City of Woodland

Request for Proposal

for
Enterprise Resource Planning (ERP) System/Best of Breed Solutions and Services

Request for Proposal (RFP)

Issue Date: Tuesday, December 22, 2020

Response Due Date/Time: February 4, 2021, 4:00 p.m. PT

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1 RFP Overview

1.1 Purpose of RFP

The City of Woodland (City) has issued this Request for Proposal (RFP) to solicit responses from vendors offering proven integrated solutions to replace the City's existing financial, land management, human resource and timekeeping system. The City seeks a qualified vendor (Proposer) who can demonstrate that they possess the organizational, functional, and technical capabilities, along with the experience, expertise, and qualifications necessary to provide a fully-integrated, proven state-of-the-art Enterprise Resource Planning (ERP) System solution OR Best of Breed solutions along with the professional services specified to complete implementation and to support the system post implementation.

1.2 Project Objectives and Scope

With this RFP, the City intends to replace its existing ERP system with a proven, commercial-off-the-shelf (COTS) ERP system or with various proven systems with demonstrated superior performance that can be easily integrated or can communicate with one another (Best of Breed solutions). The City's goal is to take advantage of a modern system or systems that are designed around best practices, allowing the City to streamline and improve processes that result in timely, accurate, and easy-to-access information. More specifically, the new system or systems should meet the following objectives:

- Enable the City's ongoing commitment to excellence in financial, human resources, and land management
- Consolidate information, link processes and functions, and eliminate separate departmental systems/spreadsheets/access databases in favor of a single system that connects the City's financial and non-financial applications through a common database
- Streamline business processes to take advantage of best practices through automation, integration, and workflows
- Provide a user-friendly and intuitive user interface to promote system use and productivity
- Eliminate or reduce redundant data entry
- Eliminate or reduce the need for manual input when preparing various financial documents, including the annual budget.
- Improve and/or provide necessary reports and reporting capabilities and access to data through inquiry or drill down capabilities
- Provide interface capabilities with third-party systems (For example, Telestaff, CityWorks, etc.)

In addition to the functionality identified above, the City is seeking a Proposer to provide professional services (e.g. best practices guidance, training, project management, implementation, data conversion, and integration) that will help ensure a successful implementation in a timely and professional manner.

1.3 RFP Timeline

Table 1 presents the RFP Timeline.

Exhibit 1. RFP Timeline

RFP EVENT	DATE/TIME
City Issues RFP	December 22, 2020
Deadline for Proposer Questions	January 14, 2021
City Provides Response to Questions	January 26, 2021
Deadline for Proposal Submission	February 4, 2021
City Completes Evaluations	March 12, 2021
Finalist Notified	March 17, 2021
Finalist Provided Proof-of-Capabilities (POC) Packet	March 17, 2021
POC Demonstrations	May/July 2021
Contract Negotiations	July/August 2021
Announcement of Selected Proposer	August 2021
Award of Proposal & Contract Execution	August 2021

As identified in Exhibit 1, finalist(s) will be required to participate in a proof-of-capabilities (POC) demonstration to allow staff to fully understand the proposed solution. The POC process entails a scripted demonstration using scenarios/scripts developed by the City to evaluate critical product functionality rather than the City viewing a generic product demonstration.

Proposers must be prepared to invest the time and resources in the proof-of-capabilities demonstration to be successful in this procurement.

At the completion of the POCs, the City intends to select a finalist that may be asked to participate in further solution demonstrations to ensure that all pertinent modules are reviewed prior to finalizing negotiations. The City reserves the right, at its sole discretion, to adjust the RFP Timeline as it deems necessary.

1.4 RFP Coordinator

All communications concerning this RFP must be submitted via email to the RFP Coordinator identified below.

Email: RFP.21@cityofwoodland.org

The RFP Coordinator will be the sole point of contact for this RFP. **Proposer contact with any person(s) in the City other than the RFP Coordinator is expressly forbidden and may result in disqualification of the Proposer's bid. Any communications other than via email to the RFP Coordinator will be considered unofficial and non-binding on the City.**

1.5 RFP Amendment and Cancellation

The City reserves the unilateral right to amend this RFP in writing at any time. The City also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued, notification shall be provided to all Proposers complying with Section 1.7 Intent to Propose and the amendment posted on the City's website: https://cityofwoodland.org/bids. Proposers must respond to the final written RFP, including any exhibits, attachments, and amendments.

1.6 RFP Questions

Questions concerning the RFP should be submitted via e-mail to the RFP Coordinator prior to the "Deadline for Proposer Questions" identified in Section 1.3. Proposer questions should clearly identify the relevant section of the RFP and page number(s) related to the question being asked. The questions submitted, and the City's responses shall be posted on the City website identified in Section 1.5.

1.7 Intent to Propose

Each Proposer who plans to submit a proposal should register by email to the RFP Coordinator. The email should indicate the Proposer's intent to respond to this RFP. The email should include:

- Proposer's company name
- Proposer's intent to respond to this RFP
- Name and title of Proposer main contact
- Address, telephone, and email address

The "Intent to Propose" email does not bind Proposers to submitting a proposal.

1.8 Proposal Submittal

Proposals are to be submitted no later than the "Deadline for Proposal Submission" identified in Section 1.3. Proposers assume the risk of the method of delivery chosen. The City assumes no responsibility for delays caused by any delivery service. A Proposer's failure to submit a proposal as required before the deadline may cause the proposal to be disqualified.

Proposers must submit in a sealed package: one (1) original, one (1) copy, and one (1) electronic copy (a single .pdf file containing all submitted material, as well as copies of Appendix A and Appendix B).

The proposal package shall be mailed, couriered, or hand delivered to the City at:

City of Woodland – ERP\Best of Breed RFP Proposal
300 First Street
Woodland, CA 95695

The package should be clearly labeled as follows:

ATTN: Ana Gonzalez, City Clerk
Proposal for ERP\Best of Breed RFP Proposal
Thursday, February 4, 2021 – 4:00 p.m., PT

Name of Proposing Firm
Proposer's Address
Proposer's Contact Person
Proposer's Telephone Number

All information must be received by the City on the date/time indicated in Section 1.3. Information received after this time and date may be returned unopened, and the Proposer could be disqualified from future consideration. Postmarks will not be accepted as proof of receipt.

2 City Overview

Woodland has a population of approximately 60,000, and is the County seat of Yolo County. Woodland is located 20 miles northwest of Sacramento at the intersection of Interstate 5 and State Route 113. To the south is the City of Davis, with its University of California campus. The Sacramento International Airport is eight miles to the east.

Woodland has a strong historic heritage, which is reflected in an impressive stock of historic buildings in its downtown area and surrounding neighborhoods. The agricultural setting is largely responsible for the community's distinct identity and plays an important economic role in Woodland. Due to its proximity to major transportation nodes, Woodland has also become increasingly important as a manufacturing and distribution center.

The City employs approximately 310 FTE and 100-300 seasonal, temporary employees within 7 departments. These employees report to work at various locations throughout the City.

Refer to the City's website at http://www.cityofwoodland.org for more information.

All city services are organized within departments under the City Manager.

Administrative Services
The Department of Administrative Services provides a wide variety of services to all City Departments, City employees, City Council and various commissions and boards. Some of the department's primary resource management services include

- Audio / video services
- City Clerk services
- Financial services
- Human Resource management
- Information Technology management
- Purchasing services

Administrative Services contributes directly to the success of the following departments by providing quality services, specialized support and innovative solutions.

Community Development
The responsibilities of the Community Development Department include, but are not limited to

- Administering the City's General Plan, Zoning Ordinance, and California Environmental Quality Act Guidelines
- Acting as support staff to the City Council, Board of Building Appeals, and Planning Commission on planning matters
- Administering the City's Building Code including the issuance of building permits and conducting inspections
- Issuance of business licenses
- Ensuring compliance with City codes
- Providing partnerships for local economic development efforts
- Enhancing the quality of the local economic base

- Managing environmental services including sustainability efforts such as energy reduction, monitoring greenhouse gas emissions, solid waste reduction, recycling, and water conservation
- Providing engineering services for new development, utility infrastructure, and transportation infrastructure including design, construction and long-term maintenance planning and programming

Community Services
Woodland Community Services Department creates and enhances the quality of life for Woodland residents and visitors by providing a diverse array of programs, services, and recreational facilities. The department consists of four divisions including:

- CDBG & Affordable Housing
- Community Services
- Parks and Urban Forestry
- Senior Services

Fire
The City of Woodland Fire Department is truly a historic institution. For nearly 150 years, the Woodland Fire Department has worked to protect its community from the dangers of fires. Today the Fire Department continues this community service with all of the modern resources at its disposal.

- The Fire Department serves its community with three permanent fire stations, each of which is staffed by firefighters 24 hours a day, 7 days a week.
- In addition to fighting fires, the department attempts to prevent fires before they occur by providing educational outreach to people of all ages within the community and Fire Prevention services.

Police
Since 1871 the Police Department has aimed to improve the quality of life for all citizens of Woodland by administrating programs which prevent, investigate, solve and ultimately decrease crime.

Public Library
The Woodland Public Library offers literacy services, programs and events, clubs, teen and kid resources and so much more.

Public Works
The huge job of maintaining and expanding the City of Woodland's transportation and utilities infrastructure falls to the Public Works Department. The pavement under our feet, the water in our glasses, the guidance of traffic signals. All of these services are the product of the great people in this department. Their objective is to deliver cost-effective public works infrastructure and services to the City of Woodland to meet both current and future needs. The Public Works Department is divided up into several divisions:

- Administration - Public Works Administration consists of department level management and administrative staff for all Public Works Divisions.
- Fleet & Facilities - Fleet Services provides maintenance, repair, and service calls for over seven-hundred City vehicles, trailers, and miscellaneous equipment units as well as maintenance and repair of all City facilities.

- Right-Of-Way - The right-of-way division is made up of three work groups: electrical (traffic signals and street lights), signs and markings, and road maintenance.
- Utilities Infrastructure - The City of Woodland Utilities Division provides safe, reliable, and efficient water, sewer and storm service to the community of Woodland.

3 Current Environment

This section documents the state of the current environment to help Proposers prepare their proposal responses.

The City of Woodland uses the Tyler Technologies Eden (Eden) ERP system to support many of its financial, operations, and administrative functions. While Eden has served the City well for 12 years, system enhancements and improvements are minimal, and its long-term future viability is in question (system end-of-life is anticipated to occur sooner rather than later). The City's current agreement with Eden includes software, maintenance, and some hosting services. These are the current modules in use:

- Accounts Payable
- Accounts Receivable
- Budget (with ability for two year budget)
- Contract Management
- Fixed Assets
- General Ledger
- Human Resources
- Licensing
- Land Management (Addresses/Parcels/Zoning/Attributes)
- Permitting/Inspections
- Payroll
- Project Accounting
- Purchasing (Requisitions and Purchase Orders)
- Utility Billing

The following modules are not being used within Tyler Eden:

- Code Enforcement (currently used within Cityworks PLL)
- Inventory Control

Exhibit 2 identifies the third-party applications the City expects to be interfaced to the new system/solutions.

Exhibit 2. Proposed System/Solutions Interfaces

Data Type	Third-Party Application	Interface With	Description
Address Data	GIS	All Modules that use addressing	Ability to use our existing GIS for Parcel/Address information within any module that uses addressing
Asset Data	Faster	Fixed Assets	Ability to track expenses and related information to vehicle assets maintained in Faster
Asset Data	GIS	Fixed Assets	Ability to track expenses and related information to infrastructure assets maintained in GIS
CalCard	US Bank	Accounts Payable	City issued Pay Cards (Credit Card). Ability to import statement transactions, link transaction to a specified vendor, and allow employee to code to a GL account
Checks	UB Bank	Accounts Payable, Payroll	Ability to generate Positive Pay file that can be sent to US Bank. Ability to import file to reconcile cleared checks
Meters	Aquahawk	Utility Billing	Ability to export meter details to upload to Sensus that links meters to a UB account. Ability to import meter read files from Sensus
Meters	Cityworks	Utility Billing	Bi-Directional data. Water Meter requests generated in new system creates a Service Request in Cityworks. Updates from Cityworks get pushed back
Meters	Sensus	Utility Billing	Ability to export meter details to upload to Sensus that links meters to a UB account. Ability to import meter read files from Sensus
Municiple Code	qcode	Code Enforcement	Ability to query directly from Code Enforcement module to the maintained Municiple Code website (qcode.us/codes/woodland/). Ability to import the code text into the Code Enforcement case

Payment Data	Civic Rec	General Ledger or Accounts Receivable	Parks and Recreation payments. Ability to import file with transaction details, including GL account
Payment Data	Duncan Solutions	General Ledger or Accounts Receivable	Parking Citation Payments. Ability to import file with transaction details including GL account
Payment Data	US Bank Lock Box	Utility Billing	Bill Pay and Check Processing. Import daily files into Utility Billing
Payroll Data	CalPERS	Payroll	CalPERS Reports. Ability to export and upload
Payroll Data	EDD	Payroll	EDD Reports. Ability to export and upload
Payroll Data	FTB	Payroll	FTP Reports. Ability to export and upload
Payroll Data	ICMA/AIG	Payroll	Deferred Comp/Retiree Health Savings Accounts. Ability to export and upload
Payroll Data	IRS	Payroll	IRS Reports. Ability to export and upload
Payroll Data	PARS	Payroll	PARS Reports. Ability to export and upload
Timekeeping	PlanIT	Payroll	Police Department uses Telestaff for scheduling. Ability to export pay period details and import to Payroll
Timekeeping	Telestaff	Payroll	Fire Department uses Telestaff for scheduling. Ability to export pay period details and import to Payroll.

Exhibit 3 identifies the City's current technology standards. The proposed system must be compatible with the existing technical environment or accessible from it. Proposers will be required to confirm conformance to these requirements or clearly articulate proposed alternatives.

Exhibit 3. Technology Standards

Technology	Current Standard
Database(s)	Microsoft SQL
Server OS	Windows Server 2016/2019
Desktop OS	Windows 10
Technology	**Current Standard**
Server Hardware	Dell Hosts running VMWare
Desktop Hardware	Dell Desktops / PCoIP Zero Clients
Laptop/Mobile Hardware	Dell Laptops / Apple iPads
Browsers	Firefox and Chrome
Email Server/Client	Microsoft Exchange 2016/2019
Virtual Environment	VMWare vSphere
Storage Area Network	HPE Nimble
Active Directory	Window 2016/2019
VPN	Netmotion and Palo Alto Global Protect
Scanners	Canon DR-x
Printers	Various
Internet Bandwidth	Wave Broadband Fiber, 1 Gb

Exhibit 4 provides information regarding key statistics (approximations) to aid the Proposers in preparation of their proposed solutions and pricing.

Exhibit 4. Key Statistics

Functional Area	Volume/Statistics	Frequency (if applicable)
Human Resources		
Recruitments	Approximately 7	Per month
MOU	10	N/A
FTE	291	N/A
PTE	Variable (100-300)	Higher in Summer
Position Classifications	175	N/A
Employee action Forms (e.g. new hire, pay changes, employee separation, misc. pay assignments and status, etc	High volume. Forms are used for any position or pay related change	N/A
Finance		
Purchase Orders	1263 (FY 20 total)	Generated Daily
Invoices	15,331 (FY 20 total)	Processed Weekly
Journal Entries	56393 (FY 20 total)	Processed Daily
# of Funds	131	N/A

Miscellaneous Bills	3,664 (FY 20 total)	N/A
# of Bank Accounts	1	N/A
Payroll Checks Issued	5,067 (FY 20 total) Dir Deposit 4,436 Manual 631	Monthly
Capital Projects (Active)	86	N/A
Vendors (Active)	4,815	N/A
Business Licenses (Active)	4,046	N/A
Utility Billing		
Accounts	16,665	N/A
Shut Offs	2767 (FY 20 Total)	Monthly
Functional Area	**Volume/Statistics**	**Frequency (if applicable)**
Land Management		
Business License: New Requests, Renewals, Delinquent renewal notices	8303	Annually
Permits		
Building	2882	Annually
Cannabis	1	Annually
Encroachment	809	Annually
Fire Hydrant	30	Annually
Fire Permits	237	Annually
Planning	53	Annually
Transportation	220	Annually
Building		
Building Inspections	13,222	Annually

4 ERP System/Best of Breed Solution(s) Requirements

1.9 Required Modules

The City is seeking a highly integrated system that can serve as many of the City's various department needs as possible. Best of breed solutions must meet the mandatory needs of the product type. Mandatory solution modules include the following:

Finance

- General Ledger/Accounting
- Treasury Management
- Budgeting Control and Preparation
- Loan Servicing
- Procurement/Purchasing
- Contract Management
- Project/Grant Management
- Accounts Payable
- Accounts Receivable/Miscellaneous Billing
- Payroll Processing
- Fixed Assets
- Point of Sale (Cashiering)
- Utility Billing
- Optional Non-Mandatory functionality:
    - Fleet Lease Management
    - Fleet Replacement Management
    - Facility Replacement Management
    - Infrastructure Replacement Management

Human Resources

- Position Control
- Employee Master File
- Benefits Administration
- Leave Administration
- Training and Certification
- Performance Reviews
- Personnel Actions
- Employee Self-Service
- Pay Administration
- Time and Attendance
- Optional Non-Mandatory functionality:
    - Recruitment
    - Onboarding
    - Separation/Off boarding

Community Development

- Land Management
  - Planning
  - Engineering
  - Plan Check
  - Permits
  - Inspections
  - Customer/Citizen Access
- Business License
- Optional Non-Mandatory functionality:
  - Code Enforcement

1.10 Key Functionality

The City is interested in adopting modern, automated tools that support financial, land management, and human resource best practices. Key functionality in these areas would include, but not be limited to: dashboards, mobility, employee portal with electronic time reporting, vendor portal, workflow, reporting, etc. The specific functionality required can be found in Appendix A - Requirements.

1.11 Implementation Timeline

The City is seeking guidance from the Proposers based on their experience for the recommended module phasing and timing. Proposers should clearly communicate all key assumptions along with their proposed schedule. The City is open to suggestions for how best to implement the Proposer's solution. The Proposer's recommended implementation timeline should be clearly articulated in their proposal response as Section 6 – Implementation Approach and Work Plan.

1.12 Requirements and Data Conversion

Proposers must respond to the requirements included in Appendix A - Requirements. The City will incorporate the requirements and the selected Proposer's responses into the final contract that is executed between the parties. Proposers must respond with experience with data conversion from the Tyler Eden ERP.

5 Proposal Submission Requirements

1.13 General Instructions

Proposals should be prepared simply and economically and provide a straightforward, concise description of the Proposer's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

Proposals must be organized consistent with the outline provided in this section. Proposers must follow all formats and address all portions of the RFP set forth herein, providing all information requested. Proposers may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all the City's information requirements.

1.14 Proposal Format and Content

Information must be structured, presented, and labeled in the following manner:

- Cover Letter
- Table of Contents
- Section 1 – Executive Summary
- Section 2 – Company Background
- Section 3 – Company Qualifications
- Section 4 – References
- Section 5 – Proposed Solution
- Section 6 – Implementation Approach and Work Plan
- Section 7 – Support and\or Hosting
- Section 8 – Pricing
- Section 9 – Software Licensing and Maintenance Agreements

Information should be prepared on standard 8½" x 11" paper and printed on two sides.

Failure to follow the specified format, to label the responses correctly, or to address all the subsections may, at the City's sole discretion, result in the rejection of a proposal.

Cover Letter

The proposal must include a cover letter that provides the following:

- Proposer's legal name and corporate structure, including the state incorporated in.
- Proposer's primary contact to include name, address, phone, and email.
- Solution name, and version.
- Identification of subcontractors (if any) and scope of work to be performed by subcontractors.
- Identification of any pending litigation against the Proposer.

- Disclosure of any bankruptcy or insolvency proceedings in the last ten (10) years.
- Statement indicating the proposal remains valid for at least 150 days.
- Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g. employment by the City).
- Statement of acknowledgement that the City's RFP documents have been reviewed and accepted with or without exception. If exceptions are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no exceptions are noted, the City will assume that the Proposer can perform all normal tasks and services without reservation or qualification to the contract.
- Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it.

The Cover Letter should be concise and brief and not exceed three (3) pages unless a Proposer's exceptions to the City's legal documents require it.

Table of Contents

All sections should be identified and pages consecutively numbered.

Section 1 - Executive Summary

This section of the proposal should provide a brief and concise synopsis of Proposer's proposal and a description of the Proposer's credentials to deliver the services sought under the RFP. This is to include the name and version of the solution proposed, and confirmation that it is a SaaS solution. The Executive Summary should not exceed three (3) pages.

Section 2 – Company Background

This section of the proposal should identify the following:

2.1 – A brief description of the Proposer's background.
2.2 – Identify the location of headquarters, technical support, and field offices and the location of the office that would service the City.
2.3 – Identify Proposer's annual company revenues and profit for the last three company fiscal years.

The Background section should not exceed three (3) pages.

Section 3 – Company Qualifications

In this section of the proposal, the Proposer should identify company qualifications and experience in implementing solutions like what the City is seeking:

3.1 – Describe the Proposer's familiarity with public sector systems and associated business processes, and experience with the requirements of municipalities
3.2 – Identify the Proposer's existing client base including the number of existing clients using the version/release of the software being proposed. Specifically identify experience with similar sized California municipalities
3.3 – Provide a list of all clients using the proposed solution

The Company Qualifications section should not exceed three (3) pages.

Section 4 - References

The Proposer must provide at least five (5) references with at least three (3) of the references for systems that have been implemented in the last five years. References should be for the same product version/release as being proposed. The City prefers references from California municipalities of similar size and complexity to the City. For each reference, Proposer must provide the following information:

4.1 - Name and contact information (i.e. name, title, address, phone, and email)
4.2 - Brief project description, including identifying the software version, modules, and interfaces implemented
4.3 - Implementation timeline, go live date, original cost, and actual cost

Section 5 - Proposed Solution

In this section of the proposal, the Proposer should describe the proposed solution by providing the following:

5.1 – Solution Overview

- Name and origin of solution
- Release history and current release being proposed
- Proposed modules
- Mobile capabilities of the proposed modules
- Roles and responsibilities of Proposer vs. the City

5.2 – Service Level Agreements (SLA's)

- Describe supported SLA options (e.g. reliability, availability, performance, issues, requests, system response time, etc.)

5.3 – Response to Appendix A – Requirements:

- The City will provide a copy of RFP Appendix A in MS Word. To address this section, Proposers should use that file to address each requirement in Appendix A. Please see Appendix A for additional instructions.

The following questions in section 5 are for SaaS only solutions.

5.4 – Application Integration/Interface

The required integration/interfaces and the relevant data to be sent (including the direction and frequency) are identified in Figure 1 and Table 3 in RFP Section 3. Please describe the following for each specific integration/interface:

- Proposer's integration/interface solution (web services, Application Programming Interfaces (APIs), etc.)
- Data availability/transfer (real-time, nightly, etc.)
- How Proposer will ensure data security
- The involvement, if any, that is required from the owners of the applications to be integrated/interfaced to the system(s)
- The involvement, if any, that is required from the City of the applications to be integrated/interfaced to the system(s)
- If Proposer has previous experience developing/implementing the relevant integration/interface

5.5 – Data Storage and Backup

- Describe approach to data storage
- Describe data backup process
- Describe the network bandwidth required between the City and hosting facilities
- Describe what options are available for dedicated bandwidth (if available)
- Describe scalability options for computing power (CPU, RAM, and storage)

5.6 – Data Access and Security

- Describe how data access is managed
- Describe the environment (single or multi-tenant)
- Describe how environment security is managed
- If a multi-tenant environment, how is the data segregated?
- If a multi-tenant environment, how is security managed?

5.7 – Business Continuity and Disaster Recovery

- Describe approach to business continuity & disaster

5.8 – Transition

- Describe proposed exit strategy at contract transition

Section 6 - Implementation Approach and Work Plan

The Proposer should describe the proposed implementation approach to include the following:

6.1 – Provide a Project Schedule that identifies implementation tasks, activities, dates, durations, resources, deliverables, and milestones (ensuring that the development, testing, and implementation of all required integrations/interfaces is accounted for)

6.2 – Provide a project organization chart that identifies proposed staff – in response to this, also include a discussion of how Proposer will address any issues the City may have with staff

6.3 – Provide bios for key staff

6.4 – Provide a staffing matrix (as shown in Exhibit 5) that identifies the specific roles/ responsibilities to be filled by Proposer or subcontractor staff versus those to be filled by City staff. As part of this matrix, identify the estimated level of effort for each staff person and when that person would be required (what part of implementation).

Exhibit 5. Proposed Staffing Matrix

Task	Task Start - Task End	Vendor Staff (Role)	City Staff (Role)	Task Hours

6.5 – Describe Proposer's project management methodology – this should be in the form of a Project Plan that addresses the Proposer's approach to Change Management, Risk Management, Issues Management, Communications Management, etc.

6.6 – Describe the roles and responsibilities of City staff during implementation and provide an estimated level of effort (%) for the City versus the Proposer

6.7 – Describe the conversion strategy, including what data should be converted, the number of years of data to convert, and the conversion methodology (extract, transform, and load).

6.8 – Describe Proposer's training methodology and how you ensure users are prepared to use the proposed solution; include description of approach to training for different learning styles (classroom, online, hands-on, etc.). Proposers must describe the training to be provided for each specific module being proposed.

6.9 – Describe your testing methodology to include the criteria and methods to ensure successful completion of user acceptance testing prior to Go Live

The Implementation Approach and Work Plan section should not exceed fifteen (15) pages (excluding the project schedule).

Section 7 – Support

In this section of the proposal, the Proposer should address the following:

7.1 – Describe ongoing support services including help desk processes and procedures, support hours (in Pacific Time), escalation procedures, and response time commitments

7.2 – Describe the frequency that application patches and releases have been made available within the past two (2) years.

7.3 – Describe how you would complete a Post-Implementation Evaluation Report (PIER) that evaluates whether project objectives were met, determines how effectively the project was run, and ensures that the organization gets the greatest possible benefit from the project, and a full week of follow-up training for each separate implementation: FIN, HR/Payroll, etc.

7.4 – Describe any solution user groups and/or conferences

The Support section should not exceed five (5) pages.

Section 8 – Pricing

The City seeks a clear and comprehensive understanding of all costs associated with the implementation and ongoing maintenance of the proposed system.

To address pricing, the City will provide a copy of RFP Appendix B – Price Sheets - in MS Excel.
To address this section, Proposers should complete all the price sheets in Appendix B.

Proposers must itemize all costs associated with the implementation and ongoing maintenance. In addition to the evaluation criteria in Section 6 of this RFP, the City will evaluate information based on the "Total Cost to Implement (TCI)" and the "Total Cost to Operate (TCO)." TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus five (5) years of annual maintenance fees.

Proposers must identify all costs required to complete a successful implementation to include:

- Licensing and Costs
- Services
- Project management
- Implementation, installation, configuration, and testing
- Data conversion and migration
- Interface development
- Training and Documentation
- Travel

If proposing a hosted solution the hosting costs should clearly identify the annual costs for five years inclusive of:

- Hosting
- Support
- PIER and additional training

The City will evaluate Proposer price information based solely off the information provided in Appendix B. Appendix B includes space for Proposers to identify any assumptions or comments that will ensure the City understands what is being proposed.

Section 9 – Software Licensing and Maintenance Agreements

To address this section, the Proposer must provide any software licensing and maintenance agreements that will be required to implement the Proposer's solution.

6 Proposal Evaluation

A City Committee will review all information to determine which Proposers have qualified for consideration. The evaluation will include at least an initial review and a subsequent detailed review. The initial review will evaluate all submissions for conformance to stated specifications to eliminate all responses that deviate substantially from the basic intent and/or fail to satisfy the mandatory requirements. Only those that meet or exceed the intent of the mandatory requirements will be further evaluated. Submitted proposals will be evaluated on the following criteria:

- Quality, clarity, and responsiveness of proposal
- Ability to meet the needs of the City
- Well thought out timeline and roadmap to support go live with a phased approach
- Proven technical ability to design, install, and support the proposed system
- Demonstrated ability to work in a cooperative and collaborative manner with clients
- Anticipated value and price
- Perceived risk or lack thereof
- Company financial stability
- References for each application proposed
- Results of interviews, demonstrations, and site visits
- Ability to prepare and execute a contract in a timely manner
- Commitment to continually evolving the system to remain current with evolving best practices

The City reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the City and, if held, shall be after initial evaluation of proposal is complete. If clarifications are made as a result of such discussion, the Proposer shall put such clarifications in writing.

7 RFP Terms and Conditions

A. Collusion

By submitting a response to the RFP, each Proposer represents and warrants that its response is genuine and not made in the interest of or on behalf of any person not named therein; that the Proposer has not directly induced or solicited any other person to submit a sham response or any other person to refrain from submitting a response; and that the Proposer has not in any manner sought collusion to secure any improper advantage over any other person submitting a response.

B. Gratuities

No person will offer, give, or agree to give any City employee or its representatives any gratuity, discount or offer of employment in connection with the award of contract by the City. No City employee or its representatives will solicit, demand, accept or agree to accept from any other person a gratuity, discount or offer of employment in connection with a City contract.

C. Required Review and Waiver of Objections by Proposers

Proposers should carefully review this RFP and all attachments, including but not limited to the Standard Professional Services Agreement, for comments, questions, defects, objections, or any other matter requiring clarification or correction (collectively called “comments”). Comments concerning RFP objections must be made in writing and received by the City no later than the "Deadline for Proposal Questions" detailed in Table 1 - RFP Timeline. This will allow issuance of any necessary amendments and help prevent the opening of defective information upon which contract award could not be made.

Protests based on any objection will be considered waived and invalid if these faults have not been brought to the attention of the City, in writing, by the Deadline for Proposal Questions.

D. Nondiscrimination

No person will be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the City’s contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or California State Constitutional or statutory law; nor will they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the City or in the employment practices of the City’s contractors. Accordingly, all Proposers entering into contracts with the City will, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

E. Proposal Preparation Costs

The City will not pay any costs associated with the preparation, submittal, or presentation of any proposal.

F. Proposal Withdrawal

To withdraw a proposal submitted prior to the Deadline for Proposal Submissions, the Proposer must submit a written request, signed by an authorized representative, to the RFP Coordinator (Section 1.4). After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time up to the Deadline for Proposal Submissions.

G. Proposal Errors

Proposers are responsible for all errors or omissions contained in their information. Proposers will not be allowed to alter proposal documents after the Deadline for Proposal Submission.

H. Incorrect Proposal Information

If the City determines that a Proposer has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the Proposer knew or should have known was materially incorrect, that proposal will be determined non-responsive, and the proposal will be rejected.

I. Assignment and Subcontracting

The Contractor may not subcontract, transfer, or assign any portion of the contract without prior, written approval from the City. Each subcontractor must be approved in writing by the City. The substitution of one subcontractor for another may be made only at the discretion of the City and with prior, written approval from the City.

Notwithstanding the use of approved subcontractors, the Proposer, if awarded a contract under this RFP, will be the prime contractor and will be responsible for all work performed and will be responsible for all costs to subcontractors for services provided by the Proposer. The Proposer is prohibited from performing any work associated with this RFP or using contractors for any service associated with this RFP offshore (outside the United States).

J. Right to Refuse Personnel

The City reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors. The City reserves the right to interview and approve all Proposer staff members. Proposer's staff may be subject to the City's background and drug testing processes at any time.

K. Proposal of Additional Services

If a Proposer indicates an offer of services in addition to those required by and described in this RFP, these additional services may be added to the contract before contract signing at the sole discretion of the City.

L. Licensure

Before a contract pursuant to this RFP is signed, the Proposer must hold all necessary, applicable business and professional licenses. The City may require any or all Proposers to submit evidence of proper licensure.

M. Conflict of Interest and Proposal Restrictions

By submitting a response to the RFP, the Proposer certifies that no amount will be paid directly or indirectly to an employee or official of the City as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP will be construed to prohibit another governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

Any individual, company, or other entity involved in assisting the City in the development, formulation, or drafting of this RFP or its scope of services will be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

N. Contract Negotiations

After a review of the information and completion of the demonstration and proof-of-capabilities (POC), the City intends to enter into contract negotiations with the selected Proposer. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the City will open negotiations with the next ranked Proposer.

O. Execution of Contract

If the selected Proposer does not execute a contract with the City within fifteen (15) business days after notification of selection, the City may give notice to that service provider of the City's intent to select from the remaining Proposers or to call for new information, whichever the City deems appropriate.

P. Right of Rejection

The City reserves the right, at its sole discretion, to reject any and all information or to cancel this RFP in its entirety.

Any proposal received which does not meet the requirements of this RFP may be considered nonresponsive, and the proposal may be rejected. Proposers must comply with all the terms of this RFP and all applicable State laws and regulations. The City may reject any proposal that does not comply with all the terms, conditions, and performance requirements of this RFP.

Proposers may not restrict the rights of the City or otherwise qualify their information. If a Proposer does so, the City may determine the proposal to be a nonresponsive counter offer, and the proposal may be rejected.

The City reserves the right, at its sole discretion, to waive variances in technical information provided such action is in the best interest of the City. Where the City waives minor variances in information, such waiver does not modify the RFP requirements or excuse the Proposer from full compliance with the RFP. Notwithstanding any minor variance, the City may hold any Proposer to strict compliance with the RFP.

Q. Disclosure of Proposal Contents

All information and other materials submitted in response to this RFP procurement process become the property of the City. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process. Upon the completion of the evaluation of information, the information and associated materials will be open for review by the public to the extent allowed by the California Public Records Act, (Government Code Section 6250-6270 and 6275-6276.48). By submitting a proposal, the Proposer acknowledges and accepts that the contents of the proposal and associated documents will become open to public inspection.

R. Proprietary Information

The master copy of each proposal will be retained for official files and will become public record after the award of a contract unless the proposal or specific parts of the proposal can be shown to be exempt by law (Government code §6276). Each Proposer may clearly label part of a proposal as "CONFIDENTIAL" if the Proposer thereby agrees to indemnify and defend the City for honoring such a designation. The failure to so label any information that is released by the City will constitute a complete waiver of all claims for damages caused by any release of the information.

S. Severability

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of the City and Proposers will be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

T. RFP and Proposal Incorporated into Final Contract

This RFP and the successful proposal will be incorporated into the final contract.

U. Proposal Amendment

The City will not accept any amendments, revisions, or alterations to information after the Deadline for Proposal Submission unless such is formally requested, in writing, by the City.

V. Consultant Participation

The City reserves the right to share, with any consultant of its choosing, this RFP and proposal responses in order to secure a second opinion. The City may also invite said consultant to participate in the Proposal Evaluation process.

W. Warranty

The selected Proposer will warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP, demonstrated in both the software demonstration and subsequent proof-of-capabilities. In addition, the selected Proposer will warrant that it rightfully possesses the right, title, or interest to the intellectual property (IP) necessary for any underlying technology implicated by or involved with their proposed technological solution. Further, that the requirements as stated in this RFP will become part of the selected Proposer's license and the Proposer will warrant to the requirements. The selected Proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all application modules included in the implementation.

X. Rights of the City

The City reserves the right to:

- Make the selection based on its sole discretion
- Reject any and all information
- Issue subsequent Requests for Proposal
- Postpone opening proposals, if necessary, for any reason
- Remedy errors in the Request for Proposal process
- Approve or disapprove the use of specific subcontractors
- Negotiate with any, all, or none of the Proposers
- Accept other than the lowest offer
- Waive informalities and irregularities in the proposal
- Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the City

An agreement will not be binding or valid with the City unless and until it is approved by the City Council and executed by authorized representatives of the City and of the Proposer.

Y. Bid Appeal Procedure

A Proposer who timely submitted a Proposal may appeal pursuant to the appeal procedures applicable to this RFP as follows:

- Any Proposer who has timely submitted a Proposal may appeal the recommended award by filing an appeal which complies with this RFP Section **within (5) business days after the Announcement of the Selected Proposer Date listed above in RFP Section 1.3 (as amended by written addendum, if any)**. Postmarking by the due date will not substitute for actual timely receipt.
- The appeal must be based on one or more of the following grounds:
- The selected Proposer does not meet the minimum qualifications stated in the RFP or its exhibits;

- The selected Proposal is nonresponsive in that it fails to offer all the services requested in the RFP that have not either been modified or waived by the City;
- The RFP or its exhibits were ambiguous or inconsistent in a materially significant way and such ambiguity or inconsistency gave the selected Proposer an unfair competitive advantage; or
- The selection process was unfair in that the City failed to follow the stated evaluation process which gave an unfair competitive advantage to the selected Proposer and the selection process was not modified or waived pursuant to the RFP.
- The City will consider many factors when making its selection and thus no single factor or criteria can outweigh all the others combined. As such, the following are generally not grounds for a valid appeal:
- The appealer feels they have more experience than the selected Proposer;
- The appealer feels they are better qualified than the selected Proposer; or
  The appealer offered a lower price for the same services.
- The appeal shall contain a full and complete written statement specifying in detail the grounds for the appeal and the facts supporting the appeal. The appeal shall make specific reference to the applicable sections of the RFP, its exhibits and/or sections of the selected Proposal.
- The appeal shall be emailed, or hand delivered to the RFP Coordinator at the address and email listed in RFP Section 1.4 above with a copy to the selected Proposer.
- The selected Proposer shall respond in writing to the allegations contained in the appeal within three (3) business days of receipt thereof. The response shall be emailed, or hand delivered to RFP Coordinator at the address and email listed in RFP Section 1.4 above with a copy to the appealer.
- The City Attorney will review the appeal, the response and promptly initiate an investigation. The appealer and all Proposers shall cooperate with any inquiries from the City Attorney.
- At the conclusion of the investigation, the City Attorney shall issue a letter to the appealer with a copy to the selected Proposer regarding their findings. The role of the City Attorney is to determine whether City staff followed the evaluation process outlined in the RFP and whether the RFP materials were materially ambiguous or inconsistent so as to give the selected Proposer an unfair economic advantage. If necessary, the City Attorney can recommend steps to correct the error; recommend that City stop negotiations with the selected Proposer and start negotiations with the next highest scoring Proposer; reject all Proposals and restart the RFP process or such other remedy as may be in the City's best interest.
- It is **not** the role of the City Attorney to second guess the City as to the relative strengths or weaknesses of the submitted Proposals. The City Attorney will not substitute his/ her judgment for that of the City so long as the RFP process has been substantially followed.
- If the contract requires City Council approval, then an appealer who is dissatisfied by the finding of the City Attorney shall have an opportunity to appear and be heard by the City Council at the public hearing to award the contract. The City Council's decision to award or not award the contract is final.

Appendix A – Requirements

See separate Word document.

The document may be downloaded at:
https://www.cityofwoodland.org/DocumentCenter/View/6516/Appendix-A-Requirements

Appendix B – Price Sheets

See separate Excel document.

The document may be downloaded at:
https://www.cityofwoodland.org/DocumentCenter/View/6514/Appendix-B-Price-Sheets

Appendix C – City Standard Agreement

See separate PDF document.
The document may be downloaded at:
https://www.cityofwoodland.org/DocumentCenter/View/6515/CITY-OF-WOODLAND-Sample-Contract

http://cityofwoodland.org/Bids.aspx