**The Regents of the University of California**

***REQUEST FOR INFORMATION***

Request for Information

For

***CONTRACT LIFECYCLE MANAGEMENT***

***RFI#20220725***

Date Issued

:

 July 25, 2022



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| Issued By: | University of California Health, Office of the President  |
| RFI Administrator:  | Judy Kogut-O’Connell |
|   | jkogocon@ucop.edu |
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B. ATTACHMENT "A" MUST HAVE REQUIREMENTS

# I. General information about this RFI

##  A. Purpose of this RFI

The purpose of this Request for Information (“RFI”) is to solicit information from qualified suppliers (“Bidders”) for a proposal and price on the implementation of a Contract Lifecycle Management System(“CLM”) in accordance with the requirements defined in this RFI for purposes of financial planning.

The University of California (“UC Health”) may leverage the information, data, comments, or reactions obtained in this RFI as research for a future solicitation. This RFI does not constitute an Invitation for Bid, Request for Proposal, or Informal Request for Bid or Proposal and is not to be construed as a commitment by the University of California Health.

##  B. Background

UC Health provides leadership and strategic direction for UC’s five academic medical centers (UC Davis,

UC Irvine, UC Los Angeles, UC San Diego, and UC San Francisco) and 17 health professional schools. UC Health’s central office supports operational initiatives at individual campuses and development of system-wide initiatives, promoting collaboration among the university’s health professional schools and providing oversight on the business and financial activities of the clinical enterprise.

The UC Health central office has a number of initiatives including the Supply Chain transformation which includes a strategic centralized contract management system to achieve the financial goals, ensure compliance to Public Contracting Codes, State and Local laws and improve the cycle time of our contracting Procurement Professionals.

##  C. Proposed Scope of Services

 **RFI must include the following in the proposal:**

A detailed Proof of Concept plan for the proposed implementation of the CLM Software including a committed and dedicated team.

A detailed description of the proposed team including but not limited to their title and resumes.

A detailed implementation timeline and a comprehensive financial estimate based on the ‘must-have’ requirements outlined in Attachment “A.” Some frequently asked questions are answered below for your proposal.

State in the proposal the associated fees for help desk, training, and on-line support.

Fees for initial configuration if required. That includes relabeling and repurposing existing fields.

The current version of the software being requested is a Cloud Solution.

No migration required at this time for UCOP.

Annual License Estimates:

* Create/Edit including redlining and negotiating = 100
* Review & Approve - 20
* View Only – Unlimited
* View Only – Audit timeframe
* E-Signature functionality adapter/integration to DocuSign, Adobe Sign and Verisign
* Integrations:

Secure File Transfer Protocol files into the CLM application from Lawson, Premiere, Oracle, and Salesforce. (i.e., pull or push delta of new documents into the CLM database.)

* UC will need AI capability to compare third party paper to UC standard language/ clauses.
* UC will need standard reports out of the CLM system that do not exist today.

One Time Installation costs:

* UCOP 200 Active agreements not including Amendments or Scope of Work will need to be entered into the system. This may be manual for UCOP as they are stored on a SharePoint drive and may need later migration for the UC Health Locations.
* The formats of the UC documents include .Pdf, MSWord, Excel, .jpeg, emails and .ppt
* The metadata that UC will need to be captured includes but not limited to Contract Term period -Start/End, Contract#, Supplier Contact, Buyer Contact, COI Start/End Date, Procurement Contact, Systemwide vs. UC local Contract, SBE (Y/N), Sole Source (Y/N), Diverse Supplier (Y/N), BAA (Y/N), DS (Y/N), to name a few.
* UC will need to have Master Agreements, Amendments, Scope of Work, Addendums, Fair Wage/Fair Work Certifications. Letter of Intent, NDAs, CDAs, and Purchase Orders including the capability of tracking the Parent/Child relationships.
* UC will need a template library, clause library mirroring the current template clauses with optional language and annotations approved by Legal.
* There are associated documents (i.e., Master Agreement, amendments, SOWs, NDAs, and Fair Wage/Fair Work certifications for each agreement)
* There are multiple template types, UC Health has 8 standard templates however UC will need the ability to upload additional templates created in MS Word editor or an Adobe editor.
* The application requirement is English only.
* UC would like to add AI that will be configured to do legacy migrations in a phased approach. ( it will help pull data from contracts into templates)

**Names and locations where access to the Contract Management may be required:**

**UC Davis**

UC Davis Medical Center, 2315 Stockton Blvd, Sacramento, CA 95817

#### **UC Irvine**

UC Irvine Medical Center, 101 The City Drive South, Orange, CA 92868

**UC Los Angeles**

Ronald Reagan UC Los Angeles Medical Center, 757 Westwood Plaza, Los Angeles, CA 90095

Santa Monica UCLA Medical Center, Santa Monica, CA 90404

#### **UC San Diego**

UC San Diego Health System, Hillcrest, 200 W Arbor Dr, San Diego, CA 92103

UC San Diego Health System, La Jolla, 9300 Campus Point Drive, La Jolla, CA 92037

#### **UC San Francisco**

UC San Francisco Medical Center at Mission Bay, 1825 Fourth St.

San Francisco, CA 94158

UCSF Medical Center at Mount Zion, 1600 Divisadero St.

San Francisco, CA 94115

UCSF Medical Center at Parnassus, 505 Parnassus Ave.

San Francisco, CA 94143

Affiliate: UCSF Benioff Children’s Hospital Oakland, 747 52nd St, Oakland, CA 94609

 **Overall Responsibility and Program Expectations**

 The UC Health system requires its partner(s) to offer support that is required to run a health system and

 scale with us as we transform the Supply Chain to Bleeding edge and Best in Class.

 It is also the expectation of the UC Health system that any potential contract leverages the collective

 aggregate spend of the health systems, campus locations and affiliates.

##  D. Issuing Office and Communication

This RFI, and any subsequent addenda to it, is issued by the Regents of the University of California on behalf of the University of California Health. University of California Health is the sole point of contact regarding all procurement and contractual matters relating to the requirements described in this RFI. University of California Health is the only office authorized to change, modify, or clarify the specifications or terms and conditions of this RFI.

All communications including questions concerning this RFI should be addressed in email:

Judy Kogut-O’Connell

Strategic Sourcing Manager

University of California Health, Office of the President

[jkogocon@ucop.edu](file:///C%3A%5CUsers%5Cjkogutoc%5COneDrive%20-%20UCI%20Health%5CDocuments%5CProp%2056%20GME%20Grant%20RFP%5Cjkogocon%40ucop.edu)

##  E. Significant RFI Dates

|  |  |  |  |
| --- | --- | --- | --- |
|   | **Date**  | **Time**  | **Location**  |
| **RFI Issuance Date**  | Monday, July 25, 2022 | Noon, PST  | UCLA Procurement & Strategic Sourcing website [www.purchasing.uclahealth.org](http://www.purchasing.uclahealth.org/)  |
| **Bidders’ questions**  | Bidders can submit questionsuntil Friday, August 12, 2022 | 5:00 PM, PST | Via Email to jkogocon@ucop.edu |
| **Bidders’ submission of** **Proposals**  | Friday, August 19, 2022 | 5:00 PM, PST | Via Email to jkogocon@ucop.edu |

##  F. Proposal Acceptance Period

All proposals shall remain available for University acceptance for a period of one (1) year following the submission date.

##  G. Participating Locations

This RFI covers University of California Health. Any awarded Contract(s) shall be extended to any future UC locations as they may be announced during the term of an awarded Contract.

# II. Instructions for RFI Response

##  A. RFI Response

Bidders are required to send their proposals via email to Judy Kogut-O’Connell (jkogocon@ucop.edu)

In your proposal, please articulate:

* Bidder’s approach to executing such an engagement reflecting the requirements outlined in the RFI documents.
* Response needs to reflect the ability to meet the requirements listed above.

**Proprietary Information**

Any restrictions on the use of data contained in an RFI Response must be clearly stated in the response itself and marked as “Confidential”. Proprietary information submitted in response to this RFI will be handled in accordance with applicable University of California procurement regulations and the Public Records Act. All data and documentation become the property of the University.

**See Attachment “A” Excel file for additional requirements**