

ADDENDUM NO. 2

**Kansas City Area Transportation Authority
1350 E. 17th Street
Kansas City, Missouri 64108**

**KCATA ELECTRONIC RECORDS MANAGEMENT SOFTWARE &
IMPLEMENTATION SERVICES
Request for Proposals #G19-7055-21B**

Issue Date: August 22, 2019

This Addendum is hereby made a part of the Request for Proposals and Project Documents to the same extent as if it was originally included therein and is intended to modify and/or interpret the RFP documents by additions, deletions, clarifications or corrections. The Contractor shall acknowledge in the proposal the receipt of this Addendum.

REQUEST FOR CLARIFICATIONS

1. For Proponent Qualifications to establish KCATA's records management program, what credentials are desired/required: CRM (Certified Records Manager), IGP (Information Governance Professional), etc.?
A. CRM is desired
2. Is KCATA looking for a high-level Records Management Policy only or additional policies and procedures that address legal holds, defensible deletion/disposition, business continuity/disaster recovery, public records requests, and similar?
A. Additional policies
3. Would you provide a high-level organizational chart for the Authority, to facilitate discovery/assessment scoping?
A. Yes
4. Timeline: is there a target date for the full production rollout of the ERM system based on other planned initiatives for the organization?
A. 1/1/21
5. The pricing page asks for 250 users. In the vendor meeting, it was discussed that not all users would require "full user licenses". Can you please confirm how you would like user licenses priced out on the pricing page?
 - o 250 full user licenses? (i.e. all 250 people would have capabilities to read, edit, upload documents, changing metadata, etc.)
 - o Search and read only licenses - There are also license options for users to be able to only search and view documents but cannot edit.**A. 150 Full and 100 search and read only**

6. Do you require any external users to have access to the system such as vendors or external council? If so, please explain.
- A. Yes, we have a limited need for TPA to access documents related to contested matters. Accidents and Workers compensation.
7. Do you anticipate the need to automate workflows as part of the initial implementation? Yes If so, can you please list the departments that would be a part of this and detail the current processes you desire to have streamlined? Or is this something that you would like to have included with a discovery and recommendations by the chosen vendor?
- A. HR, (Legal, includes Risk, Labor Relations) IT, Finance, Procurement, Transportation, Planning and Facilities.
8. Can you please detail some specifics of how you would like the system to initially be implemented and configured so all vendors can price similar implementations? It would be helpful to know:
- What departments do you want to set up and configure to store their documents in the initial deployment?

A. Phase I - HR, (Legal, includes Risk, Labor Relations) IT, Finance, Procurement. Phase II - Transportation, Planning and Facilities.
 - Please list the document types each department will store in the system or provide an estimate of how many documents types each department will need? (i.e. Accounting: Invoices, POs, receipts, financial statements, etc. or we estimate 16 document types for Accounting)

A. Each of the Phase I departments on average will have about 20 different types of documents.