

# Business Procedure Documentation Services

## Questions & Answers

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# Request for Proposal

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July 2022



**Orange County Employees Retirement System (OCERS)**

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Question	Response
<p>1. Will OCERS be contacting each reference and will OCERS provide a timeframe for when they will be contacting references so the references can be properly notified? (Section 7.6)</p>	<p>OCERS intends to contact each provided reference. This will occur during the “<b>OCERS Review of RFP Submissions</b>” period identified on page 5 of the RFP document and is expected to take place between August 4 and August 22, 2022.</p>
<p>2. How many pages in total are the procedures? (Exhibit A, 2.a)</p>	<p>OCERS is unable to provide an accurate page count due to the various states in which documentation resides. As noted in <b>Exhibit A, 2.a</b>, on page 10 of the RFP document, 158 procedure documents of the 257 in-scope procedures are in either “In Progress” or “Not Started” state.</p>
<p>3. Can all information gathering be done remotely or via electronic communication with subject matter experts? Does the subject matter require the selected vendor to come onsite and meet with subject matter experts in person? (Exhibit A, 2.a)</p>	<p>OCERS expects most if not all information gathering can occur remotely utilizing electronic communication, screen-sharing applications, etc. OCERS reserves the right to require the selected vendor to be onsite for certain meetings, if OCERS deems such meetings require an onsite presence, such as for a presentation to the OCERS Board of Retirement on the procedure documentation project. OCERS will include an expense reimbursement provision in the Services Agreement.</p>
<p>4. Will electronic signatures suffice for the proposal response or do we need to provide original, ink signatures? (Exhibit B, Exhibit C)</p>	<p>Electronic signatures are acceptable.</p>
<p>5. Do we price out the additional option years? Or the one-time period? (Section 3.4)</p>	<p>Please provide pricing for the initial scope of the project as identified in <b>Exhibit A</b> on pages <b>10-11</b> of the RFP document. If additional work is required subsequent to the initial contract period, additional statements of work may be considered.</p> <p>Please see the responses to <b>Questions 7, 11</b> and <b>14</b> below for additional information.</p>
<p>6. Agreement Exhibit C is missing, please provide.</p>	<p>Agreement Exhibit “C” is to be provided by the selected vendor. Please see <b>Exhibit C, 2.4.5</b>, on page <b>14</b> of the RFP document for additional information.</p>

7. If Option Years are executed, are new procedures going to be given, or will the same ones will be used? (Section 3.4)

OCERS desires to complete the currently scoped procedure documents within the initial contract period.

Dependent on the successful conclusion of the initial engagement, OCERS may seek to issue additional statements of work in order to accomplish additional items, such as those identified in **Exhibit A, 8**, on page **11** of the RFP document.

8. Does OCERS recognize the GSA rate card as valid for this bid?

Yes, OCERS will consider the GSA rate card should that constitute the vendor's best offer in response to this RFP.

9. Is there an existing document management system (DMS) used?

There is no formal DMS in use at OCERS at this time. Should the selected vendor recommend a SharePoint-based document management system, OCERS does currently utilize SharePoint for other purposes.

As noted in **Exhibit A, 5**, on page **10** of the RFP document, document management lifecycle best practices are within the scope of this engagement. OCERS would like RFP respondents to include in their RFP submissions, in whatever depth the vendor deems appropriate, information on document lifecycle management best practices, including the use of a DMS, if recommended.

Closely related but separate to this engagement, OCERS is also investigating enterprise DMS solutions. OCERS seeks to ensure that any selected DMS will fulfill the document management lifecycle best practices recommended by the selected vendor.

10. Is the work remote, onsite or a combination of remote and onsite?

Please see response to **Question 3** above.

11. What is the initial term of the contract?

OCERS seeks a one-year (12 month) initial contract term. Regardless of the length of the initial contract term, OCERS seeks to expedite completion of the in-scope procedure documentation as much as possible.

12. Are we required to provide full resumes of all personnel submitted for this contract or is a comprehensive summary bio preferred?

OCERS does not have a preference. Vendors should provide what they believe is sufficient information for OCERS to make a vendor selection.

**13.** Do we have an example of a procedure? OCERS is unable to provide example procedure documentation until an executed contract is in place.

**14.** Does OCERS have a preference of a T&M contract or fixed fee? OCERS prefers fixed fee contracts but is open to other pricing structures. Please note, as stated in **Exhibit A, 3**, on page **10** of the RFP document, in addition to the 257 procedures identified thus far, we expect to identify as many as 20-25% additional business procedures requiring documentation during the project. Vendors should identify in their RFP submission how they propose to address the costs associated with newly identified documents.

**15.** We are interested to know if this Procedure Documentation Initiative is a standalone project or being done in conjunction with or prior to a longer term OCERS project. If yes, could you help us understand more about the other project? The Business Procedure Documentation Services initiative is a standalone project but is closely related to another initiative to identify a Document Management System (DMS) as noted in the response to **Question 9** above. Additionally, dependent on the successful conclusion of this engagement, OCERS has identified additional documentation services in which the selected vendor may be asked to participate, as identified in **Exhibit A, 8**, on page **11** of the RFP document.