



## **ATTACHMENT A SCOPE OF WORK**

### **1. Introduction**

The Superior Court of California County of Alameda “Court” seeks proposals from qualified vendors to provide a comprehensive, secure, and user-friendly Contract Management System (CMS). The system will support the Court’s contract administration processes by centralizing contract records, improving workflow efficiency, and enhancing tracking, reporting, and compliance capabilities. The selected solution must be scalable, easy to implement, and capable of expanding into a full lifecycle contract management platform as the Court’s needs evolve.

### **2. Purpose and Objectives**

The purpose of this project is to implement a CMS that enables the Court to effectively manage all contract-related activities, from storage to tracking, notifications, and reporting and an option for document creation. The CMS should streamline and automate processes to improve visibility, accuracy, and timely contract administration. As part of this process the awarded bidder will facilitate migration efforts of existing contract data into the CMS, the Court houses nearly 1,000 active contracts and amendments executing between 300-500 annually.

Primary objectives include:

- Centralize all contract documents in a secure, organized digital repository.
- Automate assignment of contract numbers and maintain consistent version and document control.
- Provide configurable notifications, alerts, and reminders to ensure timely actions and compliance.
- Enable staff to efficiently perform contract administration duties through intuitive workflows.
- Generate reports that support decision-making, compliance monitoring, and workload management.
- Provide a system capable of future enhancements, including expansion to full contract lifecycle management.

### **3. Project Scope**

The selected vendor shall provide a Contract Management System and related services that include system configuration, integration, testing, deployment, user training, and ongoing technical support.

The scope includes, but is not limited to, the following functional and technical requirements including those specified in Appendix B – Technical Requirements and Qualifications.

### **4. Functional Requirements**

#### **4.1 Contract Repository & Document Management**

- Centralized, searchable storage for all contract documents, files, and related attachments.
- Ability to sort, categorize, and filter contracts by vendor, type, date, department, dollar value, status, expiration, or custom fields.
- Version control for tracking document edits, updates, and approvals.
- Secure access permissions, with role-based viewing and editing rights.
- Ability to upload/download various contract related documents such as Certificate of insurance and good standing and other state and local required documentation.

#### **4.2 Contract Number Assignment & Tracking**

- Automatically generate and assign unique contract numbers based on Court-defined rules.
- Track contract status from initiation through execution, renewal, amendment, and close-out.
- Provide user-friendly dashboards summarizing contract workload and status.

#### **4.3 Notification & Alert Capabilities**

- Automated notifications for key contract milestones such as expiration dates, renewals, deadlines, required actions, or pending approvals.
- Configurable alert parameters with options for email and in-system messaging.
- Escalation notifications for overdue or high-priority items.

#### **4.4 Editing & Collaboration**

- Audit trails that record all changes, edits, approvals, and user activity.
- Support for internal collaboration among Court departments.

#### **4.5 Reporting & Analytics**

- Standardized and customizable reporting options.
- Ability to create, export, and schedule reports related to contract volume, status, expiration, financial data, workload metrics, and compliance indicators.
- Dashboard views for administrators and end users.

#### **4.6 Workflow & Administration Tools**

- Configurable workflows for contract routing, approval, and review.
- Administrative tools to manage user roles, permissions, templates, metadata fields, and workflows.

#### **4.7 System Integration**

- Ability to integrate with existing Court systems (One Drive, SharePoint and potentially SAP Pheonix in future expansions, etc.) where applicable.
- Support for APIs or other integration methods to enable interoperability.

#### **4.8 Future Expansion**

- Architecture that supports scalability and additional modules for contract lifecycle management, including:
  - Solicitation management
  - Vendor management
  - E-signature tools
  - Budget and spend tracking
  - Performance monitoring
  - Legal Review
  - Edits such as redlines, change proposals, acceptance and declines.
  - Negotiation
  - Contract approval execution workflow

### **5. Technical Requirements**

#### **5.1 Security & Compliance**

- Provide data encryption at rest and in transit.
- Support multi-factor authentication and role-based access.
- Maintain audit logs for all system activity.
- Bidder must address the various technical requirements referenced in Attachment B – Technical Requirements and Qualifications

#### **5.2 System Architecture**

- Cloud-based Software as a Service (SaaS), with justification.
- High availability and disaster recovery capabilities.
- Optional mobile and browser compatibility.

#### **5.3 Usability**

- User-friendly interface that requires minimal training to operate.
- Intuitive navigation, dashboards, and self-service features.

- Accessibility compliance (e.g., WCAG 2.1 AA standards).

#### **5.4 Implementation & Support**

Vendor must provide:

- Implementation plan, including configuration, data migration, testing, and deployment.
- Training for administrators and end users.
- User manuals or online help resources.
- Ongoing technical support, system updates, and maintenance.

#### **5.5 Deliverables**

The selected vendor shall deliver the following:

1. Project kickoff and implementation plan
2. Configured Contract Management System, meeting all functional and technical requirements
3. Data migration plan and completed migration, if applicable
4. Integration with Court systems, where required
5. User acceptance testing support
6. Training for Court staff
7. Documentation, including system configuration, workflows, and user guides
8. Ongoing support and maintenance plan

#### **6. Performance Expectations**

The CMS shall:

- Maintain consistent uptime and reliability per service-level agreements.
- Process searches, uploads, and workflow actions efficiently and simultaneously across multiple users.
- Ensure secure and accurate execution of all contract administration tasks.
- Provide responsive vendor support for technical issues or system updates.

#### **7. Vendor Qualifications**

Vendors must demonstrate:

- Proven experience implementing CMS solutions for government, judicial, or public-sector agencies.
- Successful project completions of similar size and complexity.

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- Ability to provide references and system demonstrations.
- Capability to support future system growth and enhancements.