

Justin S. Greene
Commissioner, District 1

Lisa Cacari Stone
Commissioner, District 2

Camilla Bustamante
Commissioner, District 3



Adam Fulton Johnson
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Gregory S. Shaffer
County Manager

July 23, 2026

SANTA FE COUNTY
RFP No. 2026-0391-CMO
Agenda, Meeting and Document Management Software
ADDENDUM NO. 1

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No.1. This documentation shall become permanent and made part of the departmental files.

Attachment A: Pre-Proposal Agenda and Sign-In Sheet

Clarification No. 1: Software solution must be made available in English and Spanish.

Questions and Answers

Question No. 1: Section 3.e references compliance with ADA accessibility requirements and WCAG 2.1 Level AA standards for public-facing content. Can you clarify whether this requirement applies only to the public agenda portal itself, or whether the County also expects the published agenda packet PDF and all content contained within it to meet those accessibility requirements?

Answer No. 1: The accessibility requirements apply to the public-facing agenda management platform and any content generated or published by the software under the contractor's control. The County recognizes that agenda packet documents are prepared and uploaded by County staff or originating departments. Accordingly, the contractor is expected to support the publications of accessible documents and preserve the accessibility of content created by third parties. The County will remain responsible for the accessibility of documents it prepares and uploads.

Question No. 2: Can the County provide an estimate of the volume of historical records to be migrated (number of meetings, years of history, number of PDF's/videos files)?

Answer No. 2: The County anticipates migrating approximately 6 years of historical meeting records for multiple boards and commissions. Historical content includes meeting agendas, agenda packets (primarily PDF documents), minutes, supporting attachments, and less than one year of video recordings. The County estimates that the migration will include several thousand meeting records and associated

documents. Because records vary by board meeting type, exact quantities of meetings, documents, and video files cannot be guaranteed. Proposers should base their proposals on migrating all available historical records, with the understanding that the final scope will be confirmed during contract negotiations and implementation.

Question No. 3: Does the County have a target implementation timeline or desired go-live date following contract award?

Answer No. 3: The County's goal is to complete implementation and begin using the new agenda management system as soon as practicable following contract award. The proposed implementation schedule, including data migration, configuration, testing, training, and go-live will be developed collaboratively with the selected contractor during contract negotiations and project kickoff.

Proposers should include a recommended implementation timeline in their proposals and identify any assumptions, dependencies, or resource requirements that may affect the schedule.

Question No. 4: Has the County established an anticipated budget for this project?

Answer No. 4: The County has budget for purchase and implementation; however, a specific amount is unknown. Costs will be negotiable with the selected Offeror.

Question No. 5: Evaluation Factor 2 (§V.B.2) asks Offerors to address compatibility with Microsoft 365 and "any other County enterprise systems," Does the County use Microsoft 365, and are there other systems (ERP, financial, records management, HRIS, or Chambers A/V production/ voting hardware) the solution should integrate with at go-live?

Answer No. 5: The County currently uses Microsoft 365. We are also in the initial implementation of a new Enterprise Resource Planning (ERP) system for financial, records management, HRIS, and other systems. The main hub of the new ERP will be Workday, Avaap, OpenGov, OneSource, CanAm, and Sprypoint,

Question No.6: Scope of Work §4. d requests the ability to "back up all records locally," while §1. e requires a SaaS solution with no County-hosted servers. Can the County clarify what "local backup" means (what technology is in place for local system of record) in this context?

Answer No. 6: The County's intent to ensure that it can maintain independent copies of its records and is **not** requiring an on-premises or County-hosted backup system. The proposed solution shall be a cloud-based Software-as-a-Service (SaaS) platform. The system should provide the ability to export and retain County records, including agendas, agenda packets, minutes, attachments, metadata, and other associated records, in standard, non-proprietary formats for archival, business continuity, or records management purposes. Offerors may describe the export, backup, and disaster recovery capabilities of their proposed solution.

Question No.7: How many years of historical agendas, minutes and recordings must be migrated from the County's current Diligent Community environment, what is the approximate total data volume, and in what format(s) is the data currently stored?

Answer No. 7: See response to Question No.2 above.

Question No.8: Does the County require a persistent test/training environment maintained after go-live (for ongoing staff training and testing future releases), or only during implementation?

Answer No. 8: The County prefers a persistent non-production test/training environment that remains available after go-live for ongoing staff training, workflow testing, configuration changes, and evaluation of future software releases. However, if a persistent environment is not included as part of the standard

offering, Offerors should describe the availability of temporary or on-demand testing environments, any associated costs and any limitations.

Question No.9: Since you're using Diligent Community, do you use their approval routing capabilities, and can the county share the existing and/or desired approval routing sequence definitions so that we can better understand the simplicity or complexity of your routing requirements (by role? By department? By type of item, etc.)

Answer No. 9: At this stage of the procurement, the County will not provide its existing approval routing sequence or workflow definitions, as the sequence may change with the new ERP system implementation. More detailed information regarding the County's approval routing and business processes will be shared with the shortlisted Offerors, as appropriate.

Question No.10: Although not required by the RFP, would the County have interest in multilingual portal or agenda support (e.g. Spanish), should that be available as an optional feature?

Answer No. 10: By this Addendum 1 the proposed system must be made available in both English and Spanish. If a proposed solution can offer additional multilingual portal or agenda capabilities beyond those requirements, Offerors are encouraged to describe those features as optional functionality in their proposals.

Question No.11: Per the RFP, the contents of the proposal are limited to a maximum of 20 pages, excluding only certificates and licenses. Could the County please clarify whether the following are excluded from the proposal page count: required appendix responses, Cover pages and Section divider pages used for organizational purposes. If these items are included in the 20-page limit, would the County consider increasing the maximum proposal length to 25 pages to allow vendors to provide complete responses to all requested sections?

Answer No. 11: Appendix responses, cover pages and Section divider pages are excluded from the 20-page limit and will not be counted. The 20-page limit applies only to the Offeror's narrative response to the evaluation criteria and evaluation factors in the RFP.

Question No.12: On page 6, Item 1 (c), the RFP states that the solution must be "customizable to Santa Fe County business processes and operational needs." Could the County provide additional details regarding which business processes or operational needs they expect the solution to accommodate and the level of customization they envision?

Answer No. 12: The County intends this requirement to refer to the solution's ability to accommodate the County's operational workflows, user roles, approval processes, meeting management practices, document management, public meeting requirements, and other business processes associated with administering agendas and meetings for multiple boards and commissions. The County is seeking a configurable solution that can be adapted to its operational needs primarily through system configuration rather than custom software development. Offerors should describe the configurability and flexibility of their proposed solution, including any limitations.

Question No.13: Will Santa Fe County consider a custom-developed, cloud-hosted SaaS solution that meets all mandatory functional, security, migration, implementation, hosting, support and service-level requirements?

Answer No. 13: Yes. The County will consider a custom-developed, cloud-hosted Software-as-a-Service (SaaS) solution, provided it satisfies all applicable, functional, technical, security, hosting, implementation, migration, support, maintenance and other requirements set forth in the RFP.

Question No. 14: If so, may the requirement for three current governmental references using the proposed software in production be satisfied through references for comparable custom-developed government software systems implemented and supported by the Offeror?

Answer No. 14: Yes. If proposing a custom-developed solution, the required references may consist of governmental clients for whom the Offeror has successfully implemented and supported comparable custom-developed software systems. References should demonstrate the Offeror's experience delivering solutions of similar scope, complexity and functionality to the system proposed for Santa Fe County.

Question No. 15: May a working prototype or substantially complete demonstration environment be used for the finalist software demonstration?

Answer No. 15: Yes. The County will provide more specific demonstration requirements to the finalists. The County expects a live demonstration of the proposed solution that accurately reflects functionality and capabilities being offered. If a demonstration environment is used, Offerors should clearly identify any functionality that is not yet fully implemented or available.

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to John Anthony Peperas, Procurement Specialist Senior at jpeperas@santafecountynm.gov



PRE-PROPOSAL CONFERENCE
RFP No. 2026-0391-CMO
Agenda, Meeting and Document Management Software
July 14, 2026, at 10:00AM

Contracting Agency: Santa Fe County

- | | | |
|----------------------------|-------------------------------|---------------------|
| • John Anthony Peperas | Procurement Specialist Senior | Purchasing Division |
| • Sara Smith | Operations Manager | Manager's Division |
| • Bill Taylor | Procurement Manager | Purchasing Division |
| • Amanda Patterson-Sanchez | Procurement Planner Analyst | Purchasing Division |

Project Information

Santa Fe County Manager's Office (CMO) and the Information Technology (IT) Division seek proposals for a secure, cloud-based agenda, meeting and document management software solution to support the creation, routing, approval, tracking, publication, and archival of agenda items and related documents for public meetings, boards, commissions, committees, and internal meetings.

The solution shall support efficient workflow management, records management and retention, public transparency, meeting administration, and public access to agendas, minutes, supporting materials, and archived records while providing flexibility to meet Santa Fe County's current and future operational needs.

Proposal Information

- Carefully read the Request for Proposal for requirements, terms & conditions including the sample contract.
- Sequence of Events are listed on page 11.
- Proposal Organization – Proposal should be organized as outlined in the RFP on page 21.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 23-24) will be scored by a three to four-member evaluation committee.
- Preferences -

1) N.M. In-State Resident/Native American In-State Preference Certificate 80 points total of all evaluation factors added to score.

OR

2) N.M. Resident/Native American Veterans Preference Certificate, 100 points total of all evaluation factors added to score or Native American Preference. For more information on State Preference visit www.tax.newmexico.gov

AND

3) Santa Fe County Preference, 50 points total of all evaluation factors added to score. For more information on County Preference visit <https://www.santafecountynm.gov/finance/purchasing-division/current-bid-solicitations>

ATTACHMENT A

- Please submit all questions via email to John Peperas at jpeperas@santafecountynm.gov. The last day for questions will be **Thursday, July 16, 2026**. (*Any contact with any other County staff member or persons other than the Procurement Specialist Senior may be grounds for disqualification.*)
- Addendum will be issued on **Friday, July 24, 2026**. (*Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.*)
- **Proposal Submittal Due Date:**
 - Due Date: Friday, August 7, 2026**
 - Time: 2:00 PM**
 - Electronic submission via Dropbox utilizing Dropbox link:**
<https://www.dropbox.com/request/4gbxn0nzy3ujdpio7v8z>



SANTA FE COUNTY

**PRE-PROPOSAL CONFERENCE
RFP No. 2026-0391-CMO/JP
Agenda, Meeting and Document
Management Software
July 14, 2026 at 10:00 AM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
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Bill Taylor	SFC Purchasing	505-986-6373	wtaylor@santafecountynm.gov
Sara Smith	SFC County Manager's Office	505-992-1635	ssmith@santafecountynm.gov
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Brian Johnson	Kofile		Brian.Johnson @kofile.com