# Proposer Attachment 1: Proposer Form Submission

## Executive Summary

The executive summary should be limited to a brief narrative not to exceed two (2) pages describing the Proposal. The Proposer’s background including a brief description (*e.g*., past history, present status, future plans, company size, etc.) and organization charts, should be included. The summary should contain as little technical language as possible and should be oriented toward non-technical personnel. The executive summary should not include cost quotations.

## Proposer’s Experience and Past Performance

Proposers must provide information about their company so that the District can evaluate the Proposer's stability and ability to fulfill the commitments set forth in its Proposal.

1. If the Proposer is intending to use subcontractors on this Project, please provide a separate response using the Company Background Form detailed below for each subcontractor. Please describe the relationship with that subcontractor and the specific services and/or products they will be providing for the Project. A complete list of subcontractors is required. Client has the right to approve all subcontractors of the Proposer at any time.

| Company Background Form | |
| --- | --- |
| Proposer name |  |
| Is Proposer the prime contractor | Yes  No  |
| Proposer website |  |
| Name of parent company (if applicable) |  |
| Headquarters location |  |
| Number of field offices and nearest field office to Client |  |
| Date business was established |  |
| Describe any mergers or acquisitions completed by your company within the last three years. |  |
| Software Profile | |
| Name and version of proposed software solution(s) |  |
| Date of next major version release and typical release schedule |  |
| Software version proposed (years in production): |  |

1. What strategic alliance(s) have you made to further strengthen your product and services?
2. How many public sector customer installations of the version proposed are currently in production?

|  |  |  |
| --- | --- | --- |
|  | Number of customers on version proposed | Total number of customers in a production environment |
| Human Resources (HRIS) |  |  |
| Payroll |  |  |
| Time and Attendance |  |  |
| Benefits Management |  |  |
| Performance Management |  |  |
| Recruiting |  |  |
| Learning Management |  |  |

1. What is the Proposer’s hourly rate for implementation assistance beyond that which is included in the Proposal by skill set area?

|  |  |
| --- | --- |
| Rates for Additional Implementation Assistance | |
| Skill Set | Hourly Rate |
|  | $ / hr. |
|  | $ / hr. |
|  | $ / hr. |

## Application Software

1. Describe unique aspects of the Proposer's solution in the marketplace. What specifically differentiates your solution(s) from the competition.
2. Describe all third-party products proposed that are integrated with the Proposer’s solution and provide the following for each product:

|  |  |  |  |
| --- | --- | --- | --- |
| 3rd Party Product | Real Time or Batch Data Flows? | How Does Your Team Natively Support Interfaces? | Reason for proposing third-party solution instead of proposer solution. |
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1. Please describe your licensing model for all solutions proposed. What levels of licenses are available for users? Do system administrators need a separate user license for administrator access?
2. Is 100% of your product’s functionality available through a browser-based interface? If not, describe the components that are not browser-accessible.

## Data Management Architecture

1. Describe your system’s database architecture(s) and database management system(s), and if a commercial database(s) is used (e.g., Oracle, DB2, SQL-Server, etc.).
2. Describe your approach and direction to integration across all system modules. Explain if any of your proposed modules are not fully integrated with your solution (e.g. separate database is maintained for a module / functional area).
3. What tools and approaches (e.g., APIs, middleware, IaaS connectors, etc.) do you employ to facilitate information exchange for interfaces between your system and others? What file formats are supported for importing or exporting data?
4. Describe what, if any, footprint (e.g. local software artifacts such as DLLs) exists on the user’s client applications (e.g. desktop, browser, etc.).

## Security and Audit Capabilities

1. Describe the identification and authorization capabilities of your proposed solution for users.
2. Describe how your system interfaces with Active Directory for user authentication.
3. Describe the security audit capabilities of your proposed solution.
4. What functions does your proposed system have to protect the privacy of information designated “private” (e.g. personally identifiable, SSN, credit card, ACH, HIPAA, etc.) that it processes or stores?
5. What is your process for notifying the customer and fixing bugs once they have been identified?
6. Describe your systems security administration/management capabilities including: monitoring of performance measures, intrusion detection, and error resolution.
7. Provide all peripheral technical specifications in support of solution proposed such as desktops, printers, and other peripheral devices.

## Proposer Hosted Questions

1. Describe your Proposer-hosted model, including: hosting, integration, user support help desk, account provisioning, and deployment model (Multi-tenant or Single tenant, are multiple customers’ data stored in the same tables or on the same hardware?).
2. Will your company host the solution or will hosting services be managed by a third party?
3. Where are the data center and storage facilities? Describe the security measures in place and list any certifications that prove compliance with industry security protocols.
4. Describe your logical security of your hosted environment, including: firewall security, authentication controls, and data encryption capabilities (including data at rest and data in transit).
5. How much notification will you give the District in advance of any scheduled downtime?
6. Describe the disaster recovery site and methodology used to maintain availability.
7. Describe the back-up process. How often are back-ups made and stored?
8. System response time must not impede the ability for departmental staff to perform their required job functions using the system. What are your guarantees on system performance?
9. What are your guaranteed uptime metrics? Will you guarantee a system uptime of at least 99.9%, except for planned/scheduled downtime?
10. How frequently will planned/scheduled downtime occur and what is the typical length, day, and time of day for planned downtime?
11. Will you provide a copy of your most recent SSAE 18 Audit, if requested?

1. Based on information provided in this solicitation and experience in working with other large municipal entities, what is the Proposer's perspective on the most significant risks to this Project and how do you plan to mitigate these risks?
2. How will a clear delineation of project management responsibilities between Client and the Proposer be managed and represented?

## Configuration vs. Customization

1. How does the Proposer define customization versus configuration?
2. How can District configure the software directly without Proposer involvement?
3. How are configurations maintained when installing new releases of the Proposer’s software?

## Conversions, Interfaces, and Reporting

It is expected that information generally would need to be entered only once into the system. Modules or components within the system should be integrated in real-time with each other such that batch processes are not required to transfer information from one area of the system to another unless that is the preference of the District. Existing District interfaces between core modules that may currently exist or shadow systems that will likely be replaced are not included as they are assumed to be included in an integrated Enterprise Application Solution.

Proposers are asked to review the conversions and interfaces represented in Attachment #3: Pricing Proposal to familiarize their teams with the scope of services requested for desired Client application interfaces and data conversions from replacement systems. Provide pricing for interfaces in the associated Proposer Attachment 3 – Pricing Proposal.

1. Describe your approach towards interfacing and integration with other solutions including use of specific tools, methods and standards.
2. As it pertains to Client’s current technical environment described previously, identify potential issues for integrating with specific technologies that are used within Client.
3. Describe your integrated report writing capabilities. Describe skillsets needed to successfully use these capabilities.
4. Discuss the proposer’s standard approach to data conversion and the import of source data into the proposer’s data structure.
5. Describe and represent proposer tools to support user acceptance testing for configurations, data conversions, and identified system interfaces.
6. Explain how acceptance sign-off will be performed on configurations, interfaces, user acceptance testing, and final system acceptance.
7. Describe the degree to which proposer staff are available to support testing on-site to assist in triaging potential issues resulting from revisited configurations or data anomalies, and staff retraining.

## Training and Knowledge Transfer

Proposer should describe their process for ensuring that a transfer of knowledge occurs back to Client staff such that staff is capable of supporting and maintaining the application in the most proficient manner once the Proposer implementation engagement is complete. Proposer shall complete Proposer Attachment 4 – Implementation Staffing Resources to detail these hours.

Client intends to explore the advantages, disadvantages and related costs of end-user implementation training approach:

1. End User Training Approach:  All end-user and technical training will be performed on-site through implementation and be performed by the Proposer.
   1. End user implementation training will be provided by the Proposer and include joint participation by the relevant Client process owner team lead supporting the process area in the new software system.
   2. Technical Implementation training will include training for Client IT staff on the technologies required to support the new ENTERPRISE APPLICATION system.

Proposers must list the nature, level, and amount of training to be provided for in each of the following areas:

* Technical staff: business analysts, security staff, system administrators, etc.
* Core users and functional leads in process owning departments
* Decentralized end-users
* Executive level staff who need to understand how to review/approve workflows and extract information from the system
* Help desk support staff
* Staff responsible for user permissions and workflow development and maintenance
* Other staff (e.g., executive level administrative staff)

1. What is your recommended approach to training for Client and why? Detail the types of training to be provided (classroom, online, etc.) and how staff can be capable of supporting and maintaining the application once the implementation is complete.
2. Detail the foundational skills that will be required to support your solution. Include any required or suggested outside training that may be required.
3. What types of documentation and training material will be provided to Client? How will this material be made available to users? Describe the opportunities for ongoing training post-implementation.

## Client References

The Proposer must provide at least three (3) references from clients that are similar in size and complexity to Client. The references provided should be fully deployed in production. Proposers are encouraged to provide more than the minimum number of references. These references should be the same deployment model as proposed for the District. Proposer’s shall complete a separate Proposer reference form for each client reference. Proposers that are partnering with a third party are strongly encouraged to include references that are relevant for the prime and sub-contracts; however separate references are acceptable.

In addition, Client requests a listing of all current public-sector clients with the year the client became a customer. Please include this client list immediately following the reference form template.

|  |  |
| --- | --- |
| Proposer name: |  |
| Customer name: |  |
| Customer contact: |  |
| Customer phone number: | ( ) |
| Customer E-mail address |  |
| System which solution replaced |  |
| Customer go-live year: |  |
| Detail the solution(s) and modules in the reference’s production environment that match those in-scope for this RFP: | |  |  |  | | --- | --- | --- | |  | Is reference using this module of your software? | Deployment method (on-premise or hosted) of module | | Benefits Management |  |  | | Payroll |  |  | | Time and Attendance |  |  | | Core HRIS |  |  | | Leave / Scheduling Management |  |  | | Performance Management |  |  | | Recruitment |  |  | | Learning Management |  |  | |
| Describe nature of project and services provided to this client: |  | |

## Proposer Exceptions and Deviations

If the Proposer finds it impossible or impractical to adhere to any portion of the RFP including the Scope of Services, Proposer Response Requirements, Evaluation Process, Terms and Conditions, and/or requested details in the Proposal package (including all attachments), it shall be stated in the table below.

Objections or deviations expressed elsewhere in the Proposal, either directly or by implication, will not be accepted as deviations, and in submitting a Proposal, Proposer accepts this stipulation without recourse.

|  |  |  |
| --- | --- | --- |
| Exception Explanations | | |
| # | Title | Detailed Explanation of Exception |
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