

August 11, 2023

**RFP 22-3970 – Legal Matters Management Software Solution**

**ADDENDUM #2**  
**(Acknowledgment is Required)**

The Respondent shall acknowledge its review and receipt of this Addendum by signing below and including a signed copy of this Addendum with its bid submittal, or as stated in Section 4.1, Basis for Award of Agreement of the RFB. Failure to do so could result in disqualification of the bid.

Please note that underlined information (*example*) is added wording and stricken information (~~*example*~~) is deleted wording.

---

**I. CLARIFICATIONS:**

- 1. The Due Date has been changed from August 15, 2023 to August 29, 2023, at 2 P.M. local time.**

**II. QUESTIONS AND ANSWERS:**

- 1. Question: Can you provide size of data to migrate?**

Answer: The documents database will remain in Filestream and the associated metadata is approximately 1 MB in size. Note that the metadata will be needed to migrate; however, the documents will be held on-premise.

- 2. Question: Can you provide number of documents?**

Answer: The documents database will remain in Filestream and the number of files is greater than 10,000 for the purposes of incorporating metadata into the system.

- 3. Question: Can you provide number of matters (5000?) + active 150 matters?**

Answer: As of the date of this addendum, the number of closed and archived matters is 5,335 and the number of active matters is approximately 150.

- 4. Question: Is IT support available to do metadata extraction and document extraction?**

Answer: Yes, there will be IT staff available to assist with support and data extraction.

**5. Question: Even if our solution already offers a strong and secure data repository, is it mandatory to integrate with FileStream? If yes, what is your version of FileStream? Is your FileStream personalized? Could we have access to a FileStream specialist at SFWMD?**

Answer: The District can review proposed integrations and it is not mandatory. However, it is preferred that the solution directly integrates with Filestream for records management requirements. The current version of Filestream is SQL Server 2019. Microsoft does not allow anyone to modify Filestream schema and the District is not aware of any personalization that has occurred. There will be IT staff available to assist with Filestream integration.

**6. Question: What is your back-end system?**

Answer: The District's documents are housed on a SQL Server, using Filetables, and built on Filestream technology.

**7. Question: What kind of integration are you looking for your back-end system? – See 3.6**

Answer: Although this is one option for integration, the District can provide the metadata link to the on-premise documents through Filestream, which can be integrated into the respondent's system.

**8. Question: It is mentioned that we need to complete and make signed the PUBLIC ENTITY CRIMES STATEMENT in the presence of a Notary Public or other officer authorized to administer oaths. Do you accept to have this document completed in Canada from of a Canadian Lawyer as our offices are located in Montreal?**

Answer: According to our Legal team, yes the documents can be signed and notarized by a Canadian lawyer.

**9. Question: In case Legal Suite could be short listed, is it possible to book a demo in a morning between these dates: 28 or 31 August or after September 11.**

Answer: Any respondent that is short listed will be given a list of dates and times that the District has delegated for demonstrations based on District staff availability.

- 10. Question: Whether companies from Outside USA can apply for this? (like, from India or Canada)**  
Answer: As a minimum requirement, all data must be housed in the USA and support hours must overlap the District's regular working hours. Additionally, software used in proposed products cannot have been developed in countries with active state-sponsored campaigns such as China, Iran, Russia, and North Korea.
- 11. Question: Whether we need to come over there for meetings?**  
Answer: Meetings do not need to take place in person. The District supports using Microsoft Teams for calls and meetings.
- 12. Question: Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)**  
Answer: As a minimum requirement, all data must be housed in the USA and support hours must overlap the District's regular working hours. Additionally, software used in proposed products cannot have been developed in countries with active state-sponsored campaigns such as China, Iran, Russia, and North Korea.
- 13. Question: Can we submit the proposals via email?**  
Answer: No, all proposals must be submitted through DemandStar. Faxes, emails, or hand delivery will not be accepted.
- 14. Question: Can a more detailed use case be given as to the 100 district staff that need access to the system that are outside of the OGC staff?**  
Answer: There are 16 OGC staff and the rest of the up to 100 staff are manager and higher-level staff. If proposed, the other staff would potentially use a request portal for review of matters or contracts.
- 15. Question: Our solution is a browser based COTS solution that incorporates both matter and document management. Our solution can be installed on premise or in the cloud with vendors such as Azure, AWS etc. selected and controlled by the department. Is either of these deployment models acceptable or is the Department looking for a vendor hosted solution?**  
Answer: The District prefers cloud based solutions and vendors such as Microsoft Azure and AWS are acceptable.

**16. Question:** Our solution provides built in document management software that integrates directly with Office and Acrobat that in the end centralizes all data, calendar, email and documents in a central place for each matter. Is this acceptable or are you requiring the vendor to utilize or build a custom integration with Filestream for filegroup even if the document management features already exist?

Answer: The District prefers a cloud based solution that integrates with Filestream. If the proposed solution cannot integrate with Filestream, the District will require review of the respondent's security documentation.

**17. Question:** For data migration what are the sources of data that your current data and historical data is in? Can more information be provided as to what the fields of data are and what the source of the data is to help determine the scope of conversion.

Answer: For the purposes of metadata migration, a .csv file will be provided that clearly states the field titles. Some examples of these titles include: name, description, project name, permit number, case number, assigned staff name, date file opened, date file closed, and status.

Celeste Larisey  
Procurement Specialist  
cc: Project Manager

ACKNOWLEDGEMENT OF ADDENDUM #2

BY: \_\_\_\_\_ DATE

\_\_\_\_\_  
(TYPE/PRINT NAME AND TITLE)

\_\_\_\_\_  
COMPANY NAME

End of Addendum #2 for RFP 22-3970