



Town of Los Gatos
Request for Proposal (RFP)
for
Enterprise Resource Planning (ERP) System
and Implementation Services

All Proposals Must Be Submitted To:

Town of Los Gatos
110 E Main Street
Los Gatos, CA 95030

Issue Date:
October 5, 2021

Deadline for Proposal Submissions:
November 2, 2021

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INSURANCE ACKNOWLEDGMENT CERTIFICATE (FOR SUBMITTAL)

1 RFP Overview

1.1 Purpose of RFP

The Town of Los Gatos (Town) has issued this Request for Proposal (RFP) to solicit responses from qualified firms (Proposers) offering proven, integrated solutions to replace the Town's current Sungard – Pentamation - FinancePlus Enterprise Resource Planning (ERP) system, specifically in the areas of Finance, Human Resources, Payroll, and Miscellaneous Billing.

The Town seeks a qualified Proposer who can demonstrate organizational, functional, and technical capabilities, as well as the experience, expertise, and qualifications necessary to provide and support a fully integrated and proven ERP solution to include both implementation and ongoing maintenance and support.

Note that the Town is open to either an on-premises or SaaS based solutions.

1.2 Project Objectives

With this RFP, the Town intends to replace its existing ERP system with a proven, commercial-off-the-shelf (COTS) ERP system. The Town's goal is to take advantage of a modern ERP system that is designed around municipal best practices allowing the Town to streamline and improve processes that result in timely, accurate, and easy-to-access information. More specifically, the new ERP system should meet all of the following objectives:

- Consolidate information, link processes and functions, and eliminate separate departmental spreadsheets/Excel databases in favor of a single system that integrates the Town'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 the need for redundant data entry;
- Eliminate the need for manual input when preparing the annual budget and financial statements;
- Improve and/or provide necessary reports and reporting capabilities, and access to data through inquiry or drilldown capabilities; and
- Provide interface capabilities with third-party systems.

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

1.3 Procurement Schedule

Table 1 identifies the procurement schedule.

Table 1. Procurement Schedule

Procurement Event	Date/Time
Town Issues RFP	October 5, 2021
Deadline for Proposer Questions	October 12, 2021 5:00 PM PT
Town Provides Responses to Questions	October 19, 2021
Deadline for Proposal Submissions	November 2, 2021 5:00 PM PT
Town Completes Evaluations/Interviews/Presentations	Week of November 29, 2021
Intent to Award	Week of December 20, 2021

The Town reserves the right, at its sole discretion, to adjust the procurement schedule as it deems necessary.

1.4 RFP Coordinator

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

Gitta Ungvari
 Finance and Budget Manager
gungvari@losgatosca.gov

The RFP Coordinator will be the sole point of contact for this RFP.

Proposer contact with anyone else in the Town is expressly forbidden and may result in disqualification of the Proposer's bid. Further, any oral communications will be considered unofficial and non-binding on the Town. Proposers should rely only on written statements issued by the RFP Coordinator.

1.5 RFP Amendment and Cancellation

The Town reserves the unilateral right to amend this RFP in writing at any time. The Town 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 who submit a proposal. In addition, any amendments will also be posted on the Town's website at: <https://www.losgatosca.gov/2258/RFPFAQ>.

1.6 RFP Questions

Questions concerning this 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 Town's responses shall be posted on the Town's website identified in Section 1.5 and sent directly to all Proposers who submit a proposal.

1.7 Proposal Submittal

Proposals are to be received by the Town no later than the date and time indicated in Section 1.3. Proposers assume the risk of the method of delivery selected. The Town assumes no responsibility for delays caused by any delivery service. Postmarks will not be accepted as proof of receipt. Emailed proposals will not be accepted. 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) bound paper copy clearly marked "Master Copy."
- One (1) electronic copy (a single .pdf file containing all submitted material). In the event of a discrepancy between the electronic version and hard copy, the response in the hard copy (Master) will prevail.

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

Town of Los Gatos
Attention: Gitta Ungvari, Finance and Budget Manager
110 E Main Street
Los Gatos, CA 95030

The package should be clearly labeled with the following:

Confidential
Proposal for Enterprise Resource Planning (ERP) System and Implementation Services
Proposal Due Date and Time
Proposer Name
Proposer Address
Proposer Phone Number

2 Town Overview

The Town of Los Gatos is a small community nestled at the base of the Santa Cruz Mountains, approximately 60 miles south of San Francisco. The Town of Los Gatos is guided by the principles of Small Town Service, Community Stewardship, and Future Focus. The Town government is fiscally healthy, and focuses on teamwork, collaboration, and civic engagement. Los Gatos is a General Law Town with a five-member Council and an annually rotating Mayor position. The Town Council sets the policies for which the Town employees implement under the leadership of the Town Manager. The Town operates one Civic Center, one Police Operations building, one Corporation Yard, and one Library and employs approximately 210 personnel.

The Town is comprised of the following departments/divisions:

- ◆ Town Manager
- ◆ Town Attorney
- ◆ Community Development Department
- ◆ Police
- ◆ Parks and Public Works
- ◆ Library
- ◆ Human Resources
- ◆ Finance
- ◆ Clerk Department
- ◆ Information Technology

3 Environment

To help Proposers prepare their RFP responses, this section documents the existing ERP, the potential interfaces to the new ERP, the Town's current technology standards, and key metrics pertaining to financial and human resources operations.

3.1 Existing ERP System

The Town currently uses Sungard – Pentamation, FinancePlus to support Financial and HR/Payroll operations for its approximately 210 employees with approximately 61 active users. This system was originally purchased and implemented by the Town in 2008. Below is a list of the functional components of the current software.

- General Ledger
- Budget
- Accounts Receivable
- Purchasing & Inventory
- Fixed Assets
- Payroll
- Human Resources/Employee Information
- Cash Receipts
- Custom Data Reporting
- Optio Signatures
- Business Licensing
- Document Imaging
- Miscellaneous Billing (Customer Information Management)

3.2 Integration with Other Systems

Table 2 identifies the proposed interfaces with the new ERP. The Town's objective is to remove or minimize the need for manual intervention.

Table 2. Proposed Interface Detail

Application	Purpose	Freq.	Notes
S) – Accela	Receive cash receipt information from Accela Cloud to the new ERP.	Daily	The Town is in the process of migrating the on-premise Accela environment to Accela’s cloud hosted solution.
RecPro Park Reservation Software (Park Reservation System)	Receive cash receipt information from RecPro Park Reservation Software to the new ERP.	Daily	Payments currently processed through forte.net. The Town might replace RecPro if the new ERP can provide a suitable integrated solution.
Bank of the West	Send payroll data, warrant data (Positive Pay), accounts payable data, and bank reconciliation data from new ERP to Bank of the West. Receive bank reconciliation data from Bank of the West to the new ERP.	Payroll – Bi Weekly Warrant , AP and Bank Rec - Daily	
Wells Fargo Bank	Receive cash receipt information and bank reconciliation data from Wells Fargo Bank to the new ERP.	Daily	The Town currently has 7 zero balance merchant accounts to accommodate credit card and online payments
Computerized Cartegraph	Send labor, material, asset information and other resources tracked by PPW into new ERP for cost management and budgeting. Cartegraphs	Daily	
NeoGov	Send applicant data from NeoGov to the new ERP.	As Needed	
CalPERS	Send retirement health enrolment and payroll compensation data from the new ERP to CalPERS.	Bi-Weekly	
MissionSquare Retirement	Send enrollment, termination, and deferred compensation data from the new ERP to MissionSquare Retirement.	As Needed/Bi-weekly	
ReviewSnap	Send employee data from the new ERP to ReviewSnap	As Needed	
Internal Revenue Service (IRS)	Send 1099 and 1095 (ACA) data from the new ERP to the IRS.	Annually	

Application	Purpose	Freq.	Notes
CA Employment Development Department (EDD)	Send the following data from the new ERP to EDD: -Tax Return Data -Wage Report Data -Payroll Tax Deposit Data -New Employee Information	Quarterly/ Annually As Needed	
Social Security Administration (SSA)	Send W2 data from new ERP to SSA.	Yearly	
Third-Party Insurance Providers	Send updated benefit selection data from new ERP to insurance providers.	As Needed	
Laserfiche	Send documents from new ERP to Laserfiche.	As Needed	

3.3 Technology Standards

Table 3 identifies the Town’s current technology standards. The proposed system should 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.

Table 3. Technology Standards

Technology	Current Standard
Database(s)	Microsoft SQL Server 2017
Server OS	Microsoft Windows Server 2012 R2, 2016, 2019
Desktop OS	Win 10 Professional
Server Hardware	Cisco UCS
Desktop Hardware	Dell Optiplex
Laptop Hardware	Dell Latitude/Microsoft Surface Pro
Mobile Hardware	Apple iPad
Browsers	IE, Edge, Chrome, Firefox
Email Server/Client	Microsoft 365
Virtual Environment	Microsoft Hyper-V
Storage Area Network	HPE Nimble (SAN)
Active Directory	Microsoft Windows AD (2008)
VPN	Cisco AnyConnect
Scanners	Konica Minolta (various models)
Printers	Konica Minolta (various models)
Internet <ul style="list-style-type: none"> Bandwidth 	250 MB Fiber

3.4 Key Metrics

Table 4 provides information regarding key metrics pertaining to financial and human resource operations.

Table 4. Key Metrics

Functional Area	Volume/Statistics	Frequency (if applicable)
Human Resources		
Recruitments	15-20	Annually
New Hires (FTE and Temporary/Seasonal)	30	Annually
MOUs	3	N/A
FTEs	150	N/A
Temporary/Seasonal	30-6	Fluctuates
Position Classifications	190	N/A
Employee Action Forms (e.g., new hire, paychanges, employee separation, misc. pay assignments and status, etc.)	200	Annually
Finance		
Purchase Orders	313	Annually
Invoices	6350	Annually
Journal Entries	~185	Monthly
Funds	47	N/A
Bank Accounts	6	N/A
Payroll Checks Issued	~175	Biweekly
Capital Projects	60	Ongoing
Vendors (Active)	5,508	N/A
Business Licenses	4,100	Annually
Miscellaneous Billing		
Miscellaneous Billing Accounts	1300	N/A
Individual Bills	40	Monthly
Monthly Recurring Bills	20	Monthly
Annual Recurring Bills	470	Annually
General		
Total FinancePLUS Users (Townwide)	210 (this includes 15 power users)	N/A

4 ERP System Requirements

4.1 Required Modules

The Town is seeking a highly integrated system that can serve as many of the Town's various department needs as possible. Mandatory solution modules must include the following functionality:

- Finance
 - General Ledger/Accounting
 - Budgeting
 - Vendor Management
 - Procurement/Purchasing
 - Contract Management
 - Accounts Payable
 - Payroll Processing
 - Fixed Assets/Inventory
 - Accounts Receivable/Miscellaneous Billing
 - Business License Management
 - Cash Receipts (Cashiering)/Online Payment
 - Grant Management
 - Project Management
 - Capital Improvement Project Management
 - Bank Reconciliation
 - Report Writing/Analytics
 - Budgeting
 - Personnel Budgeting
 - Forecasting
 - Annual Financial Report Preparation
 - Support and Training
- Human Resources
 - Position Control
 - Employee Master File
 - Benefit Administration
 - Leave Administration
 - Training and Certifications
 - Personnel Actions
 - Employee Self-Service

- Pay Administration
- Time and Attendance
- Support and Training
- Separation/Offboarding
- Multiple Salary Table Creation/Update/Modeling
- Optional
 - Onboarding
 - Performance Reviews

At a minimum, Proposers must propose a solution that includes the modules identified above.

4.2 Key Functionality

The Town is interested in adopting modern, automated tools that support financial, human resource, and miscellaneous billing 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, inquiry/reporting, etc. The specific functionality required can be found in Appendix A - Requirements.

4.3 Implementation Timeline

The Town 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 Proposer's recommended implementation timeline should be clearly articulated in their proposal response as described in Proposal Format and Content - Section 6 – Project Implementation.

4.4 Requirements and Response Codes

Proposers must respond to the ERP Requirements included in Appendix A – Requirements. Proposers are to respond to each of the requirements for the application(s) being proposed with one of the following response codes:

- Y – Meets Requirement
- N – Does Not Meet Requirement
- F – Planned for future release
- W/C – Workaround Proposed or Customization Needed to Meet Requirement
- T – Third-Party Solution to Meet Requirement

NOTE: Response Codes “Y” and “N” do not require written responses unless Proposers wish to present additional benefits or opportunities related to their solution and the requirement. However, response codes “F”, “W/C” and “T” do require written responses. For these response codes, Proposers must describe how the requirement will be met and when.

5 Proposal Format and Content Requirements

5.1 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.

Glossy sales and marketing brochures are not to be included.

Proposals must be organized consistent with the outline provided. Proposers should follow all prescribed 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 Town's information requirements.

5.2 Proposal Format and Content

Proposals should 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 – Project Implementation
- Section 7 – Ongoing Maintenance and Support Services
- Section 8 – Pricing
- Section 9 – Software Licensing and Maintenance Agreements

Proposals should be prepared on standard 8½ x 11 paper and be printed on both sides.

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

Cover Letter

The Cover Letter, which is to be no longer than three (3) pages (this page count excludes any provided exceptions), must include the following:

- Proposer's legal name and corporate structure, including state incorporated in.
- Proposer's primary contact to include name, title, address, phone, and email.
- The type of solution being proposed (on-premises or SaaS).
- 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 last ten (10) years.

- Statement indicating that the proposal remains valid for at least 120 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 Town).
- Statement of acknowledgement that the Town's relevant legal requirements in Appendix - B 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. If no exceptions are noted, the Town will assume that the Proposer can perform all tasks and services without reservation or qualification to the contract and are willing to comply with all requirements included.
- Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it.

Table of Contents

All sections should be identified, and pages are to be consecutively numbered.

Section 1 – Executive Summary

In this section, Proposers must provide a brief and concise synopsis of Proposer's solution and a description of the Proposer's credentials to deliver the services sought under the RFP. The Executive Summary must be no longer than three (3) pages.

Section 2 – Company Background

In this section, Proposers must provide a description of company's background/history to include:

- Timeline, including company and product evolution, mergers, acquisitions, etc.
- Location of headquarters, technical support, field offices, and office location that would service the Town; and the total number of company employees
- Annual company revenues and profit for the last three company fiscal years

The Company Background section must be no longer than three (3) pages.

Section 3 – Company Qualifications

In this section, Proposers must provide company qualifications and experience in implementing solutions similar in size and scope to what the Town is seeking:

- Describe the Proposer's familiarity with public sector ERP systems and associated business processes, and specific experience with the requirements of municipalities.
- Identify Proposers 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 agencies.

The Company Qualifications section must be no longer than three (3) pages.

Section 4 - References

In this section, Proposers must provide five (5) references with at least three (3) of the references for systems that have been implemented in the last five (5) years. References should be from municipalities of similar size and complexity to the Town and be specific to the software version/release being proposed

For each reference, provide the following:

- Reference name and contact information (name, title, address, phone, and email).
- Brief project description, including identifying the software version, type of solution (SaaS or on-premises) modules, and interfaces implemented.
- Implementation timeline and Go-Live date.

The References section must be no longer than five (5) pages.

Section 5 - Proposed Solution

In this section, Proposers must identify the proposed solution. The Town is open to receiving proposals for either on-premises or SaaS based solutions. If the Proposer has different solutions types for the same software, separate pricing must be included for each solution type (see Appendix C – Price Sheets for more information).

Proposals must describe the proposed solution in relation to the following:

- 5.1 – Solution Overview
 - Name and origin of solution
 - Solution type (on premises or SaaS)
 - Database platform description
 - Release history and current release being proposed
 - Proposed modules, including identification of whether each module is included or “optional”
 - Identification of which modules are included in the total cost versus which are proposed at an additional cost
 - Processes for updating the system with new releases (SaaS solutions)
 - Proposed tools for Town staff to update the system with patches and new releases, as well as descriptions of the processes used to update and/or patch the system (on-premises solutions)
 - Hardware, software, and database specifications required for the proposed solution – include all server and/or client specifications (on premises solutions)
 - Mobile capabilities of the proposed modules, including any restrictions, such as mobile platform (iOS and Android)
- 5.2 – Application Integration/Interface
 - Describe how the Proposer would develop, implement, and manage the interfaces pertaining to the Town applications identified in RFP Section 3 and Appendix A – Section 5.4.
 - Describe APIs and web-services available to pull and push data:
 - Are the APIs secured and encrypted?
 - Describe the programming language(s) that interface with the APIs.
 - Describe Proposer’s approach to implementing the required interfaces, including:
 - Whether any interface is excluded and explanation of why it is excluded
 - Description of each interface/integration type (manual file transfer, or real-time, live interface)
- 5.3 – Data Storage and Backup (SaaS solutions only)
 - Describe approach to data storage

- Describe data backup process
- Describe the network bandwidth required between the Town and hosting facilities
- Describe what options are available for dedicated bandwidth (if available)
- Describe scalability options for computing power (CPU, RAM, and storage)
- 5.4 – Data Access and Security (SaaS solutions only)
 - Describe how data access is managed
 - Is SSO and/or MFA supported?
 - Describe the environment (single or multi-tenant)
 - If a multi-tenant environment, how is the data segregated?
 - If a multi-tenant environment, how is security managed?
- 5.5 – Business Continuity and Disaster Recovery (SaaS solution only)
 - Describe approach to business continuity and disaster recovery
- 5.6 – Service Level Agreements (SLA) (SaaS solution only)
 - Describe supported SLA's (e.g., reliability, availability, performance, issues, requests, system response time, etc.)
- 5.7 – Transition (SaaS solution only)
 - Describe the proposed exit strategy at contract completion, including how data will be made available to the Town
- 5.8 – Provide a response to each item in Appendix A – Requirements
 - The Town will provide a copy of RFP Appendix A in MS Word. Proposers must use that file to address each requirement in Appendix A and present those pages following this heading.

Section 6 – Project Implementation

Describe project implementation in relation to the following:

- 6.1 – Project Organization
 - Provide a project organization chart highlighting Proposer key staff who will be assigned to the project
 - Provide bios for the Proposer key staff
 - Providing a staffing matrix that identifies the specific roles/responsibilities to be filled by Proposer staff versus those to be filled by Town staff. As part of this matrix, identify estimated level of effort for each staff person and when that person would be required (what part of the implementation)
- 6.2 – Project Management
 - Describe project management methodology/approach
 - Describe high-level roll-out approach, including order and timing of specific modules
 - Provide a Project Schedule that identifies tasks, activities, dates, durations, resources, deliverables, and milestones
 - Provide a Project Plan that describes your approach to Schedule Management, Cost Management, Scope Management, Communications Management, Issues Management, Risk Management, Change Management, etc.
- 6.3 – Implementation Specifics

- Data conversion – the Town does plan to convert historical data. Describe any issues/concerns vendors might have regarding this approach.
- Describe training methodology/approach and how you ensure users are prepared to use the proposed solution. Include description of how you address different learning styles (classroom, online, hands-on, etc.), including a description of training materials to be used and timing. Identify alternatives to the train-the-trainer approach, and identify any related, additional costs in RFP Appendix C – Price Sheets.
- Describe testing methodology/approach, including the criteria, methods, and timing to ensure successful completion of user acceptance testing prior to go live. Identify the specific roles/responsibilities pertaining to Town staff vs. Proposer staff. Identify alternatives to the Town developing the UAT plan and related test scripts/use cases, and identify any related, additional costs in RFP Appendix C – Price Sheets.

The Project Implementation section must be no longer than 15 pages (excluding the Project Schedule).

Section 7 – Ongoing Maintenance and Support Services

Describe ongoing maintenance and support services in relation to the following:

- 7.1 – Help Desk
 - Help desk location(s), staffing, ticketing system utilized, processes, and procedures
 - Ticket prioritization, response time commitments, and escalation procedures
 - Support hours (in Pacific Time)
 - Number of help tickets per year and average resolution time by priority level
- 7.2 – System Monitoring
 - Describe how the system will be monitored and how and when the Town will be informed of system performance issues, etc.
- 7.3 – Post-Implementation Evaluation Report (PIER)
 - Proposers must develop one PIER six months after the Finance implementation, one six months after the HR/payroll implementation, and one six months after the Miscellaneous Billing implementation. Describe how Proposer would support these PIER assessments, including the expected PIER content, how gaps in system utilization would be identified, and how those gaps would be addressed through additional training [minimum one full week (40 hours) of Proposer led, onsite training after each of the three implementations].
- 7.4 – Application Upgrades
 - For on-premises solutions:
 - Identify the frequency of upgrades over the past two (2) years
 - For SaaS solutions:
 - Identify the frequency of upgrades over the past two (2) years
 - Identify the typical upgrade schedule
 - Describe how upgrades would be performed
 - Describe any downtime related to upgrades
 - Describe how the Town would be notified of such upgrades and how much lead time would be provided
 - Describe the Town’s ability to delay, test, accept, and/or deny applying upgrades
- 7.5 – Change Management (post implementation)

- Describe the post-implementation Change Management process
- 7.6 – User Groups/Conferences
 - Identify if there are any solution user groups and/or user conferences including frequency and location of events, topics, etc.

The Ongoing Maintenance and Support section should be no longer than ten (10) pages.

Section 8 – Pricing

The Town seeks a clear and comprehensive understanding of all costs associated with the software, implementation services, and ongoing maintenance of the proposed system.

To address pricing, the Town will provide Proposers with a copy of RFP Appendix C – Price Sheets in MS Excel format. All pricing information must be included in Appendix C as requested.

All costs pertaining to the implementation and maintenance are to be itemized. The Town will evaluate proposals 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 or SaaS service fees.

The Proposer’s implementation pricing must identify all costs required to include:

- Software Licensing Costs
- Implementation Services
 - Project management
 - Software configuration
 - Data conversion and migration
 - Interface development
 - Training and documentation
 - Testing
 - Go-Live
- Travel

The Proposer’s ongoing maintenance and support/hosting pricing should clearly identify the annual costs for five (5) years to include:

- Maintenance and Support
- Post Implementation Evaluation Report (PIER) and associated training (one after the Financial implementation, one after the HR/Payroll implementation, and one after the Utility Billing implementation)

Note that the Town expects to sign two distinct contracts with the selected vendor – one for the implementation and one for ongoing operations and support/hosting both as described above.

The Town is not responsible for compensating Proposers for the time and expenses associated with the preparation of the proposal.

Section 9 – Software Licensing and Maintenance Agreements

To address this section, Proposers must provide any software licensing, SaaS, maintenance, and/or 3rd party agreements that would be required to implement and use the Proposer’s solution.

6 Proposal Evaluation

An Evaluation Committee will review all proposals. Submitted proposals will be evaluated on the following criteria:

Criteria	Explanation	Weight
Merit of Proposal/Presentation	Thoroughness and responsiveness of submitted proposal; Quality of communication skills;	15 points
Knowledge and Expertise of Personnel/Firm	Capability and Qualifications of personnel/Firm; Assignment of appropriate Staff; Time allocated by key personnel; Perceive risk or lack thereof; Experience of Proposer's project team; Proven technical ability to design, install, and support the proposed system; Commitment to continually evolve the system to remain current with legal requirements, such as reporting, as well as operational best practices;	30 points
Pricing	Cost of initial purchase; Cost of implementation; Cost of on-going service and maintenance;	15 points
Understanding of Project and Implementation	Knowledge of project and requirements; comprehensiveness of implementation approach; Ability to meet project schedules/timelines; Flexibility to accommodate the needs of the Town;	30 points
Record of Past Performance	References representative of the Town's scope of work; Company financial stability; Ability to work effectively with Town implementation team; Demonstrated ability to meet timelines.	10 points

The Town reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for 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 Town and, if held, shall be after the initial evaluation of proposals is complete. If clarifications are made because of such discussions, the Proposer shall put such clarifications in writing.

7 Appendix A – Requirements

See separate Word document.

8 Appendix B – Sample Town Agreement

See separate Word document.

9 Appendix C – Price Sheets

See separate Excel document.

10 Attachments

The following attachments are incorporated into the Request for Proposal:

ATTACHMENT 1 – CONFLICT OF INTEREST STATEMENT (FOR SUBMITTAL)

ATTACHMENT 2 – NON-COLLUSION DECLARATION (FOR SUBMITTAL)

ATTACHMENT 3 – STATEMENT REGARDING INSURANCE COVERAGE AND WORKER'S
COMPENSATION INSURANCE ACKNOWLEDGMENT CERTIFICATE (FOR SUBMITTAL)

ATTACHMENT 1 - CONFLICT OF INTEREST STATEMENT

THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

The undersigned declares:

I/We _____ (Insert Name) have the following financial, business, or other relationship with Town of Los Gatos that may have an impact upon the outcome of the contract. If none, please specify that no other relationships may have an impact on this contract or Project.

I/We _____ (Insert Name) have the following current clients who may have a financial interest in the outcome of this contract. If none, please specify that no other clients may have a financial interest with an impact on this contract or Project.

Pursuant to Government Code section 1090 and any other laws, rules and regulations that may apply, the Proposer covenants that neither it, its subcontractors nor employees presently have an interest, and shall not acquire any interest, direct or indirect, financial or otherwise that would conflict in any manner or degree with contract awarded from this RFP. Proposer certifies that to the best of its knowledge, no one who has or will have any financial interest in the contract awarded from this RFP is an officer or employee of the Town. Through its submittal of a proposal, Proposer acknowledges that it is familiar with Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California and will immediately notify the Town if it becomes aware of any facts concerning the contract to be awarded that constitute a violation of said provisions.

Furthermore, if there is reason to believe that collusion exists among the Proposers, the Town may refuse to consider proposals from participants in such collusion. No person, firm, or corporation under the same or different name, shall make, file, or be interested in more than one proposal for the same work unless alternate proposals are called for. A person, firm, or corporation who has submitted a sub-proposal to a Proposer, or who has quoted prices on materials to a Proposer, is not thereby disqualified from submitting a sub-proposal or quoting prices to other Proposers. Reasonable ground for believing that any Proposer is interested in more than one proposal for the same work will cause the rejection of all proposals for the work in which a Proposer is interested. If there is reason to believe that collusion exists among the Proposers, the Town may refuse to consider proposals from participants in such collusion. Proposers shall submit as part of

their proposals documents the completed Non-Collusion Declaration provided herein.

I, on behalf of the Proposer, declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on _____ [date], at _____ [city], _____ [state].

Proposer Name (Person, Firm, Corp.)

Title of Authorized Representative

Address

Name of Authorized Representative

City, State, Zip

Date

Signed

**ATTACHMENT 2 – NON-COLLUSION DECLARATION
THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL**

The undersigned declares:

I am the _____ [Insert Title] of _____, [Insert name of company, corporation, LLC, partnership or joint venture] the party making the foregoing proposal.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The Respondent has not directly or indirectly induced or solicited any other respondent to put in a false or sham proposal. The Respondent has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham proposal, or to refrain from responding. All statements contained in the proposal are true.

Any person executing this declaration on behalf of a respondent that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the respondent.

**ATTACHMENT 3 - STATEMENT REGARDING INSURANCE COVERAGE AND WORKER'S COMPENSATION
INSURANCE ACKNOWLEDGMENT CERTIFICATE**

THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

PROPOSER HEREBY CERTIFIES that the Proposer has reviewed and understands the insurance coverage requirements specified in the RFP. Should the Proposer be awarded a contract for Services, Proposer further certifies that the Proposer can meet the specified requirements for insurance, including insurance coverage of any subcontractors, and agrees to name the Town as additional insured for the Services specified.

By certifying this form, the Proposer also understands the Worker's Compensation insurance requirement per the California Labor Code, Sections 1860 and 1861:

I am aware of the provisions of Section 3700 of the Labor Code, which require every employer to be insured against liability for worker's compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Name of Proposer (Person, Firm, or Corporation)

Signature of Proposer's Authorized Representative

Name & Title of Authorized Representative

Date of Signing