

Questions:

1. What made you want to look for a contract management solution? Was there a significant event that sparked the need for a contract management? -
 - a. Our current system contract is expiring and posting a re-bid to see what other offerings are available.
2. What are the top pain point(s) you are looking to solve?
 - a. Automated input of labor categories, contract clauses and details like OCR type approach.
 - b. Logos and company names applied directly. Would apply a company's info to a template and that company and logo be populated on subcontract. We have to do a lot of editing on subcontract templates today.
 - c. For non rev contracts and non expense contracts - NDA, team agreements the pain point is not having ability to upload those and generate a report to use year to year. We want a CM module where we can do a standalone document that isn't linked to something else in the system. Like a repository. We would like track the full lifecycle from NDA, TA and proposal which will then link to the revenue and subcontract contracts.
 - d. Need a tool that can store non rev agreements and commercial agreements.
 - e. We lack in the ability to develop reports and pull reports and we are disjointed in that. We do a lot of manual pulling, the data is there but we can't get it out of there.
3. What CRM are you using?
 - a. We would like to keep that confidential.
4. How many CRM users does Cherokee National have?
 - a. 25-30. PMs don't have licenses, approx. 80-100 range.
5. What is your timeline for this project?
 - a. Full implementation by Dec 15 2017 or would like to be fully implemented before.
6. Do you have budget for an application(s) like this?
 - a. Yes we do but do not wish to disclose.
7. How many users will require access to the system?
 - i. 25-30
 - b. How many will be updating records?
 - i. 25-30
 - c. How many will be only creating records or viewing data?
 - i. 25-30
 - d. How are all the requirements requested in this solicitation being managed today? In what systems? - Manual entry
8. Regarding "Does the solution have the options to select a company logo from a menu when creating a contract or other legal document from a template?", will the logo change with each contract or is CNB asking if a logo can be used for branding the system and having it in the contract templates?
 - a. CNB has multiple Orgs (business units) within Costpoint. We want all logos in the system and as few templates as possible. And swap out logo.
9. Regarding "Does the solution link financial requisitions and the associated subcontracts?" are the financial requisitions going to be entered in the Contract Management System or are they in another system?

- a. Reqs in Costpoint. But, yes we want to link reqs with financial requisitions.
- 10. Regarding "Does the solution provide prime and subcontract obligation tracking management?", can you please expand on this question? Is "obligation" a Contract or Sub-Contract?
 - a. Is it rev or expense, we want to track both. When data links with our financial system would like it in real time? Need to see what's obligated and left on ceiling. Needs to be linked to financial system so we can see what's there.
- 11. Could you provide samples of current DCAA ICE (Incurred Cost Electronically) Model reports used?
 - a. Refer to DCAA.
- 12. Regarding "Does the solution have auto-generation of contract briefs?", could you please explain what is meant by "briefs"?
 - a. A Brief to us is a summary of the contract.
- 13. Could you please provide details on the nature of integration with Deltek Costpoint, Salesforce, PeopleSoft, DocuSign, and AgilePoint? What information is being transferred, retrieved, or imported?
 - a. Want integration built in or, the system has fully capable API's or web services.
- 14. Is there any business requirement analysis document that CNB can share?
 - a. No, please refer to RFP.
- 15. Which contract software solutions that CNB has evaluated so far?
 - a. No formal evaluation has been done so far.
- 16. Can the submission deadline be extended by one week?
 - a. It is extended to March 22nd.
- 17. Will the evaluation criteria be published?
 - a. No.
- 18. How many users?
 - a. 25-30 plus 80-100 PMs
- 19. How many contracts do you do in a year and how many are existing in the repository
 - a. The active log for Revenue is approx. 800-1200 in a year. Includes modifications.
 - b. Subcontract/Expense Contracts approx. 1250 (including Subcontract drafting, Subcontract modification, Independent contractor agreements, Independent contractor agreement modifications, Subcontract closeout)
 - c. NDAs and TAs annually currently is 630+ and proposals we track are 600+ as over 1230 events and more documents since proposals may contain 3+ documents per proposal.
 - d. 1404 total active entries in current system.
- 20. How many contract types and templates / clauses are in scope of implementation
 - a. Currently we have 7 templates for subcontracts for approx. 30 companies, we have the intent to do commercial work and expand. We expect it to grow. Clause info depends on what is awarded. Non gov contract it could be infinite, we need ability to add.
 - b. We would like all contract types, Fed gov, state, local, commercial, etc. It needs to be flexible not based on a specific type.
- 21. What is the integration scope for the implementation? Please list the systems to be integrated with
 - a. Dec 15 2017 fully implement, See above for systems. (CP, PS, AP, etc)
- 22. What is the requirement for contract migration? How many contracts to be migrated? Do you want the vendor to also extract metadata from the document for migration or Cherokee Nation has the metadata extracted and can give us the documents and data in a format for us to the migration?

- a. We want to migrate what we have in the current system with all detail.

We will be accepting bids regardless of your FedRamp certification status but security will play a role in our analysis. If FedRamp certification is not available, respondents' system must comply with the Moderate baseline requirements of FedRamp and DFAR 252.204-7012.