

REQUEST FOR PROPOSAL FOR

ERP Software and Implementation Services



RELEASE DATE: 9/16/2019

DATE/TIME DUE: 10/11/2019, 5:00 p.m. CT

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1.0 General Information

Polk County is located in the U.S. state of Minnesota. Its county seat is Crookston, and its largest community is East Grand Forks. Polk County is included in the Grand Forks, ND-MN Metropolitan Statistical Area.

Polk County, population 31,416, is a very progressive, ag-based county located in northwest Minnesota. According to the Minnesota Department of Agriculture it has ranked No. 1 in three areas of crop production - spring wheat, dry beans and sugar beets. The county hosts two of American Crystal Sugar Company's processing plants, the University of Minnesota-Crookston and Northland Community Technical College (East Grand Forks) campuses, the Glacial Ridge National Wildlife and Rydell National Wildlife refuges, two county park-campgrounds, and several very popular recreational lakes. County operations and services are provided by about 300 of the very finest employees through 17 different departments: Administration, Assessor, Attorney, Auditor, Environmental Services, Human Resources, Information Systems, Finance, Facilities, Incinerator, License Center, Public Health, Public Works, Recorder, Sheriff's Office, Social Services and Veteran's Services.

The governing board is the five-member Polk County Board of Commissioners.

2.0 RFP Introduction and Overview

2.1 Background

The County of Polk in Minnesota is accepting proposals from qualified software firms (Vendor, Proposer or Offeror) to provide a fully integrated Enterprise Resource Planning (ERP) system or best-of-breed solutions to meet the County's requirements for Financials, Human Resources and Payroll with an anticipated implementation project start during the first half of 2020.

Polk County is seeking to consolidate its main accounting software, Integrated Financial System (IFS), as well as other accounting and related support software used across the County to eliminate manual documentation and procedures, reduce the cost of maintaining different software solutions, streamline processes and allow for a more efficient workflow.

The County operates under a fiscal year ending December 31st.

2.2 Scope

Software Modules - the County requires a system with the following fully integrated modules: general ledger, budget management, accounts payable, accounts receivable, project accounting, fixed assets, inventory, bank reconciliation, human resources and payroll, including employee entry of time and attendance and employee self-service. The County is also seeking an efficient method for property management where the County has individual items within a group of assets to track (such as office furniture) that may or may not meet the fixed asset capitalization threshold.

Integrations with key existing systems will be included in scope, see key requirements below for additional detail.

Services - it is the intention of Polk County that the selected Vendor shall provide services in the area of system design and set up, software installation, integration design and build, training, project management, technical and post implementation support. For on premise solutions, all software or hardware must be loaded and configured on-site in Crookston, MN in Polk County. Vendor is expected to be able to provide on-site support, as needed, during the project.

Data conversion will be the responsibility of the Polk County IS Department, with technical support required on an as needed basis from legacy and new ERP systems technical resources. If the selected ERP vendor is unable for any reason to provide complete technical documentation and support sufficient for the IS Department to successfully perform legacy data migration from legacy system to new ERP system, then the vendor will need to perform all data import functions to the new ERP system.

Other product offerings - Polk County is interested in learning more about other product offerings that proposers believe Polk County might be interested in but not specifically included in the scope of this proposal. For those product offerings, please provide a short description of what is available from your firm.

2.3 System Requirements

Detailed Key System Requirements by Financial module as well as Human Resources, Payroll and employee time and attendance and self-service are critical components of the RFP response and are located in Appendix C. The below provides an overview of additional requirements needed for a complete RFP response.

Polk County will require the following integrations between existing systems and the new ERP system, note that these are a high-level description and additional detail will need to be gathered for integration data planning and design:

1. **Kronos** - Polk County has invested in an implementation of Kronos and ideally would like the consideration of Kronos to be included in the proposed fully integrated solution, dependent upon whether the new system can fully meet the County's requirements.
2. **Social Services Information System (SSIS)** - Two-way integrations required, including entering new vendors in ERP to update SSIS, batch creation in SSIS to import it accounting system for check generation, then the batch is imported back to SSIS for the record keeping. Accounting system maintains the warrant numbers and deducts the funds from the proper accounts from the budget.
3. **Phoenix System** - tracks diesel and gas inventory and sales in the Highway Department that will need to update to ERP system.
4. **Aumentum** - tax receipts tracking and collection to ERP system.
5. **Web Order**- parks scheduling, sign up and payment completed online and needs to update ERP system.
6. **Availity** - All billings that are not eligible for grant reimbursement are billed to insurance via Availity, an intermediary data exchange SaaS. Monies are received through the clearing account.
7. **Incinerator** - software program that calculates tip fees needs to integrate with Accounts Receivable and Cash Receipts.

Polk County will evaluate all options including a premised-based option where the software and data will reside on a server(s) at our facility and a "Cloud" or "Hosted" environment. Please supply software and services pricing with all these options in mind. If a hosted solution is proposed, please include a detailed list of all recommended hardware (routers e.g.) and 3rd Party software (Citrix, VPN e.g.) requirements. Also include a budget estimate for this hardware and Third-Party software components. Polk County reserves the right to procure these components and services on its own if it decides upon a hosted solution.

2.4 System Users

Polk County anticipates having 16 full time users and an additional 12 users that will need access during the budget season. The number of total users entering time and attendance is 334.

2.5 RFP & Proposed Implementation Project Timeline

Polk County is seeking proposals for integrated ERP system that will include software implementation services ongoing training and support. Below is an overall timetable that has been established for this RFP process and start of the implementation project.

Timeline	
RFP Response Period	9/16/2019 - 10/11/2019
Vendor and Software Evaluations Software Demonstrations	10/14/2019 - 11/30/2019
Projected Decision Timeframe	12/1/2019 - 12/31/2019
Estimated Project Start	First half of 2020
Estimated Project Go-Live	To be established *

** To be set in accordance with selected vendor recommendations*

2.6 Inquiries

Inquiries concerning this procurement including questions related to technical issues are to be directed to:

Geniene B. Scherer, CPA, Senior Manager, Abdo, Eick & Meyers, LLP
 Email: geniene.scherer@aemcpas.com
 Phone: 952-935-6893

All questions concerning the RFP must reference the RFP page number, section heading and paragraph. Please state the question as concisely as possible. All questions regarding this RFP must be received via email between September 16, 2019 and October 11, 2019. Those inquiries, questions or clarifications submitted after this date will not be answered.

Proposers are directed specifically to not contact any other the staff other than specified personnel identified above for any purpose. Unauthorized contact of any personnel may be cause for rejection of the Proposer's RFP response.

2.7 Selection Process

At its discretion Polk County may require Proposers at their own costs to provide software demonstrations. These demonstrations provide an opportunity for the Proposers to clarify the proposal for Polk County. Polk County will schedule any such demonstrations.

Polk County may request clarification and conduct discussions with any Proposer who submits a proposal.

The award/negotiation sequence will be based on a selection methodology established by Polk County. Once the proposals are opened, Polk County will evaluate each proposal taking into consideration the criteria and methodology stipulated in this RFP. Polk County will be the sole judge in evaluation considerations and may make an award to the bidder(s) who submit the proposal judged by Polk County to be most advantageous. A recommendation as to the proposal that is believed to be in the best interest of Polk County will be presented as appropriate to other interested parties.

3.0 Response Requirements and Conditions

3.1 Proposal Response Instructions

The Proposal must be **received no later than Friday, October 11th, 2019, 5:00 pm CT** at the following physical or email address:

Geniene B. Scherer, CPA, Senior Manager, Abdo, Eick & Meyers, LLP
5201 Eden Avenue St. 250
Edina, MN 55436
Email: geniene.scherer@aemcpas.com

If in physical form, proposals must be submitted in sealed packages with the following information clearly marked on the outside of each package:

- Name of responder
- Project title: **Polk County ERP System Proposal**

Failure to comply with the requirements of this RFP may result in disqualification.

Facsimile bids will not be considered. Proposers shall have sole responsibility for delivery of bids on time and to the proper location. Proposals received subsequent to the time and date specified above will not be considered.

3.2 Rejection of Proposals

Polk County reserves the right to reject any and all proposals received in response to this proposal offering, and to waive any informality or irregularities in this proposal offering. The award of a contract shall be at the sole discretion of Polk County. The award will be made to the responsible Offeror whose proposal is determined to be the most advantageous to Polk County, taking into consideration the evaluation factors set forth in this proposal package. Polk County may make the award without further discussion of the Proposals submitted. Therefore, the proposal should be submitted initially on the most favorable terms, which the Offeror can propose with respect to price, product, service, and technical capability. The contents of the proposal of the selected Offeror will become the basis for Polk County and the Offeror's contractual obligations when the award is made.

3.3 Withdrawal of Proposals

- All proposals submitted shall be valid for a period of one-hundred eighty (180) calendar days from the date of the proposal opening. Proposals may not be withdrawn for a period of 180 days after the time set for the bid opening.
- Proposals may be withdrawn prior to the proposal due date and time. Such requests must be in writing.

3.4 Proposal Costs

Those submitting proposals do so entirely at their sole cost and expense. There is no expressed or implied obligation by Polk County to reimburse any individual or firm for any costs incurred in preparing or submitting proposals providing additional information when requested by Polk County or for participating in any selection interviews or product demonstrations.

3.5 Local State and Federal Compliance Requirements

Proposers shall comply with all local, state and federal ordinances, statutes, regulations, directives and orders as applicable to this bid and subsequent contract(s) including but not limited to:

- Equal Employment Opportunity (EEO) in compliance with Executive Order 11246 as amended and applicable to this contract.
- Occupational Safety and Health Act (OSHA) as applicable to this contract.
- Debarment and Suspension (Executive Orders 12549 and 12689) – A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

3.6 Insurance

Successful bidder shall not commence work under the contract until proof of all required insurance has been submitted to Polk County and approved by Polk County.

General Liability

The Vendor shall at all times during the term of any contract carry, maintain, and keep in full force and effect, a policy or policies of Commercial General Liability Insurance, with minimum limits of one million dollars (\$1,000,000) for each occurrence and two million dollars (\$2,000,000) general aggregate for bodily injury, death, loss or property damage for products or completed operations and any and all other activities undertaken by the Vendor in the performance of any contract.

Professional Liability

The Vendor shall at all times during the term of any contract, carry, maintain, and keep in full force and effect a policy or policies of professional liability insurance with a minimum limit of one million dollars (\$1,000,000) per claim and aggregate for errors and/or omissions of the Vendor in the performance of any contract.

Automobile Liability

Vendor shall at all times during the term of any contract obtain, maintain, and keep in full force and effect, a policy or policies of Automobile Liability Insurance, with minimum of one million dollars (\$1,000,000) per claim and occurrence and two million dollars (\$2,000,000) in the aggregate for bodily injuries or death of one person and five hundred thousand dollars (\$500,000) for property damage arising from one incident.

Worker's Compensation

The Vendor agrees to maintain in force at all times during the performance of work under any contract worker's compensation insurance as required by the law. The Vendor shall require any subcontractor similarly to provide such compensation insurance for their respective employees.

Primary Coverage

The insurance provided by the Vendor shall be primary to any coverage available to the Polk County. The insurance policies (other than workers compensation and professional liability) shall include provisions for waiver of subrogation.

Indemnification

Vendor agrees to accept all responsibility for loss or damage to any person or entity, including Polk County, and to indemnify, hold harmless, and release Polk County and its employees, from and against any actions, claims, damages, liabilities, disabilities, or expenses, that may be asserted by any person or entity, including the Vendor, that arise out of, pertain to, or relate to Vendor's performance or obligations under any contract. The Vendor agrees to provide a complete defense for any claim or action brought against Polk County based upon a claim relating to Vendor's performance or obligations under any contract. The Vendor's defense, indemnification and hold harmless obligations under this Section apply whether or not there is concurrent negligence on Polk County's part, but to the extent required by law, excluding liability due to Polk County's conduct. Polk County shall have the right to select its legal counsel at Vendor's expense, subject to Vendor's approval, which shall not be unreasonably withheld. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for the Vendor or its agents under workers' compensation acts, disability benefits acts, or other employee benefit acts.

4.0 Proposal Format and Instructions

In order to facilitate the analysis of responses to this RFP, Offeror's are required to prepare their proposals in accordance with the instructions outlined in this section. Offeror's should be sure they have received the Key System Requirements located in Appendix C.

Polk County may make such investigations it deems necessary to determine the ability of the bidder to perform the work proposed. Conditional proposals will not be accepted.

If revisions become necessary to the RFP, Polk County will provide addenda to all proposers who have received the RFP. All addenda issued by Polk County must be so noted on any proposals that are submitted to Polk County. Offeror's shall communicate with the Polk County designated response contact to ascertain whether any addenda have been issued. Failure to do so could result in a proposal being deemed non-responsive to the RFP.

Proposals should be prepared as simply as possible and provide a straightforward concise description of the Offeror's capabilities to satisfy the requirements of the RFP. Emphasis should be on accuracy, completeness and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled. The proposal should be organized into the following 16 major sections:

Title	Contents
Cover Page	
Letter of Transmittal	
Table of Contents	
Executive Summary	Provide a brief narrative highlighting the proposal's main points.
Proposed Software	The Offeror must present in detail features and capabilities of the proposed software. In addition, the following information should also be addressed: List the operating system software support products required to support the recommended computing environment. The bidder should also explicitly state the name of any third-party products that are part of the proposed solution to Polk County list of requirements. For each third-party product there should be a statement about whether the Offeror's contract would encompass the third-party product and/or whether Polk County would have to contract on its own for the product.
Optional Software	Include a description of any products, features or other add on or value-added components available for use with the proposed software application(s) that have not been specifically requested in this RFP. Consideration of these products features or other value-added components will be given where these may be of value to the Polk County.

<p>Offeror Information Qualifications and Experience</p>	<p>Complete the Vendor Information Tab located within the RFP Requirements Appendix C. In addition, provide a narrative overview of the qualifications and experience of your firm including the following:</p> <ol style="list-style-type: none"> a. Provide an overview description of the Offeror’s qualifications related to the requirements defined in this RFP. b. Provide the number of years the firm has provided the products and services outlined in the RFP. c. Provide the name of the Principal or Project Manager who will have direct and continued responsibility for the project. This person will be the County’s contact on all matters dealing with the project and will handle the day-to-day activities through completion. d. Provide a bio/resume for all staff/employees assigned to the proposed implementation team including a list of the tasks for which they will be responsible. e. Identify services that will be outsourced to a sub-contractor. The Offeror will be responsible for verifying the experience and qualifications for any outsourced work to sub-contractors. f. Availability during the designated period for software demonstrations. These demonstrations may be conducted onsite in Crookston, MN or may be provided remotely at the discretion of Polk County. Offeror must be available for either option.
<p>Key System Requirements</p>	<p>Responses to Key System Requirements must be indicated Appendix C and returned as a critical component of the RFP. Proposers should answer the questions in the format provided and add any explanatory details necessary in a separate column to the right of the item being referenced. The following answer key should be used when responding to the requirements:</p> <p>Column C Coding</p> <ul style="list-style-type: none"> 5 = Fully meets requirement “out-of-the box” 3 = Available in next version (include estimated date of release in Comments) 2 = Modification (please note cost in comments) 1 = Third-party software/Work around/Report Writer 0 = Not Available <p><i>Note: Any requirement that is answered with a symbol other than what is listed above will be treated as a negative/non-response.</i></p>

Pricing	<p>Provide a detailed cost of ownership for all software licenses, support, training and implementation services being proposed.</p> <p>Pricing must be complete and list any available discounts, one-time and recurring costs for five years, including all hardware, software, support and licensing costs.</p> <p>Estimates for implementation services should include the following:</p> <ol style="list-style-type: none"> a. Project management b. Installation and implementation of the software c. System configuration d. Training e. Interfaces or integrations f. Report development g. Travel h. Post Go-Live Support <p>Pricing information supplied with the response must be valid for at least 150 days.</p>
Implementation	<p>Complete information requested in Tab 2 of the Key System Requirements Appendix C and provide an overview of Offeror's implementation methodology including, but not limited to, examples of or recommendations for the following:</p> <ol style="list-style-type: none"> a. Project Plan: including phases, tasks and timeline. b. Implementation methodology using phases or all modules at one time. c. County Resources: role, responsibilities, average estimated time per month. d. Offeror Resources: role, responsibilities, average estimated time per month. e. Process Improvement: approach to process improvement through implementation. The County's preference is to modify processes where necessary to leverage best practices offered by the software. f. Change Management: tools and methodology. g. Data Conversion: tools, methodology, experience with legacy system(s) identified in this document. h. Environments available (production, test, training, etc.) i. Testing: configuration, technical, user acceptance, etc. j. Training: approach, resources available, documentation provided. k. Integration: approach, tools, experience. l. Post Go-Live Implementation Support.

<p>Support</p>	<p>Complete information requested in Tab 2 of the Key System Requirements Appendix C and provide an overview of the support services offered and recommended for the products proposed in this RFP, also including:</p> <ul style="list-style-type: none"> a. System Administration: performance monitoring, tuning, loading of patches and version releases. b. Disaster Planning and Recovery: for on-premises and/or hosted options proposed. c. User Groups and conferences, community forums, knowledge base, etc. d. End User Support: number of staff offering user support, hours of service, average and guaranteed response time, ticketing system used, escalation process, user forums, etc. e. Software Upgrades: timing, support provided, documentation. f. Documentation: description and examples of user, administrator, and technical system reference documents and help materials, e.g. procedures, definitions, configuration, API's, etc.
<p>Information Technology</p>	<p>Provide the following information regarding the technology of the proposed solution:</p> <ul style="list-style-type: none"> a. On-Premises versus SaaS or Hosted options and definition of each. b. Hardware specifications for the proposed solution. c. Mobile hardware and operating system specifications. d. Support for Service-Oriented Architecture, Specific Web Services Standards supported (e.g. WSDL, REST, JSON), Server Virtualization, etc. e. Support for remote access technologies and encryption (VPN, synchronization, etc.). f. Escrow Agreements, etc. Address how the County's ERP data would be delivered or provided to the County if the relationship between the County and the Offeror is terminated. g. Development languages, structures or frameworks used e.g. .NET architecture, SQL, etc.
<p>Training - Post Go-Live</p>	<p>Complete information requested in Tab 2 of the Key System Requirements addendum. Also provide information on training resources provided for technical and user training post go-live; your approach to delivery, training materials provided, available online tutorials, etc.</p>
<p>References</p>	<p>Using the forms provided in Appendix A, provide five references that are similar in size and project scope to the County. Three references shall be current customers, and two references shall be past customers.</p> <p>Polk County prefers vendors who have developed expertise and have experience and knowledge with governmental entities and procedures and who specialize in fund accounting systems. Therefore, one of our core requirements is the Vendor's proposed software must be currently operating in a production environment for a governmental entity. Proposers should have governmental entity clients and be willing to provide a list of at least five (5) governmental entity installations during the past three (3) years that are utilizing the proposed system. These references must be for governmental entities located in the United States. Submit references for fully completed installations to the extent possible. If a listed reference is not on the current release of your software or they have multiple releases of your software in operation, this must be clearly specified.</p>

Contract Performance	Indicate if Offeror has had a contract terminated for convenience, non-performance, or any other reason, or has entered into legal action with a customer in the past five years. Describe the situation.
Additional Information	Proposers may use this section to include additional information about their products and services not covered in other sections of the proposal. Examples could include: Published case studies, Newsletters, Conference information, Documentation

5.0 Specifications

Requirements defined in this section contain the overall general functions of Polk County desired integrated software applications. These requirements underlie the detailed Key System Requirements contained in Appendix C. Together, these two sections define a system that will provide a high level of flexibility in meeting Polk County current and future computing requirements. Please address each as it relates to your company and applications.

- 5.1 PROCESSING ENVIRONMENT:** A preferred or specific hardware platform will not be specified in an effort to obtain the widest range of software solutions to meet Polk County information processing needs.
- 5.2 DATABASE:** The database design should allow for a wide range of drill-down capabilities. Table and column names should be intuitively labeled and linked columns should be consistently named. *Systems with flat, ISAM, COBOL or MS-Access based files will not be considered.* If your system cannot meet these requirements please note the deficiencies.
- 5.3 REAL-TIME MODE:** Applications are expected to run in real-time mode. Systems that use temporary holding areas will not be considered. Historical transactions will be used to drive reporting and interaction among systems. The system should support an unlimited number of years of history with no performance degradation as history grows. If your system cannot meet these requirements please note the deficiencies.
- 5.4 LOGIN:** Identify whether system uses Active Directory for a singular sign on and provide detailed audit trails required by Polk County external auditors. If your system cannot meet these requirements please note the deficiencies.
- 5.5 TABLES:** Dynamic tables must be used where applicable to preclude repetitive entry for validity checking and to eliminate program code changes when rules are changed or added.
- 5.6 WORK FLOW:** The system should provide work flow capabilities in **all** applications, with user-defined business rules, processes and securities. It should allow for an unlimited number of steps/approvals/notifications on any single work flow. If your system cannot meet these requirements please note the deficiencies.

- 5.7 SECURITY:** Security must be detailed and provide several levels, including application, processes, menus and **every** field. In addition to individual user securities, the system should also allow for easy grouping of users to minimize security set-up. If your system cannot meet these requirements please note the deficiencies.
- 5.8 SUPPORT:** The selected vendor(s) must be able to provide timely and adequate telephone and email support during Polk County normal business hours of 8:00 a.m. to 4:30 pm CT. Vendor(s) support must deal with issues related to adjunct third-party software. Vendors will also deal with database issues that preclude their products' functionality. Polk County intends to rely solely on the application vendor(s) as its support source. Please note your average response time and your methodology for prioritizing calls. If your system cannot meet these requirements please note the deficiencies.
- 5.9 HARDWARE:** Proposals are for software only. Please list all hardware requirements. If an on premise solution is chosen, Polk County will implement and maintain its own hardware and network.

6.0 Evaluation and Selection

- 6.1 EVALUATION METHOD:** The evaluation process is not meant to imply that one proposer is superior to any other, but rather that the selected proposer can provide and has proposed the best software and implementation approach for the Polk County's current and future needs based on the information available and Polk County's best efforts of determination.

Polk County will evaluate all proposals deemed responsive to this RFP. The initial evaluation will consider only the qualifications and demonstrated experience of each respondent. Following the evaluation committee's analysis of the written proposals and discussions the responses will be ranked to establish the highest score. Proposers may be asked to provide onsite demonstrations. Discussions and negotiations may take place with the short list of proposers to ensure clarification and to obtain a best and final offer. The award will be based upon the proposal that is determined to be the most advantageous to Polk County.

6.2 SELECTION CRITERIA: The intention of Polk County is to procure functionally complete, cost effective and integrated software applications. The criteria that will be used to evaluate proposals may include, but are not limited to the following:

- Quality clarity and responsiveness of proposal in conformance with instructions condition and format contained herein
- Technical requirements
- Timeliness and professionalism of on-going support
- Demonstrated performance of proposed system elsewhere in government sector.
- Implementation strategy and timelines
- Quality of training
- On-going training
- Customer support
- Cost and quality of software and implementation services
- Cost of on-going maintenance
- Reference checks
- Ability to provide a system that contains the integration capability with key systems integral to Polk County's operations.

6.3 ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract as a result of this solicitation, the County will publicly post such notice on the Polk County, MN website www.co.polk.mn.us for a minimum of 10 days.

APPENDIX A CUSTOMER REFERENCE FORM

*Using the template below provide references for each software solution proposed.
Include three current customers and two prior customers.*

CUSTOMER REFERENCES - EXISTING CUSTOMERS

Item	Offerer Response
Client Reference No. 1 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Products, Modules, Services Provided by Offeror	
First Date of Business Relationship with Offeror	
Go Live Date	
Rationale for including the specific reference	
Client Reference No. 2 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Products, Modules, Services Provided by Offeror	
First Date of Business Relationship with Offeror	
Go Live Date	
Rationale for including the specific reference	
Client Reference No. 3 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Products, Modules, Services Provided by Offeror	
First Date of Business Relationship with Offeror	
Go Live Date	
Rationale for including the specific reference	

APPENDIX A CUSTOMER REFERENCE FORM

Continued...

CUSTOMER REFERENCES - PRIOR CUSTOMERS

Item	Offerer Response
Client Reference No. 1 - Prior	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Products, Modules, Services Provided by Offeror	
First Date of Business Relationship with Offeror	
Go Live Date	
Reason Why No Longer Using Software	
Client Reference No. 2 - Prior	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Products / Services Provided by Offeror	
First Date of Business Relationship with Offeror	
Go Live Date	
Reason Why No Longer Using Software	

APPENDIX C
KEY SYSTEM REQUIREMENTS

Complete information requested and responses to Key System Requirements directly in that form and return form as part of your response.