Declared this

[Signature]

Firm Name

Date
Request for Proposal
SOCCCD Number 321D

Contract Management System
Software as a Service (SaaS)

PROPOSAL FORM

Director of Facilities Planning and Purchasing
South Orange County Community College District
28000 Marguerite Parkway
Mission Viejo, CA 92629-3635

In compliance with this Request for Proposal, the undersigned acknowledges that I have read and understand all the conditions imposed herein and have received Addenda numbers ______________ and agree to furnish the services in accordance with the attached proposal or as mutually agreed upon by subsequent negotiation.

Name of Firm: ________________________________

Address: ____________________________________

City: ________________________________________

State & Zip: _________________________________

Telephone: _________________________________

Name: ______________________________________

Signature: __________________________________

Title: ______________________________________

Date: _______________________________________