



Fulton County, GA

Department of Purchasing & Contract Compliance

October 20, 2014

Re: RFP 15RFP93819A-CC, Development of Standard Operating Procedures

Dear Proposers:

Attached is one (1) copy of Addendum 2 hereby made a part of the above referenced Request for Proposal.

Except as provided herein, all terms and conditions in the Request for Proposal referenced above remain unchanged and in full force and effect.

Sincerely,

Cheryl Cochran

Assistant Purchasing Agent

Winner 2000 - 2009 Achievement of Excellence in Procurement Award • National Purchasing Institute



This Addendum forms a part of the contract documents and **modifies** the original RFP documents as noted below:

The due date for receipt of proposal is changed to October 30, 2014, 11:00 A.M. local time.

The following changes are hereby made to the RFP:

1. Clause 2.5 Multi-Year Contract Term is deleted in its entirety under Addendum No. 1 and replaced by the following:

2.5 MULTI-YEAR CONTRACT TERM

The period of this Agreement shall consist of a series of Terms as defined below. The County is obligated only to pay such compensation under this Agreement as may lawfully be made from funds budgeted and appropriated for that purpose during the County's then current fiscal year.

a. Commencement Term

The "Commencement Term" of this Agreement shall begin **on January 1, 2015 or on the date of execution of contract, if executed after January 1, 2015**, and shall end absolutely and without further obligation on the part of the County on the 31st day of December, 2015. The Commencement Term shall be subject to events of termination and the County's termination rights that are described elsewhere in this Agreement. Notwithstanding anything contained in this Agreement, the County's obligation to make payments provided under this Agreement shall be subject to the County's annual appropriations of funds for the goods, services, materials, property and/or supplies procured under this Agreement by the County's governing body and such obligation shall not constitute a pledge of the County's full faith and credit within the meaning of any constitutional debt limitation.

b. Renewal Terms

Unless the terms of this Agreement are fulfilled with no further obligation of the part of either party on or before the final date of the Commencement Term as stated above, or unless an event of termination as defined within this Agreement occurs during the Commencement Term, this Agreement may be renewed at the written option of the County upon the approval of the County Board of Commissioners for one (1) one-year

("Renewal Term"). However, no Renewal Term of this Agreement shall be authorized nor shall any Renewal Term of this Agreement commence unless and until each Renewal Term has first been approved in writing by the County Board of Commissioners for the calendar year of such Renewal Term. If approved by the County Board of Commissioners, the First Renewal Term shall begin on the 1st day of January, 2016 and shall end no later than the 31st day of December, 2016. If the County chooses not to exercise any Renewal Term as provided in this Section, then the Term of this Agreement then in effect shall also be deemed the "Ending Term" with no further obligation on the party of either party.

c. Term Subject to Events of Termination

All "Terms" as defined within this Section are subject to the section of this Agreement which pertain to events of termination and the County's rights upon termination.

d. Same Terms

Unless mutually agreed upon in writing by the parties, or otherwise indicated herein, all provisions and conditions of any Renewal Term shall be exactly the same as those contained within in this Agreement.

e. Statutory Compliance Regarding Purchase Contracts.

The parties intend that this Agreement shall, and this Agreement shall operate in conformity with and not in contravention of the requirements of O.C.G.A. § 36-60-13, as applicable, and in the event that this Agreement would conflict therewith, then this Agreement shall be interpreted and implemented in a manner consistent with such statute.

2. Under Section 3.3 Scope of Work, the following last bullet under, "The successful vendor shall," is deleted in its entirety.
 - Develop a web-based content management system to log, track and maintain Standard Operating Procedures (SOPs). The web based-based content Management System will allow SOPs to be stored on the Fulton County server which will allow access by employees to SOPs throughout the organization
3. 3.4 Project Deliverables paragraphs a, and h through l are deleted in their entirety.
4. The not to exceed" value of \$110,864.00 in Exhibit E – Compensation is deleted in its entirety.

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Addendum No. 2

Page Three

5. Under Section 9 Exhibit, the last item below under the Required Proposal Submittal Checklist is deleted in its entirety.

Verify that Bidder/Proposer is registered w/Georgia
Secretary of State and attach a copy of print-out for each.

6. Responses to questions submitted by interested vendors are included under Attachment 1.
7. A Sample EBO Plan is included as Attachment 2.

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Addendum No. 2

Page four

ACKNOWLEDGEMENT OF ADDENDUM NO. 2

The undersigned proposer acknowledges receipt of this addendum by returning one (1) copy of this form with the proposal package to the Department of Purchasing & Contract Compliance, Fulton County Public Safety Building, 130 Peachtree Street, Suite 1168, Atlanta, Georgia 30303 by the RFP due date and time October 30, 2014 at 11:00 A.M.

This is to acknowledge receipt of Addendum No.2, _____ day of _____, 20__.

Legal Name of Proposer

Signature of Authorized Representative

Title

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RESPONSES TO QUESTIONS SUBMITTED BY INTERESTED VENDORS

1. Question: How many procedures are in existence now?

Response: There are only general workplace procedures in existence currently.
2. Question: Roughly how long, in pages, are these existing procedures?

Response: The procedures average about 2 pages but are not to be compared with the technical procedures for the various processes that we are seeking.
3. Question: What is the time frame for beginning and completing this project?

Response: January 1, 2015 or upon execution of contract in 2015 if after January 1, 2015 through December 31, 2015 with an option to renew for one additional year.
4. Question: Where does the work need to be done? 1 location or many?

Response: The procedures do not have to be drafted onsite but it will be necessary to interview SMEs onsite. Several different areas across two bureaus will need SOPs
5. Question: Can you elaborate on the activities and responsibilities (e.g., property tax, appraisals) of the Real Estate division that is to be included in the scope of this project?

Response: Real Estate Recording, Records Processing & Record Room Operations – The purpose of this program is to file, record, index, scan and/or microfilm real estate and related non-real estate documents, business records, military discharge records, plats and surveys; to collect filings fees, transfer tax and intangible tax; to create permanent archival records of all documents filed with the Clerk of Court; to provide excellent customer service and access to all public records located within the Clerk's Office.
6. Question: Can you provide detail around the importance of the County's Land Management System to this project?

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Response: The Clerk's Office Land Management System is a repository that is used by the public, the Georgia Superior Court Clerk's Authority, the Tax Commissioner and the Tax Assessor. It is important that information is scanned into the system, indexed and verified correctly.

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7. **Question:** **Would it be possible for the County to publish the current set of Standard Operating Procedures (SOP's)? If not, would it be possible to provide a representative sample containing a highly complex SOP, one of medium complexity, and one of relatively low complexity?**

Response: Will be provided under Addendum No. 3.

8. **Question:** **How many individual SOP's are currently in place? Is this number expected to increase or decrease as a result of this project?**

Response: Will be provided under Addendum No. 3.

9. **Question:** **Would the County please list the operational areas (e.g., intake, docketing, finance) that are expected to be included in the scope of this project, along with an approximate count of SOP's for each operational area? The content of our Cost Proposal will be largely dependent on the volume of SOP's.**

Response: Will be provided under Addendum No. 3.

10. **Question:** **Is it the County's intent that the Cost Proposal be structured as a time and materials fee schedule or a firm fixed price?**

Response: Firm Fixed Price

11. **Question:** **Does the County have an anticipated start, anticipated completion date, or anticipated duration for the project? If so, please provide.**

Response: January 1, 2015 or upon execution of contract in 2015 if after January 1, 2015 through December 31, 2015 with an option to renew for one additional year.

12. **Question:** **Please describe the process by which the "lowest total cost" will be determined during the evaluation and scoring process. Will "lowest total cost" be judged by the value of the "Total Fee" column in the Cost Proposal Form? If so, can you please clarify how the winning proposer will be held accountable for the accuracy of the total cost?**

Response: Please see Section 7 – Cost formula. The vendor with the lowest cost will get the maximum points of 13. Then the lowest cost submitted by that vendor will be divided by each vendor’s cost times 13 points allocated for cost will equate to each individual points cost each vendor will receive.

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13. Question: Can you please clarify if the Cost Proposal is worth a maximum of 10 points, 10% of the overall weighting, 13% of the overall weighting, or some other value in the County’s evaluation process?

Response: It is 13% of the overall weight.

14. Question: Does the County currently use a document management or content management system? If so, does the County have a preference to use that system for the “web-based content management system” that the SOPs will be stored in? If not, does the County own licenses of SharePoint to use for this purpose?

Response: There will not be a need to develop a “web-based CMS.” The change is reflected under Addendum No. 2.

15. Question: Section 3.3 - Scope of Work - Please clarify whether there will be a need for site specific SOPs for all or any of the five (5) offices.

Response: We may find that there is a need for site specific SOPs but currently there are not.

16. Question: Section 3.3 - Scope of Work - Please clarify whether there will still be a need to "develop a web-based content management system to log, track, and maintain Standard Operating Procedures (SOPs)." Also, indicate the expected timeframe for the development of the web-based content management system.

Response: There will not be a need to develop a “web-based CMS.”

17. Question: Section 3.5 - Technical Proposal Format and Content - Section 2 - Project Plan or Project Approach - First paragraph, second to last sentence of the paragraph, states "The project plan should also demonstrate the processes that will be utilized to develop the Strategic Plan for the Clerk of Superior Court." Please clarify whether there is an expectation of a Strategic Plan in conjunction with this work as stated in this sentence. Also, please indicate the expected timeframe for the development of the Strategic Plan if it is expected.

Response: There is an expectation of a work plan or implementation plan for the project. The strategic plan or implementation plan should be included in the proposal.

18. Question: Please clarify if the “web-based content management system” should be fully populated with the new SOPs within 90 days of notice to proceed, or simply operational.

Response: The “web-based management system is not required as stated under Addendum No. 2.

19. Question: Can you please confirm that items k and l in Section 3.4 are duplicates of items f and g?

Response: Yes. They are duplicates which one group has been deleted under Addendum No. 2

20. Question: Please clarify if the “not to exceed” value of \$110,864.00 in Exhibit E – Compensation should be understood to be the total maximum value of the contract resulting from this procurement.

Response: Please ignore. That price has nothing to do with this project. It was part of a different contract and inadvertently left as a result of copying and pasting. It is removed under addendum No. 2.

21. **Question: Please clarify the concept of the bi-weekly “Process Flow Review reports.” Are these meant to be bi-weekly status reports of progress, tasks completed, tasks not completed and tasks planned for the next two weeks?**

Response: Will be provided under Addendum No. 3.

22. Question: Does the County have a specific format in mind for the “Process Flow Review reports” and the monthly reports to be delivered to the Director of Internal Auditing?

Response: Will be provided under Addendum No. 3.

23. Question: Please clarify if the use of First Source Jobs is a requirement if no “entry level jobs” are anticipated by the bidder.

Response: No, if not anticipated.

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24. Question: **How many employees does the County anticipate the selected vendor meeting with? In what format (e.g., group interviews, one-on-one interviews, process orientation) does the County envision the selected vendor interacting with County employees?**
- Response: Will be provided under Addendum No. 3.
25. Question: **Does the County anticipate a phased approach to developing the SOP's, based upon role or functional area? If so, please provide detail related to the County's anticipated phases or approach.**
- Response: Will be provided under Addendum No. 3.
26. Question: Additionally, we would like to request a copy of the Equal Business Opportunity (EBO Plan) and any templates offered during the meeting by Ms. B.B. Love.
- Response: The EBO sample is attached to this addendum
27. Question: Section 3.3 - Scope of Work - Please clarify whether there will be a need for site specific SOPs for all or any of the five (5) offices
- Response: The County may find that there is a need for site specific SOPs but currently there are not.
28. Question: Section 3.3 - Scope of Work - Please clarify whether there will still be a need to "develop a web-based content management system to log, track, and maintain Standard Operating Procedures (SOPs)." Also, indicate the expected timeframe for the development of the web-based content management system.
- Response: There will not be a need to develop a "web-based CMS." The change is reflected under Addendum No. 2.
29. Question: Additionally, we would like to request a copy of the Equal Business Opportunity (EBO Plan) and any templates offered during the meeting by Ms. B.B. Love.
- Response: The EBO sample is attached to this addendum.
30. Question: What is the initial or anticipated term of the contract?

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Response: On January 1, 2015, or upon execution of contract if executed after January 1, 2015 through December 31, 2015 with an option to renew for one year. Please see Addendum No. 2 which reflects this change.

31. Question: As stated in the pre-bid conference, will the contract have an option to renew after the initial contract period?

Response: Yes. Please see response to question no. 30 above.

32. **Question: Are the existing policies and procedures available for review before the proposal deadline?**

Response: Will be provided under Addendum No. 3.

33. Question: As per the pre-bid conference, will the deliverable for the web-based management system be stricken from deliverables list? If the web-based management system is not stricken from the deliverables list, why is it to be completed first, before the content is written and approved? It seems that the content should be written first, then uploaded on the website.

Response: Yes. It is deleted under Addendum No. 2.

34. Question: Will items H-L be deleted from the deliverables list as they are duplicate items of B-G?

Response: Yes. They are deleted under Addendum No. 2.

35. Question: **What is the difference between item D and E in section 3.4 other than the county's comments are to be part of the 7? In section 2- Project plan or project approach, there is a reference to the development of a strategic plan. More specifically, "the project plan should also demonstrate the processes that will be utilized to develop the Strategic Plan for the Clerk of Superior Court." Is this Strategic Plan a deliverable? If so, it is not listed in the deliverables list.**

Response: Will be provided under Addendum No. 3.

36. **Question: Will access be granted to the documents (before the deadline) mentioned in the pre-bid conference that Mr. Lane indicated he would provide?**

Response: Will be provided under Addendum No. 3.

37. Question: Section 3.3 (Scope of Work) indicates in the last bullet point of the section that the successful vendor shall "Develop a web-based content management system

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to log, track and maintain Standard Operation Procedures (SOPs). The web based-based content Management System will allow SOPs to be stored on the Fulton County server which will allow access by employees to SOPs throughout the organization.” In accord with this Scope of Work requirement, is it expected that the successful bidder will provide a new automated electronic program to address the SOP management system or can the system be developed through the expanded use of an existing or Fulton County provided compatible software to which the Court has access?

Response: That section is deleted in its entirety under Addendum No. 2.

38. Question: Section 3.5 (Technical Proposal Format and Content), under Section 7 – Cost, please clarify what is to be included in this portion of a respondent’s Technical Proposal.

Response: No cost information should be provided under this section. Please see response to question No. 14 above.

39. Question: Section 3.5 (Technical Proposal Format and Content), under Section 9 – Proposer Financial Information, please clarify whether access to a line or letter of credit is required for the successful respondent.

Response: All companies submitting a response to this project must identify any evidence of access to a line or letter of credit with the proposal. This will be evaluated prior to award of contract.

40. Question: Section 6.4 (Required Forms and EBO Plan) states that “In order to be compliant with the intent and provisions of the Fulton County Non-Discrimination in Purchasing and Contracting Ordinance (99-h0960), bidders/proposers **must** submit the following completed documents...Exhibit A...Exhibit B...Exhibit C...Exhibit D...Exhibit E...Exhibit F...Equal Business Opportunity Plan...Exhibit H...Form 1. The following document must be completed as instructed if awarded the project: Exhibit G...Exhibit H...Form 2.” However, the next statement reads “All Contract Compliance documents (Exhibits A – H and EBO Plan) are to be placed in...These documents are considered part of and should be submitted with the Technical Proposal.” Please clarify which Exhibits **must** be included with the Technical Proposal and which Exhibits must be completed only if awarded the project.

Response: Exhibits A, B, and E; C and D if subcontracting; F if a joint venture; G after award; the EBO plan and Exhibit H, Form 1 and 2 if applicable.

41. Question: Section 6, Exhibit H (Fulton County First Source Jobs Program) states that ...This policy will apply to all contracts procured through the Department of

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Purchasing & Contract Compliance valued in excess of \$200,000. The Prime Contractor is expected to utilize the First Source Jobs Program to fill 50% of the entry level jobs which arise as a result of any project funded in whole or in part with County funds with residents of Fulton County." Please clarify whether Exhibit H Form 1 and/or Form 2 are required to be submitted if a bidder's Cost Proposal will be less than \$200,000.

Response: No. It is not required but a vendor can always utilize the program, if needed.

42. Question: Section 8 (Sample Contract), Exhibit E (Compensation) states that "County agrees to compensate Consultant for all services performed under this Agreement in an amount not to exceed \$110,864..." Please clarify whether this is the maximum amount that the County has budgeted for this contract.

Response: The amount was inadvertently copied and pasted from another project. The "not to exceed" value of \$110,864.00 in Exhibit E – Compensation is deleted in its entirety under Addendum No. 2.

43. Question: Section 9 (Exhibit), in the Required Proposal Submittal Check List, the last item indicates to "Verify that Bidder/Proposer is registered w/Georgia Secretary of State and attach a copy of print out for each." However, Section 2.22 (Authorization to Transact Business) indicates that "If the Proposer is a foreign (non-Georgia) corporation, prior to contract execution shall submit a Certificate of Authority..." Please clarify whether this **must** be included with a respondent's proposal or whether this is only required for the successful respondent.

Response: The last item under the Required Proposal Submittal Checklist is deleted in its entirety by Addendum No. 2.

44. **Question: Does Fulton County currently have a platform that they would like the web content developed on or are they expecting the vendor to provide that platform? If they do have a platform, could you please provide the specifications for that platform?**

Response: Will be provided under Addendum No. 3.

45. Question: Our understanding from the pre-proposal conference is that the time frame for this project will be changed to 1 year with a one year renewal. Could you please confirm?

Response: January 1, 2015 or upon execution of contract in 2015 if after January 1, 2015 through December 31, 2015 with an option to renew for one additional year. Please see Addendum No. 2 for changes to the contract term.

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46. Question: How many SOPs, Procedures and Processes are to be included in this effort?

Response: That will be driven by the number of processes that are identified through the planning process.

47. Question: Can the County provide a copy of the current SOPs that are in need of revision?

Response: The County does not have any that need revising. They need to be written.

48. Question: What are the seven divisions that were mentioned at the Pre-proposal conference that are to be included?

Response: They are as follows:

Courts Bureau

- i. Internal Services
- ii. External Services
- iii. Records Management

Administration Bureau

- iv. Administrative Services- (HR/Budget/Procurement/Project Management)
- v. Constituent Services -(PR/Inter-Governmental Affairs/Annex Services)
- vi. Board of Equalization (BOE)/Fiscal Services (Accounting/Mail Room/Board Members)
- vii. Real Estate Services -(Records Processing/Recording/Record Room)

49. Question: When does Fulton County expect to award the work for this RFP?

Response: January 1, 2015 or upon execution of contract in 2015 if after January 1, 2015 through December 31, 2015 with an option to renew for one additional year. Please see Addendum No. 2 for changes to the contract term

50. Question: How many procedures are in existence now?

Response: There are only general workplace procedures in existence currently.

51. Question: Roughly how long, in pages, are these existing procedures?

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Response: The procedures average about 2 pages but are not to be compared with the technical procedures for the various processes that we are seeking.

52. Question: What is the time frame for beginning and completing this project?

Response: Please see Addendum No. 1 for changes to the contract term.

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53. Question: Subcontractor Georgia Security and Immigration Sub-contractor Affidavit - Do all sub-contractors need to complete this form if they are not a business entity, but rather will be providing service as a consultant or independent contractor? Consultants or independent contractors may not necessarily be registered in E-Verify.

Response: Yes

54. Question: Ms. Love mentioned in the pre-proposal conference that she would provide language that meets the contract compliance standards for the following:

First Source Jobs program, determination of good faith efforts and EBO plan.

Response: The EBO sample is attached to Addendum No 2.

55. Question: Our understanding is that if the business does not own any automobiles that are driven by employees, the business automobile insurance is not necessary, as any losses would be covered under the umbrella liability policy. Could you please confirm this? Thanks so much.

Response: The vendor should have coverage for "Non-Owned and Hired" Auto Liability under the General Liability policy. If not, the vendor needs to have that coverage attached via Endorsement under the General Liability policy or procure a separate auto liability policy for that coverage.

Company Name
1045 Reunion Place SW
Atlanta, GA 30331
(404) 428-7299

Equal Business Opportunities Plan (EBO)

Question 1

(A. if company can do the job)

A. Company name has reviewed the solicitation carefully and knows that diversity and equal business opportunity are important to Fulton County. The plan of our company (you can put your company name if you wish) would be to increase opportunities of diversity by hiring minority and female own business as subcontractors with our company when opportunities are available. (At this time we have no opportunities within the scope of work that need to be sub-contracted out. We can handle all responsibilities but if the opportunity comes about we will solicit qualified minority and female businesses.)

(B. if company is going to use services)

B. Company name has reviewed the solicitation carefully and knows that diversity and equal business opportunity is important to Fulton County. Our company will be using subcontractors for the following services: (then put the type of service) ex. Clerical, Attorney's and examiners.

Question 2

A. Efforts that would be made by (**Company name**) to encourage, use and solicit minority and female owned business would be to:

1. Use the **Fulton County's Minority and Female Data Base (because there vendors are qualified and certified with the county).**
2. **Advertise** in various local newspaper that are utilized by minorities and female owned business and the local paper as a whole. Also, advertise on the Fulton Counties web site.
3. **Joint venture** with a minority and female owned companies.
4. **Network** with companies that specialize in the same service and/or commodity that our company does by utilizing the vendor list from the pre-bid conference.