REQUEST FOR PROPOSALS

COMPUTERIZED MAINTENANCE, ASSET MANAGEMENT, AND WORK ORDER MANAGEMENT SOFTWARE

BRUNSWICK COUNTY PUBLIC UTILTIES
BRUNSWICK COUNTY, NC

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I. PROPOSAL INSTRUCTIONS

1. GENERAL

1.1 Brunswick County Public Utilities (BCPU) is soliciting Proposals from qualified software consultants and vendors (Offerors) to provide a Commercial Off-The-Shelf (COTS) product for Asset and Work Order Management (AWOM) purposes.

1.2 The computer maintenance, asset management, and work order management software (hereafter referred to as the Solution), should provide a complete and integrated system for Brunswick County Public Utilities (hereafter referred to as BCPU).

1.3 BCPU reserves the right to retain all Proposals submitted and to use any ideas in a Proposal regardless of whether that Proposal is selected. Submission of a Proposal indicates acceptance by the Offeror of the conditions contained in this RFP, unless clearly and specifically noted in the Proposal and confirmed in the Contract between BCPU and the successful Offeror.

2. SUBMITTAL PROCEDURES

2.1 Proposals will be received by the Director until September 12, 2017, 4:00 p.m. Eastern Time. There will be no public opening.

2.2 A pre-proposal conference shall be held on August 10, 2017, 10:00 a.m. Eastern Time, in the Public Utilities Operations Center training room, 250 Grey Water Road NC, Supply, NC. Attendance is not mandatory; however, all Offerors are encouraged to have a representative physically present. While every effort will be made to answer questions concerning this RFP raised by potential Offerors at the pre-proposal conference, such answers shall be considered unofficial until affirmed in writing. **No recording of any kind by the public will be allowed at pre-proposal conferences.**

2.3 Responsiveness of the proposals will be determined based on compliance with all applicable laws, the County's purchasing guidelines, and required submittal documents.

2.4 Five (5) copies and one (1) original of the proposal (for a total of 6), as well as an electronic copy, shall be enclosed in a sealed envelope addressed and marked as follows:

Hand Delivery or Alternate Shipping Service	Post Office Delivery
Director of Public Utilities	Director of Public Utilities
Utilities Operations Center	Asset & Work Order Management
Asset & Work Order Management	P. O. Box 249
250 Grey Water Road NE	Bolivia, NC 28422
Supply, NC 28462	

2.5 Proposal submittals, modifications, or corrections received after the scheduled closing time will not be considered and will be returned unopened. Brunswick County will not be held responsible for the failure of any mail or delivery service to deliver a proposal response prior to the stated proposal due date and time. It is solely the Respondent Offeror's responsibility to: (1) Ascertain that they have all required and necessary information, documents, and addenda prior to submitting a response; (2) Ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be accepted. **Fax or email responses will not be accepted.**

2.6 No submitted proposals may be withdrawn for a minimum of ninety (90) days after proposal opening.

2.7 No oral interpretation will be made by any Offeror as to the meaning of the proposal specifications or any part thereof. Each written request for clarification or interpretation shall be made in writing to the County.

NOTE: It is the intent of BCPU to issue one (1) addendum, if necessary, to answer any and all Requests for Information (RFI). All RFIs shall be submitted to the Director by fax (910/253-4305) or by email (tamara.galey@brunswickcountync.gov) and must be received by 4:00 p.m., Eastern Time, on August 17, 2017. If necessary, the addendum will be issued by 4:00 p.m., Eastern Time, on August 24, 2017, and will be available online at www.brunswickcountync.gov.

2.8 It shall be the Offeror's responsibility to make inquiry as to the addenda issued. Any and all addenda shall become part of the specifications and all Offerors shall be bound by such addenda whether or not received by Offeror.

3. **PROPOSAL DOCUMENTS**

The proposal shall include the following documents:
1. A cover letter stating the Offeror's intent to bid on the Solution. Include the name, address, phone number, fax number, and Web site URL for your firm together with the name, address, phone number, fax number, and email for the project manager or person whom the County can contact in regard to the RFP.
2. A company overview, including the organizational qualifications to provide services for the Solution.
3. A summary of the expertise of the Offeror in providing the Solution and services as specified (including design, integration, testing, and support) that distinguish the Offeror from their competitors.
4. Resumes for key personnel who will have day-to-day responsibilities for the duration of the contract.
5. An implementation plan, as well as a description of the level of services to be provided at each stage. Include:
    a. A schedule detailing the tasks required to furnish the specified system in its entirety
    b. Proposed type of training and training schedules of employees and administrative staff; such as "Train the Trainer" or train by process or work group
6. Document a minimum of 5 years of comprehensive experience in public works/utility departments, with at least 20 departments using solutions provided by the Offeror.
7. Completed Appendices A – C, which address pricing, maintenance and support, the proposal form, and references.
8. Reference page (which is contained in Appendix B) that the County can use in the evaluation process. A minimum of five references of customers who are using the Solution (same version is preferred) as proposed for this RFP. Include the following information:
    a. Contact information, including names, telephone numbers, and email address for an individual in the customer organization responsible for the project.
    b. The length of time the customers have been utilizing the Solution.
    c. The customer's active applications of the Solution (Note: minimum of three water and wastewater utility customers are required to be listed).

4. **BASIS OF AWARD**

The award resulting from this Request for Proposals will be made to the Offeror that submits the response that best serves the needs of BCPU. The selection committee will evaluate the proposals based on the following criteria:

1. The ability to meet the functional requirements as stated in this RFP.
2. Demonstration of the proposed integrated Solution and subsequent interviews, as requested.
3. Successful history of the vendor's ability to provide similar system within the established RFP guidelines.
4. Immediate availability of hardware/software of the proposed Solution. (For example, the software must provide the features described through the most current release. Additional functionality coming in future releases must be separately noted).
5. Ease of use of the proposed Solution including customizable features.
6. Experience with the integration of third party software systems, including ESRI and CIS Infinity.
7. Qualified vendor staff with experience in deployment, integration, and support of Public Utilities operations.
8. Feedback from references.
9. Total cost, including any initiation fees and yearly maintenance fees.

5. **PROPOSED SCHEDULE**

The following are the tentative dates and timeline for major milestones related to this RFP:

Activity	Due Date
Issue Request for Proposals	July 31, 2017
Pre-Proposal Conference	August 10, 2017 - 10 a.m., local time
Deadline for Submitting Request for Information	August 17, 2017 - 4 p.m., local time
Issue Addendum, if necessary	August 24, 2017
Proposal Closing Date/Time	September 12, 2017 - 4 p.m. , local time
Software Demonstrations for Shortlisted Vendors	September 26-28, 2017
Contract Award / Notice to Proceed	October 17, 2017 (Approximate)
Completion/Go-live	April 1, 2018 (Approximate)

6. **ACCEPTANCE/REJECTION OF PROPOSALS**

6.1 Brunswick County retains the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in Brunswick County's best interest to do so. Brunswick County reserves the right to accept or reject any or all of the items in the proposal, and to

award the contract in whole or in part and/or negotiate any or all items with individual Respondents if it is deemed in Brunswick County's best interest. Moreover, Brunswick County reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of Brunswick County.

6.2 BCPU reserves the right to reject the proposal of any vendor who has previously failed in the proper performance of an award, has failed to deliver on time contracts of similar nature, who has been suspended or disbarred from doing business with Brunswick County, or who is not in a position to perform properly under this contract.

7. INCURRING COSTS

BCPU is not liable for any costs incurred in responding to this RFP, including but not limited to the cost of preparing and submitting the proposal, the cost of on-site demonstrations, or any other cost incurred prior to the execution of a formal agreement.

8. INSURANCE REQUIRED

8.1 During any work performed by the successful Proposer(s) on the premises of BCPU or otherwise, the successful Offeror(s) agrees to take such measures as will effectively prevent any accident to person(s) or property during or in connection with the work; and to indemnify and save harmless Brunswick County from all loss, costs, damages, expense, and liability for property damage and for bodily injuries to, or death of, any persons, including without limitation, as to both property damage and bodily injury, and the Offeror and BCPU and their representative agents and employees, occasioned in any way by the acts or omissions of the Offeror, or the Offeror's agents, employees, during or in connection with said work, excepting only property damage, bodily injury or death caused by the sole negligence of BCPU, its officers, agents or employees.

8.2 The successful Offeror shall maintain such insurance as will protect from claims under Workers' Compensation Acts and from any claims for bodily injuries, including death, either to its employees or others, and from all claims on account of property damage, which may arise in connection from said work.

8.3 Insurance required (minimum):
   A. One Million Dollars ($1,000,000.00) limit Comprehensive General Public and Professional Liability, Comprehensive Automobile Liability and Owner's Liability.

   B. One Million Dollars ($1,000,000.00) Malpractice Insurance per occurrence, Five Million Dollars ($5,000,000.00) aggregate.

   C. All Certificates of insurance and policies shall contain the following clause: "The insurance covered by this Certificate will not be canceled or materially altered, except after thirty (30) days written notice has been received by BCPU."

8.4 The insurance requirements will be effective for the life of any contract/agreement entered into by the Offeror and BCPU.

9. GENERAL TERMS AND CONDITIONS

9.1 Taxes – BCPU is exempt from Federal Excise Tax, State of North Carolina, and local sales tax. The Offeror must quote prices which do not include these taxes, unless by law the taxes must be a part of the price. Exemption certificates will be furnished upon request.

9.2 F.O.B. – All prices will be quoted F.O.B. Supply, North Carolina; delivery to BCPU's location shall be without additional charge.

9.3 Indemnification – BCPU, its officers, agents or employees shall be held harmless from liability from any claims, damages, and actions of any nature arising from the use of any service and/or materials furnished by the Offeror, provided that such liability is not attributable to negligence on the part of the using agency or failure of the using agency to use the materials in the manner outlined by the Offeror in descriptive literature or specifications submitted with the Proposal. BCPU will not indemnify the successful Offeror.

9.4 Patent Liability – The successful Offeror, at his own expense, will defend any suit which may be brought against BCPU to the extent that it is based on a claim that the goods furnished through a contract/agreement infringes a United States patent, and in any such suit will pay those costs and damages which are attributable to such claims and finally awarded against BCPU.

9.5 Limitation of Remedies – Any remedies in the Offeror's Proposal, to include Agreement, License Product Agreement, Terms and Conditions, Literature, etc., that may be considered in agreement to waive the legal rights of the citizens of Brunswick County may be considered cause for rejection.

9.6 All agreements related to the purchase and sale of any product pursuant to this bid document will include the following conditions: "Notwithstanding anything in this section to the contrary, any provision or provisions of this Section will not apply to the extent they are (it is) finally determined by a court of competent jurisdiction, including Appellate review if pursued, to violate the laws or Constitution of the State of North Carolina."

9.7 By submission of a signed Proposal, the Offeror certifies total compliance with Title VI and Title VII of the Civil Rights Act of 1964, as amended, and all regulations promulgated thereunder.

9.8 All contracts or purchase orders issued for this award will be governed by the laws of the State of North Carolina. If a dispute arises between the parties concerning any aspect of the contract or purchase order and it cannot be resolved by mutual agreement, any party may resort to resolution of the dispute by litigation in the state or federal courts for Brunswick County, North Carolina. The parties waive their right to a jury trial. Mandatory and exclusive venue and jurisdiction for any disputes shall be in state or federal courts for Brunswick County, North Carolina.

9.9 All contracts, purchase orders, and any documents or material obtained by BCPU may be subject to disclosure in whole or in part pursuant to North Carolina Public Records Law set out in G.S. 132 et seq. without regard to any provision contained in the document declaring information confidential.

9.10 To ensure compliance with the **E-Verify** requirements of the General Statutes of North Carolina, all Offerors, including any subcontractors employed by the Offeror, by submitting a bid or proposal or any other response, or by providing any material, equipment, supplies, services, etc., attest and affirm that they are aware and in full compliance with Article 2 of Chapter 64, (N.C.G.S. 64-26[a]) relating to the E-Verify requirements.

9.11 By submission of any bid or proposal, vendors/Offerors certify that as of the date of execution of this agreement or date of receipt of the purchase order, vendor/Offeror and/or subcontractors affirm they are not listed on the Final Divestment List created by the State Treasurer pursuant to N.C.G.S. 143-6A-4, Iran Divestment Act Certification. Contractor/vendor shall not utilize any subcontractor that is identified on the list.

10. ASSIGNMENT

Neither party to the contract shall assign the contract or subcontract it as a whole without the written consent of the other, nor shall the Contractor assign any monies due or to become due to him/her hereunder, without the previous written consent of BCPU.

END OF SECTION

II. PROJECT DETAILS

1. BACKGROUND

Brunswick County Public Utilities is located in Brunswick County, which is situated in southeastern North Carolina and contains over 125,000 residents in 847 square miles with over 40,000 customers. BCPU consists of Water and Wastewater Maintenance and Plant Facilities that include:

1.1   Water and Wastewater Infrastructure

- 1,030 miles of water distribution pipes

- Over 10,000 water valves

- Over 5,700 fire hydrants

- 570 miles of sewer collection pipes

- Over 6,500 sewer valves

1.2   Water and Wastwater Treatment and Pumping Facilities

- 6 wastewater treatment facilities

- 155 sewage pumping stations

- 2 water treatment plants

- 14 production wells

- 10 water booster pump stations

- 12 elevated or ground storage tanks

2. CURRENT SYSTEMS

BCPU currently utilizes a variety of applications to meet data management and business process needs. The Solution must be compatible and integrate with the following first two enterprise applications, while the remaining enterprise applications' data migration would be desirable:

APPLICATION	DESCRIPTION
CIS Infinity, 3.1	Customer Service information, billing and work order software
ESRI ArcGIS, 10.2.2 (upgrading to 10.4x)	Enterprise GIS mapping application
Microsoft Products (Access and Excel)	
Sensus Analytics	Meter reading software system

Citect SCADA (Supervisory Control and Data Acquisition) by Schneider Electric	Human Machine Interface (HMI) program that allows the wastewater plant to monitor and control automation machines and processes. Monitors pump and booster pump stations, lift station flow, current, voltage, and general performance
Wasp Barcode Technologies, 6.2	Inventory control application
Hach JOB Cal Plus, 2.9.7	Computerized Maintenance Management Software (CMMS) maintenance tracking and scheduling
Brunswick County Public Utilities Work Order Software	Water and sewer work order entry and tracking
AutoCAD	Design and mapping of infrastructure

3. **I.T. NETWORK**

Brunswick County has a Cisco based network containing both virtual and physical machines. The remote locations are provided network access either by fiber connections or radio links. BCPU prefers that the Solution be in a hosted environment such as Amazon or Microsoft Azure. New applications can be run on a Virtual Machine with Windows Server 2016 or higher, 64 bit. If the application does require a physical server, the cost of the server should be included in the estimated project total. The County's Management Information Services Department must be consulted to ensure that the operating system is compatible with the County's requirements.

4. **SERVICES REQUIRED**

The Public Utilities Department is procuring a software Solution that will help streamline operations, better coordinate work, improve asset knowledge, and manage inventory. Any software selected must be scalable to incorporate additional assets after initial implementation. Depending on the chosen Solution's licensing package options, the most economical choice will be made in terms of a set amount of licenses versus unlimited, concurrent licenses or enterprise agreements. BCPU has approximately 115 employees, of which approximately 75 are anticipated as users requiring login access.

The Solution is expected to perform as indicated below; however, these are minimum system requirements and best practices should be provided for consideration:

- **Service Requests and/or Work Orders**
  - Create a service request for internal and external work requests
  - External work order data integration with CIS Infinity with ability to:
    - Automatically extract new work orders hourly based on creation time/date stamp
    - Extract account number, customer name, contact information, service address, service order message, and existing meter and MXU numbers

- Push back into CIS Infinity database: status, assigned to department/user, notes, completion date/time, complete by whom, meter number, MXU remote number, initial or manual meter reading and multiplier
  - o Connect service request to subsequent work order to provide ability to update original requestor
  - o Manage, open, update, complete, and close activities
  - o Include costs for labor, material, parts, equipment, vehicles, tools, and outside resources
  - o Include asset ID on work order to create history
  - o Attach prior asset service requests to provide history of problems
  - o Route work orders to the field crews on iOS and Android mobile devices
  - o Schedule work to be done on a dashboard or calendar that allows the user to change the day, time, or crew by activating the work order from the dashboard or calendar view
  - o Link several assets to a single work order
  - o Track work order status in real time
- **Asset Register**
  - o Include vertical and horizontal assets
  - o Include asset characteristics and nameplate data as required
  - o Allow the creation of asset hierarchies
  - o Ensure that each asset has a unique ID
  - o Attach images and documents to an asset record
  - o Map assets using ArcGIS
- **Preventive Maintenance**
  - o Set up PM by various criteria such as by date, hours, readings, or miles
  - o Include appropriate labor, materials, parts, and other required work components
  - o Set various PM start date types, e.g. days, weeks, months, etc.
- **Inventory/Parts**
  - o Designate any area or vehicle as a storeroom or warehouse
  - o Include vendor and manufacturer information with a part
  - o Provide a barcode/scanning solution
  - o Lower stock-on-hand figure based on use through a work order
  - o Allow parts to be transferred between storage areas
  - o Store manufacturer and vendor history
  - o Assign bin location in a warehouse
  - o Inform user when minimum parts level is reached
- **Asset Inspections Reports**
  - o Store information and images about various asset inspections
  - o Map asset inspections using ArcGIS
  - o Apply a condition assessment rating to an inspection found defect
  - o Create a condition assessment rating report
- **Asset Management Key Performance Indicators or Level of Services Statements**
  - o Allow users to create reports

- o Store report queries and change as required
- o Review all reports before they are printed
- o Include predefined general system reports that can be customized by the user
- o Create and update key performance indicators (KPI) and adjust effective service life based on age, condition ratings, and criticality
- o Send reports to printer, file, or email
- o Provide compatible file formats for exporting reports
- o Map critical condition and performance indicators of assets

- **Workflow Management**
  - o Store and use business process workflows
  - o Support rules-based workflow routing
  - o Create document packages such as work orders, maps, special instructions, safety instructions, and other for routing and approval

4.1 **Project Goals, Requirements, and Offerors' Responsibilities**

The following goals, project requirements, and Offerors' proposal responsibilities have been set for the realization of an Asset and Work Order Management System (the "Solution") and to assist with vendor selection of this implementation:

4.1.1 **Project Goals**

4.1.1.1 The Solution shall eliminate data input redundancy so that unique data has one source of entry and storage at the database level. By integrating with CIS Infinity software, pertinent information entered for an account or work request by Customer Service automatically imports to the Solution and information can be transmitted back to CIS from the requests or work orders.

4.1.1.2 The Solution shall minimize or eliminate the need for paper print outs through the workflow to allow the data to be maintained in an electronic format as much as possible.

4.1.1.3 The Solution shall be flexible to meet changing business needs allowing the County and its customers to stay in compliance with new and sometimes changing governmental policies. This includes governmental policies at the County, State, and Federal jurisdictions.

4.1.1.4 The Solution shall allow for configuration of workflows by approved BCPU staff to tailor any out-of-the-box workflows to meet the needs of each division's asset and work order management business processes.

4.1.2 **Project Requirements**

4.1.2.1 The Solution shall provide an intuitive user-interface for data input and overall system functionality through the use of built-in help features, intuitive interface guiding users through system workflows, and other applicable features designed to improve the user experience of the Solution.

4.1.2.2 The Solution shall allow for execution of data intake, review, approval, and associated processing of the data.

4.1.2.3 The Solution will meet to its best ability the set of m i n i m u m

requirements as defined in **Section 4. SERVICES REQUIRED** (above) and as per the verification process to be conducted with the County and the Successful Offeror.

4.1.2.4   The Solution shall have the ability to perform tasks such as, but not limited to intake, capture, review, storage, and retrieval of asset data. If the Solution will use a Web interface, it shall be browser agnostic and platform independent. In the event that an Offeror's Solution is not browser independent, the technical proposal shall indicate which browsers the Solution supports.

4.1.2.5   The Solution's out of the box functionality not specifically called out in this RFP but considered a standard offering with the product shall be made available to BCPU as part of this purchase.

4.1.2.6   The successful Offeror will supply software that meets the Services Required as defined in this RFP and in the final project requirements developed for this project.

4.1.2.7   The Solution will be configured in such a way as to streamline processes that are currently performed via paper transmittals, spreadsheets, and independent databases and to interface with existing County Customer Service system that processes account information, payments, credits, and refunds.

4.1.2.8   The successful Offeror will configure the Solution to generate all reports presently being generated by BCPU legacy asset and work order systems and reports recognized as industry standards, through a versatile, robust, and user friendly query and reporting tool.

4.1.2.9   The successful Offeror shall support the implementation of the new AWOM Solution to ensure a successful outcome and provide post go-live technical and user support. The successful Offeror shall, based on the understanding of BCPU's needs and information gathering, offer hands-on system integration and implementation experience to include training of staff either directly or via a 'Train the Trainer' approach.

4.1.2.10   The successful Offeror will migrate all data deemed to be required by BCPU from the current legacy systems to the selected proposed solution with help from BCPU or its representatives. Historic records of assets and work orders will be retained and migrated into the system in order to make full use of the new system's ability to manage assets and make the best optimal decision on asset replacements, renewals, or retirements. BCPU realizes the need to use dual systems during implementation for a short duration since the entire BCPU asset management system will not be fully incorporated on day one. Access to the existing databases will be provided to the successful Offeror upon contract initiation.

4.1.2.11   The successful Offeror shall support BCPU's transition and help BCPU's existing user base adapt to the new Solution and provide deliverables that meet the following minimum acceptance criteria:

•   Be presented in a document format appropriate to the type of deliverable (e.g. MS Word Format, MS Excel, etc.) and be organized in a way that facilitates ease of organizational understanding of the flow of information presented.

- Meets the acceptance criteria for that deliverable, including any identified policies, functional or nonfunctional requirements, or industry standards.

4.1.2.12 The successful Offeror shall provide ongoing operations and maintenance support of the Solution during the term of the contract.

4.1.2.13 The successful Offeror is expected to deliver all proposed deliverables as described in this RFP and agreed upon in the contract.

4.1.2.14 BCPU will evaluate the deliverables and verify that the successful Offeror has met the required functionality in the software in order to release milestone-related payments to the successful Offeror.

4.1.2.15 The selected Solution will support industry standard security measures to secure the data and user information stored or transacted within the system.

4.1.2.16 BCPU is open to implementing business processes proposed by the successful Offeror if they are demonstrably more efficient and effective over current business processes. The selection of the successful Offeror's proposed processes shall require the review and approval of BCPU's AWOM coordinators.

4.1.3 Offerors' Responsibilities

4.1.3.1 The successful Offeror shall possess demonstrated expertise (subject matter knowledge and relevant experience) in the successful implementation of a COTS AWOM system that is based on commercially available, fast relational database management systems such as, but not limited to, Oracle, Microsoft SQL Server, etc.

4.1.3.2 Other configurations deemed necessary by the Offeror shall be addressed by the Offeror in the Proposal. Workflows are important to BCPU and successful implementation of them will be a factor in the vendor selection process. It is encouraged for the Offeror to provide expertise in workflows and configurations in order for BCPU to be efficient and excel in Asset and Work Order Management.

4.1.3.3 The successful Offeror shall show in the Proposal its expertise in the configuration, implementation, quality assurance, coordination, performance testing, system cutover, and acceptance stages of the implementation of the AWOM Solution.

4.1.3.4 The successful Offeror will propose transition requirements that outline a clear understanding of the current data architecture and present the administrative and architectural needs of the new Solution. These transition requirements shall include but not be limited to:

- Installation

- Configuration

- Staging or Test Environment

- Migration of Data to Production Environment

- Production Deployment Methodology (phased component rollout vs. all-at-once deployment) of Proposed Solution

- Deprecation of Existing Systems

- Training of BCPU Administrators on System Administration and Configuration

4.1.3.5   The Offeror's Proposal shall describe in detail the security architecture of the Offeror's solution including but not limited to user authentication, data security at rest, data security in transit, and the Offeror's recent compliance with SOC Type I, FedRAMP of NIST 853 audit (if applicable). The County will consider equivalent security architectures for the purposes of this RFP.

4.1.3.6   BCPU may require the configuration of processes by the successful Offeror in addition to the processes identified in this RFP. These should be priced optionally per process in the Proposal and not included in the base cost. The Offeror is suggested to recommend such processes in its response.

4.1.3.7   The successful Offeror shall have support capabilities (preferably in-house), a technical team dedicated to this project that has successfully implemented a similar project, and a technical training team to train a group of BCPU personnel to be Tier 1 support for other BCPU and County personnel.

4.1.3.8   The successful Offeror shall propose a robust training program that accounts for all types of necessary training and allows for a flexible timetable to better maximize the training results. The Offeror is encouraged to recommend a training program to ensure that a knowledge transfer will occur and that BCPU staff and management has confidence in the new system.

END OF SECTION

APPENDIX A – PRICING INFORMATION FORM

Pricing Information

Software and Related Implementation Costs

#	Description	Quant.	Unit	Unit Price	Extended Price	Comments
1.	Per User Fee (i.e. Seat License)	115	Ea.	$	$	

<div align="center">OR</div>

#	Description	Quant.	Unit	Unit Price	Extended Price	Comments
2.	Enterprise License Cost (unlimited)		LS	$	$	

#	Description	Quant.	Unit	Unit Price	Extended Price	Comments
3.	Initial cost of software solution only (If applicable)		LS	$	$	
4.	Software setup and configuration costs to operate the system including functionality, planning, setup, and configuration planning		LS	$	$	
5.	Hosting fees (if applicable)		LS	$	$	
6.	Required hardware costs (if applicable)		LS	$	$	
7.	Technical support		LS	$	$	
8.	Training plan Training		LS	$	$	
9.	Transition support component Transition support deployment		LS	$	$	
10.	Project initiation and set up		LS	$	$	
11.	Project management		LS	$	$	
	Subtotal Software and Related Costs (Items 1/2 – 11)		**LS**	**$**	**$**	

3rd Party Software Costs

#	Description	Quant.	Unit	Unit Price	Extended Price	Comments
12.	Required 3rd Party Software	115	Ea. or LS	$	$	
13.	Required 3rd Party Software	115	Ea. or LS	$	$	
	Subtotal 3rd Party Software Cost (Items 12 – 13)		**LS**	**$**	**$**	

Customization Costs

#	Description	Quant.	Unit	Unit Price	Extended Price	Comments
14.	Customization Required		LS	$	$	
15.	Customization Required		LS	$	$	
	Subtotal Required Customization (Items 14 – 15)		**LS**	**$**	**$**	

Data Migration Costs

#	Description	Quant.	Unit	Unit Price	Extended Price	Comment
16.	Data Migration Planning & Preparation		LS	$	$	
17.	Existing Data Migration include testing & pilots		LS	$	$	
	Subtotal Data Migration Costs (Items 16 – 17)		**LS**	**$**	**$**	

Interfacing Costs

18.	Interfacing Planning and Preparation		LS	$	$	
19.	Interfacing with Existing Systems include testing & pilots		LS	$	$	
20.	Interfacing with Existing Systems include testing & pilots		LS	$	$	
	Subtotal Interfacing Costs (Items 18 – 20)		LS	**$**	$	

**Annual Maintenance Cost/Cost of Ownership (after the initial installation and support)
For a Four-Year Period**

#	Description	Quant.	Unit	Unit Price	Extended Price	Comment
21.	Software Solution Maintenance Year 1		Yr.	$	$	
22.	Software Solution Technical Support Year 1		Yr.	$	$	
23.	Software Solution Maintenance Year 2		Yr.	$	$	
24.	Software Solution Technical Support Year 2		Yr.	$	$	
25.	Software Solution Maintenance Year 3		Yr.	$	$	
26.	Software Solution Technical Support Year 3		Yr.	$	$	
27.	Software Solution Maintenance Year 4		Yr.	$	$	
28.	Software Solution Technical Support Year 4		Yr.	$	$	

Annual Maintenance Subtotal (Items 21, 23, 25, 27)		4 Year	$	$	
Annual Technical Support Subtotal (Items 22, 24, 26, 28)		4 Year	$	$	

Note: The Cost sections above are guides to providing detailed pricing; however, they are in no way limited to just the categories shown. Additional cost information can be provided as an attachment or addendum.

Grand Total for All Items Inclusive (Items 1 or 2, and 3 - 28)

$_____
(Add together all "extended" lines. Provide additional explanations as needed.)

APPENDIX B – REFERENCES FORM

References

List below current business references for which you have performed work similar to that required by this proposal. Please provide this information for each partner in a Joint Venture and for all Subcontractors when applicable.

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

Facility: _____

City, State, Zip Code: _____

Telephone Number: _____

Contact Person: _____

Contact Email: _____

Date of Service: _____

Active Applications of the Solution: _____

_____

APPENDIX C – PROPOSAL FORM

PROPOSAL

THIS PAGE MUST BE INCLUDED

The UNDERSIGNED hereby declares that he/she or they are the only person(s), firm, or corporation interested in this proposal as principal, that it is made without any connection with any other person(s), firm, or corporation submitting a proposal for the same.

The UNDERSIGNED hereby declares that they have read and understand all conditions as outlined in the Request for Proposals, and that their Proposal is made in accordance with same.

The UNDERSIGNED hereby declares that any person(s) employed by Brunswick County Public Utilities, who has direct or indirect personal or financial interest in this proposal or in any portion of the profits that may be derived therefrom, has been identified and the interest disclosed by separate attachment. (Please include in your disclosure any interest which you know of. An example of a direct interest would be a County employee who would be paid to perform services under this proposal. An example of indirect interest would be a County employee who is related to any officers, employees, principal or shareholders of your firm or to you. If in doubt as to status or interest, please disclose to the extent known).

COMPANY NAME: _____
(Individual, Partnership, Corporation, Joint Venture)

AUTHORIZED SIGNATURE: _____ DATE: _____
(Officer, Authorized Individual or Owner)

PRINT NAME & TITLE: _____

ADDRESS: _____

_____

TELEPHONE: _____ FAX: _____

EMAIL: _____ FEDERAL TAX NUMBER: _____

NOTE: All Proposals must bear the handwritten signature of a duly authorized member or employee of the organization making the Proposal. This sheet must be signed and returned with the proposal package.