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**Town of Pembroke Park, FL**

**Request for Proposal**

**for the**

**ERP System Selection RFP 20180625**



**Issue Date: June 25, 2018**  
**Closing Date: July 31, 2018**

**Pre-Proposal Meeting (Non-Mandatory): July 9, 2018**

**3150 SW 52nd Avenue  
Pembroke Park, FL 33023**

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## 1 Introduction

### 1.1 Overview

The Town of Pembroke Park, FL is interested in soliciting proposals from qualified providers of municipal software whose product offering meets or exceeds current Town requirements and whose complete product offering provides a robust solution set that will allow the Town to continue to leverage this investment well into the future as the needs of the Town grow and evolve.

#### Definitions

The following definitions are used in the RFP:

- **Client or Town** means the Town of Pembroke Park, FL
- **Plante & Moran, PLLC**: The Town's consultant and co-project manager for the project.
- **Vendor or Proposer** means a firm, company or organization submitting a proposal in response to this RFP.
- **ERP, ERP System Selection Project**, the system or software means the software solution that the successful Vendor responding to this RFP will be responsible for providing

### 1.2 Town Background

Town is a political subdivision of the State of Florida and is located in the southeastern part of the State in Broward County. Town was first incorporated December 10, 1957 as Town of Pembroke, and later incorporated as Town of Pembroke Park on June 20, 1959. Town has a current estimated permanent population of 6,100 residents with a large influx of seasonal residents each winter. Town has a total area of 1.7 square miles.

Town is governed by a five member Town Commission. The administrative duties are conducted under the authority of a Town Manager with the assistance of an Administrative Services Director and Public Services Director. Individual department heads are in charge of the Building, Finance and Budget, Code Enforcement, Public Works, Engineering, and Parks and Recreation departments.

**1.3 Current Application Environment**

<b>*Legend for Current Applications</b>		
<b>Legend Code</b>		<b>Description</b>
R	Replacement	The Town is intending on replacing this application with the selected solution.
C	Consider	The Town is considering replacing this application with the selected solution, based on the strength of the finalist Vendor offering and cost / benefit of the replacement module
M	Maintain	The Town is intending on retaining the application, not replacing it thru this effort
I	Interface	The Town is intending on keeping the application and interfacing/integrating it with the selected solution.

<b>Current ERP Application</b>	<b>Application Notes/Description</b>	<b>Likely Future?*</b>
Inkforce	Used by the Town for community development functionality (code enforcement, permitting, etc.), including cash receipting	R
PayEZ	Online payment portal	R
Imageflow	Document search	R
FTR	Commission meeting audio and transcript tracking	R
PayClock	Timeclock software	R
AutoCAD	Mapping software	M
HOBOWare	Device monitoring software (to monitor lake levels)	I
Denali	Financial and payroll functionality	R
CMI Fixed Assets	Fixed Asset tracking and depreciation	R
Aatrix	Payroll reporting software	R

**1.4 Current Technical Environment**

The Town has established technology standards and would prefer to adhere to them as part of the implementation of the ERP System Selection Project. The tables below provide Vendors with a current summary of the Town’s network and computing environments, and standards.

As part of the proposal process Vendors will be required to submit significant technical detail about the proposed solution detailed in section 3.4 of this RFP. In preparing responses, Vendors must remain diligent in referencing this table to assure that responses clearly identify:

- Areas of known or potential conflict between the Vendors proposed solution and the Town’s defined environments
- Recommendations of how best to implement and operate the proposed solution within the Town’s defined environments

**1.4.1 Summary of Network and Computing Environment**

<b>Network Infrastructure Configuration (WAN &amp; Internet)</b>
The network consists of a single site with a 10 Mbps symmetrical Internet connection and enterprise firewall.
<b>Data Center</b>
The data center facility is located at the Town’s primary office location and with dedicated air conditioning and basic fire detection & suppression mechanisms.
<b>Data Network</b>
A wired network exists at the Town’s primary office location. There is also 802.11 b/g/n wireless connectivity with only limited coverage in certain portions of the building.
<b>Server &amp; Operating System Standard</b>
The server environment consist of traditional standalone systems and is a mixture of current and legacy versions of Microsoft Windows Server operating system. No server virtualization is currently used.
<b>Storage &amp; Backup Environment</b>
Backups are achieved using a Barracuda backup appliance. Local backups are completed on a daily basis and replicated offsite to cloud-based storage.
<b>DRP/BCP Environment</b>
There is no separate disaster recovery environment. Backups are replicated to the cloud on a routine basis and serve as the primary means to recover the environment in the event of a disaster. Data is generally retained for a period of 1 year.
<b>Workstation Standard</b>
All of the Town’s workstations use a mixture of Microsoft Windows 10, 8, and 7 versions and are manufactured by Dell, there 25 desktops in the environment. There are also a small number of laptops and tablets also manufactured by Dell.
<b>Web Browser Standard</b>
A variety of web browsers are used in the environment including Microsoft Internet Explorer, Mozilla Firefox and Google Chrome.
<b>Current ERP Systems</b>
See Section 1.3 – Current Application Environment

Staffing
The technology environment is supported by a combination of Town IT staff and external vendors. The Town’s servers are supported by an external vendor.

**1.4.2 Town Technical Standards**

Technical Standards	
Backup solution	Barracuda Networks
Desktop hardware	Dell
Desktop operating system	Microsoft Windows
Email system	Microsoft Exchange Server
Firewall	SonicWall
Geographic information system (GIS)	AutoCAD
Internet browser	Various
Proxy server	None
Relational databases	Microsoft SQL Server
Remote access	VPN
Report writer	Crystal Reports
Server hardware	Dell
Server operating system	Microsoft Windows
Server virtualization	None
User authentication	Active Directory
Virus scanning software	Avast Cloud

**1.5 Other Planned Technology Initiatives**

Project Description		Timing
1	Office365 migration	2019-2020
2	Text archiving system (for town-owned mobile phones)	2019
3	Upgrade of Town internet connection	2019
4	Upgrade of phone system with redundancy	2019

## 1.6 Expected Scope of System Solution

The Town is requiring that responding vendors propose a complete ERP solution, including software, hardware specifications, project management, and other technology services for the entire scope of the project that may or may not include components owned by the vendor.

An outline of the required software system solution has been provided as follows:

### Software:

- Accounts Payable
- Bank Reconciliation
- Budgeting
- Business Tax Receipts
- Cash Receipting
- Contract Management
- Document Management
- Fixed Assets
- General and Technical
- General Ledger
- Human Resources
- Code Enforcement
- Inventory Management
- Miscellaneous Billing & Accounts Receivable
- Parks and Recreation
- Payroll
- Permits and Inspections
- Planning and Zoning
- Project and Grant Accounting
- Purchasing
- Time and Attendance
- Treasury Management
- Work Order and Asset Management
- Any other necessary software components to support the proposed Core Application Software solution

### Services:

- Project Management
- Hardware design and installation consulting
- Software Installation
- Data Conversion
- Report Development
- Integration and Interface Development
- Software Modifications
- Implementation and Training Services
- Change Management
- Knowledge Transfer to Staff
- System Documentation Development
- Operational Redesign Assistance
- Ongoing Support and Maintenance Services
- Ongoing Hosting Services



- GIS Configuration and Hosting Services (Additional information in section 3.6.6)
  - Vendors proposing only GIS services may submit a separate proposal in the format of their choice to the Town contact

**It is important to note that the Town is only considering a Vendor-hosted solution.**

Additional details and descriptions related to the specifics of the expected scope can be found in section 3 – Proposal Response Format.

**1.7 Summary of Key Transaction Volumes**

A summary of key transaction and operating volumes and standards is included below. These volumes and standards reflect actual & estimated amounts for the current environment.

Operating Volumes/Standards	
Town of Pembroke Park, FL	
Population	6,300
Form of Government	Commission
Jurisdictional Area (Square Miles)	1.6 mi <sup>2</sup>
Residential Units	923
Number of Departments	9
Budget (All Funds)	11,500,000
Total Staff	38
Number of IT users	1
Number of ERP System Users (Total Current)	12
Number of ERP System Users (Anticipated Future)	38
Number of Maximum Concurrent ERP System Users (Future)	38
General Ledger/Bank Reconciliation	
Chart of Accounts Structure	-
Chart Segment One Name/Account Mask	Fund/XXX
Chart Segment Two Name/Account Mask	Department/XXXXXX
Chart Segment Three Name/Account Mask	Account/XXXXXX
Chart Segment Four Name/Account Mask	Un-named/XX
Chart Segment Five Name/Account Mask	Un-named/XXXX
Fiscal Year End	9/30/2018
Number of Funds	3
Number of Department Codes	10
Number of Manual Journal Entries (Monthly)	20
Number of Bank Accounts	9
Number of Annual Check Voids	25
Budgeting	

Pre-Encumbrance Controls?	No
Encumbrance Controls?	No
Budget Frequency	Annual
<b>Fixed Assets</b>	
Fixed asset tagging?	Yes
Fixed Asset Capitalization Threshold	250
<b>Purchasing/Contract Management/Inventory</b>	
Number of Purchase Orders per Month	15
Number of Vendors in Purchasing System	400
<b>Accounts Payable</b>	
Number of Invoices Input Annually	3,000
Frequency of Check Runs	Weekly
Check Signature Method	Hand-signed
Payments Types Supported	Credit card, cash, money order
Number of 1099s Processed Annually	25
<b>Human Resources and Payroll</b>	
Number of Permanent Employees	35
Number of Seasonal Employees	4
Number of Bargaining Units	0
Payroll Frequency	Weekly
<b>Business Tax Receipts</b>	
Number of Business Tax Receipts	600
Number of Annual New Business Tax Receipts	100
<b>Permitting</b>	
Number of Annual Inspections	3,800
Number of Annual Permits	1,000

**1.8 Overall Evaluation Process**

Responses to this RFP will be evaluated by a selection committee appointed by the Town Commission. The Town’s intent is to acquire the solution that provides the best value to the Town and meets or exceeds both the functional and technical requirements identified in this RFP.

The Town will be using the following process to reach a finalist Vendor decision:

- 1. **Minimum Criteria:** As part of the Vendor's RFP response, the following minimum criteria must be met for a proposal to be considered for further evaluation. Failure to meet all of these criteria will automatically disqualify the Vendor's response from further consideration:

- **Minimum Client Software Installations**  
Must have provided software for at least one previous municipality in the State of Florida, of similar size and complexity.
- **RFP Response**  
RFP response is submitted by the due date and time.
- **Response Authorization**  
The RFP response is signed by an authorized company officer.
- **Response Completeness**  
Vendor complied with all instructions in the RFP and provided a response to all items requested with sufficient detail, which provides for the proposal to be properly evaluated. Any deficiencies in this regard will be determined by the Town to be either a defect that the Town will waive or that the proposal can be sufficiently modified to meet the requirements of the RFP.
- **PCI Compliance**  
Where applicable, the Vendor shall certify in its Proposal that it meets Payment Card Industry (PCI) Data Security Standards (DSS), and if recommended for award, shall illustrate compliance.

- 2. **Round 2 Evaluation:** For those Vendors whose proposals pass the minimum criteria, the following categories of criteria will be used to further evaluate the proposals in the following order of preference from high to low:

Functional requirements	<b>30</b>
Cost including both initial and on-going	<b>20</b>
Implementation requirements	<b>15</b>
General Vendor to include number and size of comparable municipal installations, financial stability, completeness of response, and quality of proposal response	<b>15</b>
Technical requirements	<b>10</b>
GIS Services Proposed	<b>10</b>
<b>Total</b>	<b>100</b>

**Round 3 Evaluation:** The top Vendors in the second round evaluation will then proceed to an additional level of due diligence that may include the following activities:

- Follow-up questions and answers with the Vendors.
- On-site Vendor demonstrations to include module/functionality demonstrations, technical demonstrations, service presentation, and other due diligence.
- Reference checking with comparable entities using the Vendor's product.
- Potential site visits to comparable entities using the Vendor's product.

At any point in time during the third round of evaluation, a Vendor may be excluded from further consideration. At the conclusion of the round three activities, the finalist Vendors will be judged on all information collected to date against the following criteria in order of preference:

Functionality	<b>25</b>
Investment and costs	<b>20</b>
Service and support	<b>20</b>
Ability to deliver "out of the box" functionality	<b>15</b>
Technical requirements	<b>10</b>
GIS Integration	<b>5</b>
Vendor Viability and other value added	<b>5</b>
<b>Total</b>	<b>100</b>

The Town will then enter into contract negotiations with the Vendor whose overall solution best meets the needs of the Town over the long-term.

**1.9 Anticipated Timeline Overview**

Listed below are dates related to this request for proposal (RFP). In the event that these are changed, an addendum to this RFP will be issued.

Milestone	Timeframe
RFP issuance	June 25, 2018
Vendor pre-proposal meeting	July 9, 2018
Intent to propose form due from vendors	July 20, 2018
Deadline for clarification questions	July 24, 2018
Vendor proposals due	July 31, 2018
Notification of demonstration dates	August 2018
Demonstrations of software	Late August/Early September 2018
Site Visits and other due diligence	Fall 2018
Contract negotiations and award	Fall 2018

**2 Vendor Proposal Guidelines**

**2.1 Deadline for Proposals**

Proposals must conform to the requirements set forth in the RFP. Proposals not conforming to these guidelines may be rejected as non-responsive.

Proposals must be submitted **by 3:00 p.m., local time, July 31, 2018** to:

Town of Pembroke Park  
3150 SW 52<sup>nd</sup> Avenue  
Pembroke Park, FL 33023

The Vendor must submit **One (1)** signed, completed, original, **six (6) copies**, and **one (1) electronic copy** of the Vendor's technical proposal and **one (1) original and six (6) copies**, and **one (1) electronic copy** of the Vendor's cost proposal. The first page of the original proposals should be marked "Original" and the first page of the copies should be marked "Copy." The electronic proposals should also include the following files:

ERP System Selection RFP 20180625 - Specifications.xlsx  
ERP System Selection RFP 20180625 - Pricing Forms.xlsx  
ERP System Selection RFP 20180625 - Vendor Forms.docx

A technical proposal with the cost proposal must be accompanied in the same package. The electronic copy of the Vendor technical proposal response shall include the completed specification worksheets that have been provided in Microsoft Excel. The electronic copy of the Vendor cost proposal shall include the completed pricing worksheets that have been provided in Microsoft Excel.

All proposals must contain the following wording clearly marked on the outside of the envelope:

ERP System Selection RFP 20180625

Additionally, Vendors must send **one (1)** complete hard and **one (1)** electronic copy (including the files specified above) of both the technical and the cost proposal responses to:

Plante & Moran, PLLC  
Attention: Kim Szlachetka  
27400 Northwestern Hwy  
PO Box 307  
Southfield, MI 48037-0307

Proposals received after the deadline will not be accepted and will be returned to the sender unopened via certified mail. Proposals may not be delivered via facsimile or e-mail. Proposals shall be sent by Federal Express (or comparable carrier) or hand delivered to the above address. The full name and address of the proposer will be clearly marked on the outside of the package that is inside the Federal Express package or comparable carrier.

## 2.2 Preparation of Proposals

Proposals shall be prepared in accordance with the proposal response format, section 3. Proposals not complying with this format may be considered non-responsive and removed from consideration.

## 2.3 Intent to Propose

Prospective Vendors are encouraged to submit an intent-to-propose document via email before **July 20, 2018**. Submitting an intent-to-propose document does not obligate the Vendor to submit a proposal and is not mandatory to submit a proposal. By submitting this document, a prospective Vendor will receive amendments and notices to this RFP. The written intent-to-propose must include the company name, mailing address, phone number, and email address of the Vendor's

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main contact for communications regarding this RFP. Prospective Vendors should **email** this information to the following contact with a subject line of "ERP RFP Intent to Propose".

Mark Pakula  
[mpakula@townofpembrokepark.com](mailto:mpakula@townofpembrokepark.com)

Written responses to written questions and requests for clarifications regarding the RFP will be sent to all Vendors who have submitted an intent-to-propose document. Late receipt of intent to propose from Vendors will not have any impact on dates, deadlines, or timeframes set forth in this document.

## 2.4 Cone of Silence

Vendors are advised that a Cone of Silence will be in effect during this RFP. The Cone of Silence is effective from the deadline for Proposals Submittal until award is made by the Town Commission. The Cone of Silence prohibits any communications, regarding this RFP, between the Vendors or any person representing the Vendors, and any member of the Town Commission, the Commission's staff, any Town employee authorized to act on behalf of the Town to award the Agreement under this RFP, or any member of the Selection Committee. All correspondence regarding this RFP must be in writing and must be directed to Mark Pakula, who is the only person authorized to receive such documents.

The provisions of this Section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committee negotiations during any public meeting, presentations made to the Town Commission as applicable, and protest hearings. Further, the Cone of Silence shall not apply to Vendor negotiations between any employee and the intended awardee or any dispute resolution process following the filing of a protest between the person filing the protest and any employee.

## 2.5 RFP Clarifications and Questions

Potential proposers may submit questions to the Town about the contents of this document. All inquiries regarding this proposal must be written and should be **emailed** with a subject line of "ERP System Selection RFP 20180625" to:

Mark Pakula [mpakula@townofpembrokepark.com](mailto:mpakula@townofpembrokepark.com)

Inquiries regarding the proposal will be accepted up to and including July 24, 2018 **at 4:00 PM local time**.

## 2.6 Vendor Pre-Proposal Meeting

A non-mandatory Vendor pre-proposal meeting will be held on July 9, 2018 from 9:00 AM at:

3150 SW 52<sup>nd</sup> Avenue  
Pembroke Park, FL 33023

If you are unable to attend, please see section 2.6 for RFP clarification and questions.

## 2.7 Basis for Award, Evaluation Criteria and Questions

The qualification of proposal responders on this project will be considered in making the award. The Town is not obligated to accept any proposal if deemed not in the best interest of the Town. The Town reserves the right to accept or reject any and all proposals, in whole or in part at its sole discretion. The Town reserves the right to waive any informalities or irregularities in proposals. The Town reserves the right to negotiate separately the terms and conditions or all or any part of the proposals as deemed to be in the Town's best interest at its sole discretion. Information and/or factors gathered during the procurement process and any other information deemed relevant by the Town, shall be utilized in the final award. The final award of a contract is subject to approval by the Town Commission.

## **2.8 Advice of Omission or Misstatement**

In the event the Town has omitted or misstated a material requirement to this RFP and/or the services required by this RFP, the responding Vendor shall advise the contact identified in the *RFP Clarifications and Questions* section above of such omission or misstatement.

## **2.9 Confidential Information**

Information contained in the Vendor's proposal that is company confidential must be clearly identified. The Town will be free to use all information in the Vendor's proposal for its purposes. Vendor proposals shall remain confidential until the Town's Selection Committee makes its recommendation to Town Commission. The Vendor understands that material supplied to the Town may be subject to public disclosure under the Freedom of Information Act.

## **2.10 Award of Contract**

The Vendor shall be deemed as having been awarded a contract when the formal notice of acceptance of the Vendor's proposal has been duly served upon the intended awardee by an authorized agent of the Town. Note that the successful Vendor, at the time of contract execution, must be licensed to do business in the State of Florida.

## **2.11 Tax Exempt Status**

The Town is exempt from paying taxes. All prices should be quoted FOB Pembroke Park, FL.

## **2.12 Advertising**

Vendor shall not advertise or publish the fact that the Town has placed this order without prior written consent from the Town, except as necessary to comply with government regulations.

## **2.13 Right to Request Additional Information**

The Town reserves the right to request any additional information that might be deemed necessary during the evaluation process.

## **2.14 Proposal Preparation Costs**

The Vendor is responsible for any and all costs incurred responding to this request for proposal.

## **2.15 Pricing Eligibility Period**

All Vendor proposals must be offered for a term not less than **180 calendar days**. A proposal may not be modified, withdrawn or cancelled by Vendor during this time period following the proposal due date. The Town, may purchase a subset of the proposal components with the initial contract. The Town requires Vendors to honor software and services pricing established within the Vendor's proposal response for Vendor proposed components which are not included in the Town's initial purchase for a period of (3) years from the date of the Vendor's proposal. The price of these components can only be increased by the Vendor during this time by an amount equal to the annual CPI-U adjustment for the CPI region for Pembroke Park, FL or 3%, whichever is less.



**2.16 Additional Charges**

No additional charges, other than those listed on the price breakdown sheets, shall be made.

**2.17 Turnkey Solution**

All prices quoted must include all hardware equipment software and services necessary to make the system specified fully operational for the intent, function, and purposes stated herein. The Town reserves the right to purchase hardware separately.

**2.18 Purchase Quantities**

The Town reserves the right to purchase any quantities of hardware or software items bid without altering the unit purchase price upon award and throughout the contract period.

**2.19 Rights to Pertinent Materials**

All responses, inquires, and correspondence relating to this RFP shall become the property of the Town upon receipt, a part of a public record upon opening, and will not be returned.

**3 Proposal Response Format**

To facilitate the analysis of responses to this RFP, the Vendor is required to prepare their proposals in accordance with the instructions outlined in this section. **Vendors must respond in full to all RFP sections and follow the RFP format (section numbering, etc.) in their response. Failure to follow these instructions may result in rejection.**

Section	Title
1	Executive Summary
2	Company Background
3	Application Software
4	Technical Requirements
5	Vendor Hosted Option
6	Implementation Plan
7	Staffing Plan
8	Ongoing Support Services
9	Functional System Requirements
10	Client References
11	License and Maintenance Agreements
12	Exceptions and Deviations
13	Other Required Forms and Attachments
14	Cost Proposal
15	Addenda

**3.1 Executive Summary (Section 1)**

This part of the response to the RFP should be limited to a brief narrative not to exceed two (2) pages describing the proposed solution. The summary should be oriented toward non-technical personnel. The executive summary should not include any information about the cost.

**3.2 Company Background (Section 2)**

In addition to providing responses to the following items, the Vendor must complete the **Vendor Proposal Form** in **section 7.5** of this RFP.

Information that Vendors should provide in this section are as follows:

1. The company's background including a brief description (e.g., past history, present status, future plans, company size, key differentiators, etc.) and organization charts.
2. Your commitment to the public sector marketplace, including the year the solution began being sold to public sector clients.
3. Audited financial information for the past TWO (2) completed fiscal years that includes income statements, balance sheets, and statement of cash flows.
4. Privately-held companies wishing to maintain confidential financial information must provide information detailing the company's long-term stability. Please provide a current Dunn & Bradstreet report (D&B) as part of the Vendor proposal response.
5. If the Vendor is proposing to use subcontractors on this project, please provide Vendor relationship with that firm and the specific services and/or products that the subcontractor will be providing on the project. A complete list of subcontractors is required. The Town has the right to approve all sub-contractors of the Vendor at any time.

### 3.3 Application Software (Section 3)

The Vendor is required to provide a general description of the application and how it will meet requirements of this RFP. This section must address, at a minimum, the following items:

1. Describe your overall proposed technology solution, including any unique aspects.
2. For third party products proposed, provide the following for each product:
  - a. Reason a third party product is proposed versus the Vendor's solution/
  - b. Extent to which this third party product is integrated with the Vendor's solution.

### 3.4 Technical Infrastructure (Section 4)

Vendors should identify where conflicts may exist between their solution and current technologies being used in the Town as described in section 1.4.

3. Hardware and Storage Environment
  - a. Describe the proposed computer hardware and storage environment to support the system. If multiple options, indicate which is the preferred hardware platform and why. Provide a hardware configuration which takes into account the size of the Town, application modules, database size, and anticipated growth.
  - b. What system architecture do you propose? Describe the number and type of: application servers, database server(s), and development and test environments. Describe your proposal's technical architecture (preferably using a PowerPoint or Visio diagram). This should show components such as the database server, applications server, reporting server, test/training server, firewall(s), web server(s), web browser, minimum workstation requirements, remote access, wireless connectivity, network connectivity to LANs and WAN, etc. Describe any potential use of virtual server technologies (e.g. Microsoft Virtual Server, VMware) and application accelerators and note what Vendors you partner with or recommend and/or support.
  - c. Identify the communication protocols and networking requirements that are required for implementation and operation of the proposed system. In the event that there are multiple communication systems and/or protocols available, list all options. Take into account the Town's current WAN and remote computing requirements and indicate what changes are required or recommended.
  - d. Describe what, if any, footprint exists on each user's desktop.
  - e. What are your guarantees on system performance?

### 3.5 Vendor Hosted Option (Section 5)

1. Please describe your **vendor hosting model**, including: hosting, integration, help desk, provisioning and desktop management capabilities, minimum hardware requirements for computers, deployment model (dedicated servers, shared environment, etc.), impact to and requirements of the Town's network and bandwidth, and any partners that may be involved in service delivery.
2. Please describe your proposed **service level agreement**, including any tiered levels of service, response times, and standard metrics.
3. Please describe your **support model**, including: cost structure for support calls.
4. Please describe your **data center and storage facilities**, including: locations, staffing, physical security, environmental controls (including redundant power), redundancy/load balancing capabilities, data backups and disaster recovery capabilities.

5. Please describe your **change management**, upgrade, and patch management practices
6. Describe your **systems administration/management** capabilities including: monitoring of performance measures, intrusion detection, and error resolution.
7. Describe how you will help the Town move to a new operation at the **end of the contract** term or if the contract is terminated.
8. Please provide the total number of clients and end-users utilizing your proposed solution.
9. Please provide a copy of your most recent **SSAE 16 Type II audit**.

### **3.6 Implementation Plan (Section 6)**

The Vendor is to provide an implementation plan in narrative format supported by an activity-level project plan (similar to a Microsoft Project file) that details how the proposed solution is to be implemented. This implementation plan should include, at a minimum, the following elements:

1. General Implementation Approach
2. Project Management Approach
3. Hardware, Software & Storage Design and Installation Consulting
4. Data Conversion Plan
5. Report Development
6. Integrations and Interfaces
7. Training
8. Change Management Approach
9. Testing
10. Operational Redesign Approach
11. System Documentation and Manuals
12. Disaster Recovery Plan
13. Knowledge Transfer

**It is expected that the Vendor will lead the efforts in each of the implementation areas described below unless stated otherwise.**

#### **3.6.1 General Implementation Approach (Section 6.1)**

Provide a general overview of the implementation approach you plan to use for the Town that includes addressing the following items:

1. Describe key differentiators of the approach as it relates to implementing a solution on time, within budget and with the ability to meet the needs of a client like the Town.
2. Describe how you conclude on a preferred implementation phasing of software modules. What is your recommended approach for this implementation?
3. Describe your approach towards running parallel systems for a period of time.

#### **3.6.2 Project Management Approach (Section 6.2)**

The Town expects the Vendor to provide “on the ground” project management resources for the system implementation. Costs for this should be clearly denoted in the pricing section.

Provide an overall description of the Vendor project management approach and projected timing for major phases. Include a high-level work plan for achieving a successful deployment.

**3.6.3 Hardware, Software and Storage Design and Installation Consulting (Section 6.3)**

The Town usually installs required equipment for applications. We are open to other proposals to accomplish a successful deployment. What do you propose for the most effective deployment of hardware, communications and related equipment?

**3.6.4 Data Conversion Plan (Section 6.4)**

The Vendor shall assist the Town in the conversion of data to the new system. The Town will be responsible for data extraction from current systems and data scrubbing and that the Vendor will be responsible for overall data conversion coordination, definition of file layouts, and data import and validation into the new ERP. Please provide pricing for data conversions in the associated Microsoft Excel pricing spreadsheet. Additionally:

1. Describe your general approach towards data conversion, retention of legacy data, and how you would work with the Town to conclude on what should be converted.

**3.6.5 Report Development (Section 6.5)**

It is anticipated that the Vendor will take the lead on developing any reports required as part of the system implementation. The Vendor is expected to provide technical training on the tools used for report development, database schema and architecture, etc. Provide information on your reporting approach including:

1. Description of available methods of reporting (including business intelligence),
2. Approach to work with the Town to identify, specify, and develop any required custom Town reports during the implementation.
3. Provide a listing of available out of the box reports.

**3.6.6 Integrations and Interfaces (Section 6.6)**

It is expected that information generally will only need to be entered once in the system, and that modules within the system are 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. Existing Town interfaces between core modules that may currently exist (e.g., AP posting to GL) or shadow systems that will likely be replaced are not included in this section as they are assumed to be included in an integrated ERP System.

The Microsoft Excel pricing sheet contains a listing of current and/or desired application interfaces. Please provide pricing for interface development in the associated Microsoft Excel pricing spreadsheet.

In addition:

1. Describe the extent to which the various modules are integrated together versus being purchased separately and interfaced
2. Describe your approach towards interfacing and integration with other solutions
3. Describe data exchange standards (e.g. XML, Web Services, or EDI) supported
4. Using the Town's current technical environment described above, identify potential issues for integrating with specific technologies that are used within the Town.

5. If local customizations are made, do you provide any tools or assistance to easily incorporate customizations into new version/releases of your software?
6. **GIS services:** The Town is seeking services to configure and interface GIS resources (database, applications, access) with the future ERP software and would like this GIS database to be hosted by a third party. This would include identifying data sources, managing the data governance and quality, and hosting the environment.
  - a. Have you ever provided these services or worked with a third party to provide these services? If so, please provide information about the service options, previous clients, and include pricing in your pricing form under the appropriate line item.

### **3.6.7 Training (Section 6.7)**

The Town intends to explore the advantages, disadvantages and costs of two implementation training approaches:

1. End User Training Approach: All end-user and technical training will be performed on-site through implementation and be performed by the Vendor.
2. Train the Trainer Approach: The Vendor will incorporate a “train the trainer” approach where only key Town team leads will be trained on their modules and they will train the remainder of the Town staff with training materials supplied by the Vendor .

The Vendor should provide an overall description of both training methods (if available as options) and their recommendation, including the following:

- General timeframes in which both types of training will be conducted
- Materials that will be provided during training
- The nature and amount of training to be provided in the following areas:
  - Technical training (e.g., programming, operations, etc.)
  - User training
  - Other staff (e.g., executive level administrative staff)

Additionally, please provide information on the following:

- Options for online training versus in-person classroom training
- Opportunities for ongoing training post go-live (e.g. new hires, refresher training)

### **3.6.8 Change Management Approach (Section 6.8)**

The Town recognizes that a movement from the current environment to a new solution will present change management challenges. The Vendor should clearly identify their approach towards Change Management, including any unique approaches or tools that will be used.

### **3.6.9 Testing (Section 6.9)**

The Vendor should describe their recommended approach to the following types of testing that are anticipated to be performed on the project and the type of assistance they anticipate providing to the Town related to such testing:

- a. System testing
- b. Integration testing
- c. Stress/performance testing
- d. User acceptance testing (UAT)

**3.6.10 Operational Redesign (Section 6.10)**

The Town wishes to implement operational improvements. Vendors are requested to describe their approach towards operational redesign. In addition, please describe your organization's capabilities to assist in a Townwide redesign of the chart of accounts.

**3.6.11 System Documentation and Manuals (Section 6.11)**

The Vendor is expected to provide user manuals and online help for use by the Town as part of training and on-going operational support. Additionally, the Vendor is expected to provide technical documentation.

1. Describe what documentation (user guide, technical guide, training materials, etc.) is available on the system proposed and any related costs.
2. Describe what types of documentation you anticipate developing during the project.

**3.6.12 Disaster Recovery Plan (Section 6.12)**

Please describe the services you provide around disaster recovery as part of your solution.

**3.6.13 Knowledge Transfer (Section 6.13)**

Describe the process for ensuring that a transfer of knowledge occurs back to Town staff such that staff is capable of supporting and maintaining the application.

**3.7 Staffing Plan (Section 7)**

1. The Vendor must detail the type and amount of implementation support to be provided (e.g., number of personnel, level of personnel, time commitment, etc.). Include resumes for all personnel that will be assigned to the project. If the Vendor is using a subcontractor, please include information on subcontracting staff being used and their specific role on the project.
2. Please provide an overall project organizational structure for Town staff involvement during the project. Identify the roles and responsibilities of each component of this structure.
3. Please provide an overview of the Town staff that are expected to be committed to the project implementation, in table format. This overview should clearly delineate business versus technical staff, and represent commitments in terms of FTEs.

**3.8 Ongoing Support Services (Section 8)**

1. Please specify the nature and conditions of any post-implementation support options including:
  - a. Post-go live support that is included in the proposal response
  - b. Onsite support (e.g. system tuning, application configuration, interface issues, report development, network optimization, user training and tips)
  - c. Telephone support
  - d. Help Desk services (Provide a service level agreement for your help desk if it exists. Include any limits on the number of staff who may call in.)
  - e. Users group (i.e. overview, location, and timing).
  - f. Online knowledgebase

2. Describe your maintenance programs and options with associated pricing.
3. Provide an overview of the update process, including major version updates and patches. Include the process, as well as the frequency they are released.
4. How can the Town change their configurations without Vendor involvement?
5. Please provide an overview of the Town staff that are required for ongoing application support, in table format. This overview should clearly delineate business versus technical staff, and represent commitments in terms of FTEs.

### **3.9 Functional System Requirements (Section 9)**

Responses to the requirements referenced in section 4 of this RFP must be provided in this section of the Vendor's response. Use the Microsoft Excel specification spreadsheet provided and attach explanation pages if necessary. Include any costs associated with modifications in the Microsoft Excel pricing spreadsheet as well. **Please note: The response to these requirements should be provided in the exact format as provided (e.g. no additional macros, formulas, additional columns, modifications, passwords, etc.). Failure to do so can result in disqualification of the entire proposal.**

### **3.10 Client References (Section 10)**

The Vendor must provide at least five references from clients that are similar in size and complexity to the Town in the format provided in **section 7.6**. The Town also requests a listing of all municipal clients.

### **3.11 License and Maintenance Agreements (Section 11)**

Sample license and maintenance agreements must be provided in this part of the Vendor's response for all components of the recommended solution. Indicate the basis on how licenses are determined.

### **3.12 Exceptions and Deviations (Section 12)**

If the Vendor finds it impossible or impractical to adhere to this RFP, it shall be so stated in its proposal, with all deviations grouped in a separate section entitled, "exceptions/deviations from proposal requirements." Objections or deviations expressed in other parts of the proposal, either directly or by implication, will not be accepted, and the Vendor in submitting a proposal, will accept this stipulation without recourse.

### **3.13 Other Required Forms and Attachments (Section 13)**

Please provide all other required forms in this section:

- a. Proposal Signature Form
- b. Non-Collusion Affidavit
- c. Minimum Criteria
- d. Supply a copy of your Independent Service Auditor's Opinion Letter from your most recent SSAE 16 Type II audit.

### **3.14 Cost Proposal (Section 14)**

Costs for the Vendor's proposed solution should be submitted on the proposal pricing forms provided in the associated Microsoft Excel pricing spreadsheet. Pricing forms must remain in the original Excel format—failure to do so may result in disqualification of the proposal. If additional



pricing forms are provided in the Vendor’s proprietary format, evaluation will still be performed based on the costs in the included Microsoft Excel form.

- The Town will not consider time and materials pricing. Vendors shall provide firm and fixed pricing and denote if each cost is one-time, annual, or other.
- The Vendor shall provide price information for each component of the proposed solution, as well as any modifications necessary to fully comply with the RFP specification response.
- In the event the product or service is not included, the item should be noted as "No Bid".
- In the event the product or service is provided at no additional cost, the item should be noted as "no charge" or "included." Otherwise, it will be assumed the item is "No Bid"
- Vendor shall provide prices in U.S. dollars.
- For software license fees, Vendor shall clearly define the license type (i.e. named user vs. concurrent user), number of licenses, and version of software licensed in the Module Information tab.
- To the extent possible, Vendors shall show any applicable discounts separately.
- Although the Town prefers that Vendors provide separate prices for each item, the Vendor may present alternatives (i.e. bundled pricing) if such pricing would be advantageous to the Town. In this case, please describe where the component costs are included using the Module Information tab.

**The Town is only interested in a vendor-hosted solution.**

**3.15 Addenda (Section 15)**

Include all original, signed copies of addenda in this section.

**The Town is only interested in a vendor-hosted solution.**

**4 Functional Requirements**

**4.1 Introduction**

The requirements in this section contain the desired functionality of the requested software solution. **Identified in the attached Excel spreadsheet are the requirements/specifications that must be addressed by the vendor's proposal.** These requirements are mandatory in implementing the solution as defined in section 1.6. Vendors must replace cells A1:G1 in the first module (General and Technical Requirements) with the vendor’s **Company Name** which will be repeated and printed for each subsequent module.

The **Priority** column includes one of the following entries to indicate the importance of the specification/report to the Town:

<b>“H” – High:</b>	This is a feature that the Town requires in the future solution.
<b>“M” – Medium:</b>	This is a feature that the Town would like in the new system, but is not an absolute necessity.
<b>“L” – Low:</b>	This would be a feature that, while of interest, is not applicable at this time or is something that could be a future deployment.

Each vendor should review the specifications listed and respond with their availability within the Vendor’s proposed solution. The responses should be entered under the “**Availability**” column of each form as follows:

<b>Y</b>	Functionality is provided out of the box through the completion of a task associated with a routine configurable area that includes, but is not limited to, user-defined fields, delivered or configurable workflows, alerts or notifications, standard import/export, table driven setups and standard reports with no changes. These configuration areas will not be affected by a future upgrade. The proposed services include implementation and training on this functionality, unless specifically excluded in the Statement of Work, as part of the deployment of the solution.
<b>R</b>	Functionality is provided through reports generated using proposed Reporting Tools.
<b>T</b>	Functionality is provided by proposed third party functionality (i.e., third party is defined as a separate software Vendor from the primary software Vendor). The pricing of all third party products that provide this functionality <b>MUST</b> be included in the cost proposal.
<b>M</b>	Functionality is provided through customization to the application, including creation of a new workflow or development of a custom interface, that may have an impact on future upgradability.
<b>F</b>	Functionality is provided through a future general availability (GA) release that is scheduled to occur <u>within 1 year</u> of the proposal response.
<b>N</b>	Functionality is not provided

Use the **Cost** column for “M” or “F” responses to estimate the cost to be incurred by the Town to secure the specification, if necessary. Use the **Comment** column to provide additional comments pertaining to your response for that item.

The **Required Product(s)** column is to be used to specify what product (e.g. product name or software module) is proposed. The cells D10:G10 in the form which currently read “*Replace this text with the primary product name(s) which satisfy requirements*” must be updated. This name will be automatically populated in the **Required Product(s)** column for each specification in the module. The automatically filled values in this column must be updated for any exceptions where a different or additional product is required to satisfy the requirement.

Vendors proposing a multi-product solution should complete a General and Technical module specification response for each product.

**Please note: The response to these requirements should be provided in the exact format as provided (e.g. no additional macros, formulas, additional columns, modifications, passwords, etc.). Failure to do so can result in disqualification of the entire proposal.**

## **5 Proposal Forms**

### **5.1 Introduction**

This section contains various forms that should be prepared and submitted along with the Vendor’s proposal. The intent of providing such forms is to ensure comparability between proposals. Included in this section are the following forms:

- Minimum Criteria
- Proposal Signature Form
- Non-Collusion Affidavit
- Vendor Information Form
- Client Reference Form
- Pricing Forms

### **5.2 Minimum Criteria**

As noted in section 1.8 of this RFP, proposed solutions **MUST** meet all of the following requirements. **Proposals not meeting these requirements will be rejected.** Vendors should acknowledge acceptance of these terms and include the following checklist in their RFP response.

<b>Minimum Criteria</b>	<b>Yes/No</b>
<b>Minimum Client Software Installations</b>	
Must have provided software for at least one previous municipality in the State of Florida, of similar size and complexity.	
<b>RFP Response</b>	
RFP response is submitted by the due date and time.	
<b>Response Authorization</b>	
The RFP response is signed by an authorized company officer.	
<b>Response Completeness</b>	
Vendor complied with all instructions in the RFP and provided a response to all items requested with sufficient detail, which provides for the proposal to be properly evaluated. Any deficiencies in this regard will be determined by the Town to be either a defect that the Town will waive or that the proposal can be sufficiently modified to meet the requirements of the RFP.	
<b>PCI Compliance</b>	
Where applicable, the Vendor shall certify in its Proposal that it meets Payment Card Industry (PCI) Data Security Standards (DSS), and if recommended for award, shall illustrate compliance.	

**5.3 Proposal Signature Form**

The undersigned, as authorized proposal responder, declares that he/she has carefully examined all the items of the Specifications and Instructions herein that he/she fully understands and accepts the requirements of the same, and he/she agrees to furnish the specified items and will accept, in full payment therefore, the amount specified below. The proposal responder will identify below its business entity as individual, DBA, partnership, corporation (foreign or domestic), and will indicate the official capacity of person(s) executing this proposal.

Proposals shall include installation services, and the successful respondent shall obtain all required permits and pay fees required.

State payment terms:

State term proposal is held firm for:

State warranty on equipment:

State maximum time required for shipping, F.O.B. Pembroke Park, FL:

**PROPOSAL: ERP System Selection RFP 20180625**

\$ \_\_\_\_\_  
(Total price spelled out in words)

\$ \_\_\_\_\_  
(Total figure in numbers – must equal the figure on the Pricing Form)

Firm Name: \_\_\_\_\_

Date: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Signature: \_\_\_\_\_

(Person executing response and official capacity)

(Names of principal officers:  
designate official capacity)

(If partnership or assumed name,  
indicate name of owners)

\_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_

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\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5.4 Non-Collusion Affidavit**

**THE AFFIDAVIT SET FORTH BELOW MUST BE EXECUTED ON BEHALF OF THE VENDOR AND FURNISHED WITH EVERY PROPOSAL  
NON-COLLUSION AFFIDAVIT**

STATE OF: \_\_\_\_\_

Town OF: \_\_\_\_\_

TAX ID NUMBER: \_\_\_\_\_

\_\_\_\_\_, being duly sworn, deposes and says he/she is the \_\_\_\_\_ (Name) (Title)

Of \_\_\_\_\_ the proposal responder that has  
(Company)

submitted to the **Town** a proposal for a **ERP System Selection RFP 20180625** all as fully set forth in said proposal and that except as specified below, the aforementioned proposal responder constitutes the only person, firm, or corporation having any interest in said proposal or in any contract, benefit, or profit which may, might or could accrue as a result of said proposal, said exceptions being as follows:

\_\_\_\_\_  
(If no exceptions, please state)

Vendor further states that said proposal is, in all respects, fair and is submitted without collusion or fraud; and that no member of the **Town** is directly or indirectly interested in said proposal.

\_\_\_\_\_  
(Affiant)

SWORN TO and subscribed before me, a Notary Public, in and for the above named State and City

this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
(Day) (Month) (Year)

\_\_\_\_\_  
(Notary Public)

**5.5 Vendor Proposal Form**

Vendor name:	
Software brand name:	
Software version proposed & number of years in production:	
Is Vendor prime contractor:	Yes <input type="checkbox"/> No <input type="checkbox"/>

1.	How do you guarantee the services provided by your company?		
2.	Please describe the level of research and development investment you make in your products (i.e. – annual budget, head count, etc.).		
3.	How many fully operational (i.e. Live) customer installations of the version proposed in this RFP, currently in production, has the Vendor completed?		
		<b>Florida</b>	<b>Nationally</b>
	Local government		
	Other public sector		
	Other non-public sector		
	<b>Overall:</b>		
4.	How many fully operational customer installations (i.e. Live), of all versions, has the Vendor completed?		
		<b>Florida</b>	<b>Nationally</b>
	Local government		
	Other public sector		
	Other non-public sector		
	<b>Overall:</b>		
5.	How many current system implementations of your solution are <i>in-process</i> within both the State of Florida and the Vendor-defined region of the Country that includes the State of Florida?		
		<b>Current in-process Implementations</b>	
	State of Florida		
	Region		
	<b>Total:</b>		
6.	Where is the Vendor's closest support facility/sales office to Pembroke Park, FL?		
7.	Where is the Vendor's company headquarters?		
8.	Please list the Vendor's sales in the previous three years:		
	<b>Year</b>	<b>Sales</b>	

		2017		
		2016		
		2015		
9.	How many total employees does the Vendor have in each of the following categories:			
		<b>Area</b>	<b>Number</b>	
		Sales/Marketing		
		Management/Administration		
		Help Desk Staff		
		Development Staff		
		Other		
		<b>Total:</b>		
10.	What is the Vendor's hourly rate for implementation assistance beyond that which is included in the Vendor bid by skill set?			
		<b>Rates for Additional Implementation Assistance</b>		
		<b>Skill Set</b>	<b>Hourly Rate</b>	
			\$ / hr.	
			\$ / hr.	
			\$ / hr.	
11.	Please indicate two separate potential visits of four consecutive days each in which the Vendor will commit to being available for an onsite demonstration and your preference.			
		<b>Demonstration Date Options</b>		
		<b>Option</b>	<b>Available/ Priority #</b>	<b>Not Available</b>
		Week of August 18		
		Week of August 25		
		Week of September 2		
12.	What would be the Vendor's preferred comparably sized, site visit location?			
13.	What is the total duration of your proposed implementation approach?			
14.	Please list all third party solutions proposed.			
15.	What database are you proposing?			
16.	Is the solution hosted by the vendor or a third-party?			
17.	Please describe the minimum commitment term (in years) for a vendor-hosted option and note the term assumed for determining the proposed costs.			
18.	What is the query tool and report writer that Vendor is proposing?			

19.	What is your recommended approach to training (End-user vs. train the trainer), for this Town, and why?																					
20.	Identify the degree to which Vendor staff will be onsite versus off-site during the project.																					
21.	Will the vendor contractually agree to:																					
	<table border="1"> <thead> <tr> <th colspan="3">Contractual Inquiry</th> </tr> <tr> <th>Term / Condition</th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>Provide <u>on-site</u> staff for training and implementation</td> <td></td> <td></td> </tr> <tr> <td>Non-performance hold-backs?</td> <td></td> <td></td> </tr> <tr> <td>Payment hold-backs until fully operational and formally accepted?</td> <td></td> <td></td> </tr> <tr> <td>Allow the Town to approve Vendor staff assigned to help with implementation?</td> <td></td> <td></td> </tr> <tr> <td>One year warranty, during which the annual support conditions apply. The first, annual support payment would occur after the warranty period expires</td> <td></td> <td></td> </tr> </tbody> </table>	Contractual Inquiry			Term / Condition	Yes	No	Provide <u>on-site</u> staff for training and implementation			Non-performance hold-backs?			Payment hold-backs until fully operational and formally accepted?			Allow the Town to approve Vendor staff assigned to help with implementation?			One year warranty, during which the annual support conditions apply. The first, annual support payment would occur after the warranty period expires		
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22.	Describe how your software will be licensed to the Town (e.g. site license, named users, concurrent users, etc.)																					





## 5.7 Pricing Forms

Please complete the pricing forms that have been provided in the associated Microsoft Excel pricing spreadsheet. It is the responsibility of the Vendor to ensure the accuracy of the pricing provided as part of your response. Any errors in providing an accurate price response due to inaccuracies in the provided templates are the sole responsibility of the responding Vendor. If there is not enough space to describe the pricing on these forms, please attach a separate pricing page and provide the pricing information in the same type of format so that it is easy to understand. The Town requests a firm, fixed price for each of the components described below that are included on the attached Microsoft Excel pricing spreadsheet as separate tabs:

- Vendor Checklist (including Hosting/Licensing Model, Travel & Lodging Costs, and Discount)
- Proposal Summary (no direct input required)
- Module Summary (no direct input required)
- Application Software
- Other Software
- Hardware
- Implementation Services
- Train-the-Trainer Training
- Optional End-User Training
- Interfaces
- Modifications
- Other Implementation Services