

April 22, 2025

REQUEST FOR INFORMATION TO DEVELOP A CONTRACT LIFE MANAGEMENT SYSTEM

I. INTRODUCTION

The County of Kern, through Behavioral Health and Recovery Services (BHRS) is seeking information in the form of a proposal from one or more organizations that are qualified to develop a Contract Life Management system for the Contracts Unit. BHRS will review all responses received from qualified organizations and if a sufficient number of responses are received, the Department may, at its sole discretion, initiate a Request for Proposal process.

All information submitted by qualified organizations will be retained by Behavioral Health and Recovery Services (BHRS). The tentative rollout date for this system is April 1, 2026.

A. BACKGROUND

The management phase of the contract life cycle plays a vital role in ensuring the proper execution and compliance with the contract's terms. Efficient contract management helps reduce risks, streamline operations, and foster positive relationships among all parties involved. BHRS is seeking proposals from organizations that are able to develop a Contract Life Management system that addresses the following aspects of contract management:

Procurement

- ❖ Alert BHRS when a requests for proposals (RFPs) is needed.
- ❖ Alert BHRS when a requests for proposals (RFPs) is due.

Contract Creation

- ❖ Auto draft an agreement based on terms negotiated between parties.
- ❖ Develop and maintain contract templates.

Negotiation and Approval

- ❖ Obtain electronic approval from parties.
- ❖ The ability to route draft agreements to vendors for review
- ❖ -Allow vendors to redline and provide feedback comments.

Execution

- ❖ Obtain electronic signatures from parties.
- ❖ Distribute electronic copies to all parties involved.

Performance and Monitoring

- ❖ Track performance and ensure compliance with terms.

Renewal or Amendment

- ❖ If the contract has an expiration date, evaluate the need for renewal.

Termination or Close-Out

- ❖ Terminate the contract upon completion or expiration.
- ❖ Archive contracts.



B. DESIRED NEEDS

General Needs:

- ❖ 24/7 access from any digital device
- ❖ Include all necessary upgrades and maintenance for the duration of the agreement
- ❖ click and drag features
- ❖ auto drafting of contract templates with customization options
- ❖ auto drafting of board letter templates with customization options
- ❖ capacity to simultaneously review each stage of the process by different reviewers
- ❖ create a work queue for contracting processes
- ❖ contract repository for executed contracts
- ❖ create a user friendly system that combines people, processes, and technology in a way that allows BHRS to manage the contract life management process

Alerts:

- ❖ Alerts that determine which stage the contracts is in (e.g., drafting, review, ready for the board)
- ❖ Alerts that trigger staff to review and approve
- ❖ Alerts that trigger staff when the timeframes are missed
- ❖ Alerts that trigger when to renew a contract
- ❖ Alerts that trigger when a contract is exceeding its expenditure limits
- ❖ Alerts when the contract is ready for a procurement process
- ❖ Alerts that trigger an agreement is being terminated
- ❖ Alerts to terminate an agreement
- ❖ Alerts that trigger contract breeches

Routing:

- ❖ Route contract requests to all applicable parties
- ❖ Route contacts for review and signatures to internal and external parties

Reports

- ❖ Create a report that shows the flow of the contract through the contract life cycle
- ❖ Relevant reports for the department as it relates to the contract life cycle

User Interface

- ❖ Easy to navigate team dashboard showing contracts/amendments in process and status
- ❖ Requestor dashboard providing up to date tracking for users who request the drafting of agreements

Work Queue

- ❖ Contract work queue with the ability to assign tasks to team members.

C. VENDOR DEMONSTRATION

Provide Vendor Demonstration prior to committing to a Provider.

D. SUGGESTED MILESTONES

July 1, 2025 through September 1, 2025

Project Initiation

- ❖ Define objectives and scope.
- ❖ Assemble the project team.

- ❖ Develop a project plan and timeline.

Requirements Gathering

- ❖ Identify user needs and system requirements.
- ❖ Document functional and technical specifications.

October 1, 2025 through December 1, 2025

Design and Development

- ❖ Design the system architecture and user interfaces.
- ❖ Develop and test modules or features in stages.

Testing and Quality Assurance

- ❖ Conduct unit, integration, and system testing.
- ❖ Address bugs and ensure compliance with requirements.

January 1, 2026 through March 1, 2026

User Training and Documentation

- ❖ Prepare user manuals and training materials.
- ❖ Conduct training sessions for end-users.

April 1, 2026 through June 1, 2026

Deployment and Implementation

- ❖ Install the system in the production environment.
- ❖ Conduct final checks and ensure proper configuration.

July 1, 2026 through September 1, 2026

Post-Implementation Review

- ❖ Monitor system performance and address initial issues.
- ❖ Collect user feedback and plan for improvements.

As Need To Maintain A Healthy System

Ongoing Maintenance and Support

- ❖ Provide technical support and updates.
- ❖ Ensure the system continues to meet evolving needs.

II. INFORMATION INSTRUCTIONS

The Organization's response to this Request For Information (RFI) shall be submitted with all necessary information and documentation needed to demonstrate the Organization's ability to develop a Contract Life Management system described herein, in addition to the following:

A. ORGANIZATION INTRODUCTION

1. The information shall include an introduction describing the Organization, the size of the Organization, the number of employees who will be involved in developing the Contract Life Management system, its organizational structure, and its subcontractors or subconsultants, if any.

2. Include the legal name, address, telephone number, and type of entity (sole proprietorship, partnership, or corporation and whether public or private).

B. ORGANIZATION EXPERIENCE

1. The Organization should state the firm's experience and the number of consecutive years of actual experience in developing Contract Life Management systems.

2. Provide a minimum of three (3) reference letters for similar services rendered (must be within the last six (6) months on the reference company's letterhead. Each reference shall include a current point of contact and a phone number.

3. Each reference letter must have the following information: Date of the original contract; end date of the contract; services rendered; and names, addresses, and telephone numbers of contact persons within client agencies for whom the services have been provided.

C. CREDENTIALS/RESUMES

1. Credentials and resumes of the person(s) responsible for the development of the Contract Life Management system must be provided. Include a statement of qualifications and resumes/backgrounds of key personnel assigned to the project, including the number of years these employees have been providing services, training certifications of professional and non-professional personnel.

2. Organization shall specifically provide the following information on all management, supervisory and other key employees who will be providing services:

- a. Name, address and phone number
- b. Description of education
- c. General experience
- d. Experience or education related to the RFP project

D. PROJECT APPROACH

Note: As your organization drafts this section of the proposal, please answer each statement and ensure that your responses are no longer than 350 words.

1. Provide a detailed description of the project approach proposed by your organization to perform all required requirements specified in the Background, Desired Needs and Suggested Milestones section of this document.

2. Describe the actions that will be performed by your organization in order to comply and suggested milestones.

3. Describe your organization's approach and/or methodology that will be used to address obstructions, constraints, or roadblocks that may occur in meeting the suggested milestones.

4. Include specific details with regard to a work schedule which contains **an aggressive plan** describing how your organization will implement the development of the Contract Life Management system and meet the suggested milestones.

5. Specify all software and computer technology that is anticipated to be used in the development of the Contract Life Management system as specified in the Background, Desired Needs and Suggested Milestones section of this

document. If the Proposal includes the purchase of any software by the BHRS, provide a copy of any software license agreements that BHRS would be required to execute.

E. INDEMNIFICATION

Organization shall indemnify County against any claim, demands, or liability arising from damage to property, and injuries to persons, which may arise out of or because of Organization's performance of its duties under this Agreement, or failure to perform, but only in proportion to and to the extent such claim demands, damages or liability are caused by, or result from the negligent or intentional acts or omissions of Organization, its officers, agents, or employees.

F. INSURANCE

The Organization shall secure and maintain insurance as described below:

1. WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY INSURANCE REQUIREMENTS

In the event Organization has employees who may perform any services pursuant to this Agreement, Organization shall submit written proof that Organization is insured against liability for workers' compensation in accordance with the provisions of section 3700 of the California Labor Code.

Organization shall require any sub-contractors to provide workers' compensation for all of the subcontractors' employees, unless the sub-contractors' employees are covered by the insurance afforded by Organization. If any class of employees engaged in work or services performed under this Agreement is not covered by California Labor Code section 3700, Organization shall provide and/or require each sub-contractor to provide adequate insurance for the coverage of employees not otherwise covered.

Organization shall also maintain employer's liability insurance with limits of ONE MILLION DOLLARS (\$1,000,000) for bodily injury or disease.

2. COMMERCIAL GENERAL LIABILITY INSURANCE REQUIREMENTS

Organization shall maintain in full force and effect, at all times during the term of this Agreement, the following insurance:

Commercial General Liability Insurance including, but not limited to, Contractual Liability Insurance (specifically concerning the indemnity provisions of this Agreement with the County), Products-Completed Operations Hazard, Personal Injury (including bodily injury and death), and Property Damage for liability arising out of Organization's performance of work under this Agreement. The Commercial General Liability insurance shall contain no exclusions or limitations for independent contractors working on the behalf of the named insured. Organization shall maintain the Products-Completed Operations Hazard coverage for the longest period allowed by law following termination of this Agreement. The amount of said insurance coverage required by this Agreement shall be the policy limits, which shall be at least ONE MILLION DOLLARS (\$1,000,000) each occurrence and TWO MILLION DOLLARS (\$2,000,000) aggregate.

The Commercial General Liability Insurance required shall include an endorsement naming the County and County's board members, officials, officers, agents and employees as additional insureds for liability arising out of this Agreement and any operations related thereto. Said endorsement shall be provided using one of the following three options: (i) on Insurance Services Office (ISO) form Commercial General (CG) 20 10 11 85; or (ii) on ISO form CG 20 37 10 01 plus either ISO form CG 20 10 10 01 or CG 20 33 10 01; or (iii) on such other forms which provide coverage at least equal to or better than form CG 20 10 11 85.

3. AUTOMOBILE LIABILITY INSURANCE REQUIREMENTS

Automobile Liability Insurance against claims of Personal Injury (including bodily injury and death) and Property Damage covering any vehicle and/or all owned, leased, hired and non-owned vehicles used in the performance of services pursuant to this Agreement with coverage equal to the policy limits, which shall be at least ONE MILLION DOLLARS (\$1,000,000) each occurrence.

The Automobile liability Insurance required shall include an endorsement naming the County and County's board members, officials, officers, agents and employees as additional insureds for liability arising out of this Agreement and any operations related thereto. Said endorsement shall be provided using one of the following three options: (i) on Insurance Services Office (ISO) form Commercial General (CG) 20 10 11 85; or (ii) on ISO form CG 20 37 10 01 plus either ISO form CG 20 10 10 01 or CG 20 33 10 01; or (iii) on such other forms which provide coverage at least equal to or better than form CG 20 10 11 85.

4. PROFESSIONAL LIABILITY INSURANCE REQUIREMENTS

Professional Liability (Errors and Omissions) Insurance, for liability arising out of, or in connection with, the performance of all required services under this agreement, with coverage equal to the policy limits, which shall not be less than ONE MILLION DOLLARS (\$1,000,000) per occurrence and THREE MILLION DOLLARS (\$3,000,000) aggregate.

5. ADDITIONAL INSURANCE REQUIREMENTS

Any self-insured retentions in excess of TWENTY-FIVE THOUSAND DOLLARS (\$25,000) must be declared on the Certificate of Insurance or other documentation provided to County and must be approved by the County Risk Manager.

If any of the insurance coverages required under this Agreement is written on a claims-made basis, Organization, at Organization's option, shall either (i) maintain said coverage for at least three (3) years following the termination of this Agreement with coverage extending back to the effective date of this Agreement; (ii) purchase an extended reporting period of not less than three (3) years following the termination of this Agreement; or (iii) acquire a full prior acts provision on any renewal or replacement policy.

All insurance shall be issued by a company or companies listed in the current "Best's Key Rating Guide" publication with a minimum of A-, VII rating; or in special circumstances, as pre-approved by the Risk Management Division of the Office of County Counsel. The selected proposer shall file with the Contact Person, a Certificate(s) of Insurance stating the required coverages are in effect.

III. SUBMITTAL INSTRUCTIONS

A. SUBMITTAL

The proposer shall submit **one (1) written copy of the Proposal and one (1) copy on thumb drive**. The thumb drive (virus free) must be a standard Microsoft Windows (Word, Adobe, Excel etc.) compatible format readable by the County; using word processing software that is Windows based, preferably Microsoft Word. Proposer agrees to be fully responsible for any damage caused by any materials submitted to County. Please submit all Proposals to:

Kern County General Services Division
REQUEST FOR INFORMATION TO DEVELOP A
CONTRACT LIFE MANAGEMENT SYSTEM
1115 Truxtun Ave., 3rd Floor
Bakersfield, CA 93301
Telephone (661) 868-3000

Proposals may be delivered in person, by courier service or by mail to the address indicated above. **ALL PROPOSALS MUST BE SEALED AND RECEIVED BEFORE 11:00 A.M. on June 23, 2025**, at the above office and address.

Proposals submitted after the above deadline will not be accepted. It is strongly suggested that any proposers intending to hand deliver a proposal on the last day for submission arrive at the General Services Division third floor main lobby at least ten (10) minutes prior to the proposal receipt deadline to receive a “test” time stamp to validate the official current time. The time stamp clock in the main lobby of General Services will be the official time. Any Proposal received at or after 11:00 a.m. will be returned unopened.

B. QUESTIONS

Questions may be asked via e-mail only to Jewelle Scales, at jstyles@kernbhrs.org, no later than **12:00 noon on June 9, 2025**.