

## Questions and **Answers** for RFP 14-018

1. Under documents listed are the stand Office/Adobe document types for posting but:
  - a. Are these the only document types that will need the following capabilities? **All we are aware of right now.**
    - i. Posting
    - ii. Offline Downloading
    - iii. Offline Access
    - iv. Annotations (Highlighting, post-it notes...)
    - v. Collaborative editing
    - vi. Signature capture
2. Is offline document access required for mobile solutions? **Yes.**
3. Must the offline solution support drag and drop capabilities:
  - a. Required for PC/Laptop? **Yes.**
  - b. Required for mobile devices? **Yes.**
4. You indicate that there is a private till published capability. Does this indicate that there is a need for a document approval workflow? **No.**
5. Collaborative edit has a number of meanings.
  - a. Are you looking for a solution that would allow for multiple concurrent editors at the same time? **No.**
  - b. Would this solution need to allow users to see updates in real time: **Yes.**
  - c. Would this solution leverage collaborative editing via features like comments and/or Track Changes as used within Microsoft Office? **Yes.**
6. Do you have a default mail/calendaring system used by all board members? **No.**
7. Do you have a default mail/calendar client used by all board members? **Most use Outlook.**
8. What are your 24/7 support requirements?
  - a. Will end user help (How do I .....) be required 24/7? **Yes.**
  - b. Does 24/7 pertain to system support? **Yes.**
    - i. Problems with features not working as oppose to How to questions? **Yes.**
    - ii. Backup/Maintenance updates? **Yes.**
9. Will departed members content remain on the system as orphaned, but available, or will the content be re-assigned to a new member? **Yes for audit purposes.**
10. Will the capability to move from a SaaS to an internal solution be a requirement in the future? **No.**
11. What is the anticipated number of users?
  - a. Internal members count? **25**
  - b. External member count? **28**
12. Do you currently have an LDAP compliant user directory? **Yes.**
  - a. Does this directory contain internal & external users? **No.**
  - b. How is this directory maintained? **Internally.**
13. Is hosting provided by the client or third-party hosting provider? **Third-party hosted.**
14. If third-party, how will they connect to the system?
  - a. Will it be through VPN or remote access or will the system be a part of their network? **No.**
  - b. Will it need public access? **Secured public access.**
  - c. If it is not a part of their network what requirements do they have for firewall and security? **SOC II Type 2 Compliance.**
  - d. What type of connection speeds do they want for the system? (100mb, 1gb, more?) **100mb.**
15. What administration tasks are they wanting to handle and us handle? **For you to handle: Disaster recovery, back up, application support.**

16. They are requesting onsite and 1 on 1 admin/member training, how many hours of training are they wanting? **8 hours**
  - a. Do they want onsite support and for how long? **Two days.**
17. What incident management ticketing system are they using or the vendor providing this? **N/A**
18. Is the solution going to be added to their current monitoring system and if so what is that system? **Web services will be monitored.**
19. What are their expected service level metrics related to issue/incident management? **Do not know.**
20. What is the scope or expected requirements for the managed services solution and maintenance activities? We need to clarify/confirm which of the following will be included in scope:
  - a. System operation, administration and management **Yes.**
  - b. Infrastructure and Application Monitoring **Yes.**
  - c. Level 2 and 3 Incident Management **Yes.**
  - d. Proactive and reactive Capacity Management **Yes.**
  - e. Corrective, preventative, and perfective maintenance of applications **Yes.**
  - f. Corrective, preventative, and perfective maintenance for infrastructure **Yes.**
  - g. Disaster Recovery support services **Yes.**
21. What are the required/expected manage services coverage hours? **Monday - Friday; 7 a.m. – 10 p.m.**
22. What are the customer’s expectations for fully-staffed and on-call coverage hours during the week and weekend/holidays? **Available to answer questions and for client tech support.**
23. What is the anticipated number of users and bandwidth? **20 simultaneous users for up to a 400-page pdf. document.**
24. What is the anticipated response time? **Less than 5 seconds.**
25. On page 3 under *Electronic access to Board materials* and again on page 11 under *Exhibit A - Board Software Feature List*, the RFP calls out Agenda compilation (automatically). From what source will this Agenda Compilation come from? **Microsoft Office Suite and Adobe PDF.**
26. On page 3 under *Notifications*, the RFP says that meeting notices go to personal calendars. What formats need to be supported? Exchange, Google, etc.) **Exchange, Google.**
27. On Page 3 under *Board and RSA designated outside user collaboration capabilities* and again on page 11 under *Exhibit A - Board Software Feature List*, the RFP calls for voting/surveys/signature. Do you have any preference on what type of signature verification is preferred? **Ability to sign pdf based documents.**
28. General questions, how many board members will the system need to support? **28**
29. General questions, how many “outside users” will the system need to support? **25**
30. On page 11 under *Exhibit A - Board Software Features List*, the RFP calls for hand written notes. We assume these are handwritten notes that are scanned in and uploaded as a PDF, is this correct? If not, please clarify. **No. Using a stylist to make notes on the iPad.**
31. On page 11 under *Exhibit A - Board Software Features List*, the RFP calls for the application to Facilitate finding common meeting availability. Please provide more detail information about this feature. **Correspondence to board members on selecting meeting dates.**