Las Virgenes Municipal Water District
Request for Proposals: Electronic Document Management System
Addendum #1: Responses to RFP Questions
Issued August 20, 2024

This addendum is issued to modify the previously issued Request for Proposals (RFP) documents and/or given
for informational purposes and is hereby made a part of the RFP documents.

Responses to Questions are in *Italics.*

1. Will the District consider video conferences as an alternative to onsite meetings for Phase 1 of the RFP for consulting services for an electronic document management system?
   - *Yes, the District will consider video conferences for this phase.*

2. Are there any restrictions that would prevent a Canadian company from bidding?
   - *There are no restrictions that would prevent a Canadian company from bidding on the project provided the company is licensed to do business in the State of California.*

3. Mandatory requirement "*The firm is licensed to practice in California*". Can you specify exactly which license this would be, where to get it, cost of such license, and how long it takes to get a license?
   - *The firm must meet all necessary requirements to do business in the State of California including, but not limited to, obtaining any necessary local business licenses, complying with California Secretary of State requirements, and California Franchise tax Board requirements.*

4. Does a proponent have to have such a license to bid?
   - *Yes, the firm must be legally able to conduct business in the State of California at the time of the bid submittal.*

5. If a proponent does not have such a license, but wins the proposal, is it acceptable for the winning proponent to obtain the license after winning?
   - *See response to question 4 above*

6. Are there any minimum requirements for on-site visits, or is it acceptable for all work to be conducted remotely, with no on-site visits?
   - *Onsite visits are not mandatory provided the deliverables from the project are achieved.*

7. How many employees are at LVWD?
   - *About 120 FTEs*

8. Will you make the existing out-of-date retention schedule available prior to bid submission?
   - *The District is currently in the process of updating its records retention policy and schedule. This may not be necessary for this phase of the District's EDMS Implementation.*

9. Our software employs a named user licensing model tied to two main types of users: Full Users and Participant Users. Full User can be granted ability to do anything within the repository including administering the system, importing document, and editing metadata. Participant Users are read-only users who can also participate (submit/approve) in forms processes. Do you know the number of users between these two licenses? Or would you like us to submit general pricing tiers only?

   - *Software specifications and functionalities do not form part of the deliverables of this phase of the District's EDMS Implementation journey.*

10. Is Las Virgenes Municipal Water District's preference more towards Cloud based Document Management System or On-Premises Document Management System?

    - *Any system that meets the desired deliverables, which will be the outcome of the chosen firm's efforts in this project, will be welcomed by the District.*

11. Do you have budget already available for this project? If yes, what is the maximum budget you are planning to spend on this project?

    - *The District has allocated enough funds to achieve the goals stated in the RFP.*

12. Have Las Virgenes Municipal Water District seen demonstrations of any Document Management System? If yes, what is the name of the solution and vendor which provided the demonstration?

    - *No, the District has not yet seen demonstrations of any EDMS products.*

13. Is there any expected timeframe within which you would like this system to go-live?

    - *The go-live date of the system will depend on the outcome of this phase of the project.*

14. Can you please provide us a pricing format to enable us to give you pricing as per your requirement? or shall we prepare it ourselves?

    - *Please, see RFP Page 7 on "Submission of Proposals" item 9.*

15. **The firm is licensed to practice in California**. Can the selected consultant obtain a business license to practice in California within 30 days of the contract award? This is what we typically see in government request for proposals. Otherwise, a consultant proposing from out of state must obtain a license before obtaining any work. This can be expensive and costly if not selected and discourages consultants from out of state from bidding on a project. We specialize in the work requested.

    - *No. The selected entity must be licensed to practice in California before the contract is awarded.*

16. Is it the District's intent for both Phases 1 and 2 to be completed within six months?

    - *It is the intent of the District to complete both Phases within six months. However, the District is flexible to project schedule adjustments based on discussions with the selected entity.*

17. **Scope of Documents**: Does the scope of this project include engineering and design documents?

    - *This is a districtwide initiative that will include documents related to engineering and design.*

18. **Requirements Documentation:** Could you clarify what specifically you want in terms of requirements documentation? Do you need both functional and technical requirements anticipated for the EDMS?

    - *Yes, the expected outcomes of this engagement should include both functional and technical requirements that will be part of a published Request for Proposals to implement the EDMS.*

19. **Records Management Engagement Deliverables:** What are the expected outcomes of the parallel Records Retention Consulting Services project that we can align with and leverage? For example, do we need to staff a records management resource on the EDMS engagement to interpret and create specific requirements for addressing records management, or will this already be complete?

    - *The expectation is for the EDMS to align with the District's Records Retention policies and standards. Relevant documents from the parallel initiative will be shared with the selected firm on this RFP.*

20. **Decision and Start Timeline:** What are the expected timelines for the RFP decision and the commencement of the project?

    - *The District would like to make an award decision within two weeks of receiving the proposals.*

21. **Retention Schedule:** When is the retention schedule development project anticipated to be completed?

    - *The District anticipates taking about six months to complete the Retention Schedule.*

22. **Process Maps:**

    - Are process flow maps expected as one of the deliverables for this project?

        o *The district expects process flow maps to be developed and delivered as part of the scope.*

    - Are there any existing process flow maps available for reference?

        o *There are no existing process flow maps.*

23. **Document Ingestion Process:** What is the anticipated process for ingesting electronic images into the new system? Will this be managed internally or outsourced?

    - *The District may elect to have a hybrid approach wherein a portion of the ingestion of electronic images into the new system is outsourced while some will be done internally.*

24. **Technical Specifications**

   o **Document Statistics**: Do you have any statistics or data on the sizes of documents stored within various departments?

      • *That information is not available currently.*

   o **Support Access**: Will the consulting team have access to application support, infrastructure, and security within the Information Systems business unit?

      • *The selected Consultant will work with the District's Information Systems team for access to any materials deemed necessary to accomplish the goals of this project.*

25. **Pricing and Bidding**

   Bidding Format:
      o Will Las Virgenes Water District accept a fixed-bid project-based response for each piece of work within each phase? An hourly rate for each resource would be included in our response. Or does the RFP mandate an hourly rate-based response with projected hours for each piece of work or deliverable?

         • *A fixed price for each phase is welcomed. Yes, please, also include the hourly rate for each resource.*

26. **Project Management Pricing:**

   For the project management component in Phase 2, is a price range acceptable in the RFP response, considering that the final system decision and implemented software capabilities could impact the scope of project management?

   • *Please, provide a not-to-exceed pricing for the Project Management Phase.*

27. Is LVMWD expecting the winning consultancy to manage the EDMS implementation while the system vendor does the actual implementation?

   • *The District expects the winning consultant to serve the role of the District's Project Manager and liaise with the EDMS provider to implement the system/platform. The District's Information Systems Division will be available to the PM as a resource during implementation.*

28. Under phase #2 deliverables can you briefly describe what LVMWD's expectations are for "EDMS in Production"?

   - *The District is looking to streamline its Document Storage and Retrieval processes. This should include: Document Access permissions; indexing for ease of access and retrieval; and integration with other District enterprise systems (ERP, CIS, CMMS, etc). Document purging and application of the adopted Retention Schedule and processes will also be important. The District hopes to further develop these requirements as part of Phase 1 of the current RFP.*