

OUTAGAMIE COUNTY
REQUEST FOR PROPOSAL
FOR
CONSULTING SERVICES
FOR
SCHEDULING SOFTWARE / TIME & ATTENDANCE SYSTEM

Due Date: June 14, 2024 – 1:00 pm CT

Deadline for Vendor Questions – May 23, 2024 at 12:00 pm CT (reference Section 3.0 for details)

1.0 Introduction and Background

Outagamie County's IT Department is seeking a technical consultant to assist the County in purchasing, and possibly implementing, a new scheduling software / time and attendance system which will integrate with our existing Tyler/Munis and JD Edwards systems.

The County's current system is Kronos and the current version of the system we are on will no longer be supported as of March 2027, thus we are seeking a new solution to be implemented with a go-live date no later than January 1, 2027.

The system will be used by the departments within the County that do not work a traditional Monday – Friday day shift. We have the following users of the current system and would expect the same number of users in the new system:

Highway Department – 100+ users

Brewster Village (long term care facility) – 316 users

Sheriff's Department (patrol, corrections and telecommunication) – 274 users

IT (for administrative purposes) – 4 users

The new system will also be utilized by our Health & Human Services Department and Airport who are not currently using Kronos. We expect 486 users from Health & Human Services and 74 users from Airport.

2.0 Scope of Services

The consultant would be hired for various phases of the project and priced per phase. The continuation onto each phase of the project is at the discretion of the County.

Phase 1

The consultant will write the technical specifications required for a new system to be used in the forthcoming software system RFP. The consultant shall meet with staff from the Highway Department, Brewster Village, Sheriff's Department, Health & Human Services and Airport to gain understanding for their needs in a system. The consultant shall also meet with the IT Department to understand our current environment and to determine which solutions would be suitable for our environment.

The technical specifications shall be laid out in a format that lists criteria the system must have in addition to desirable functionality of the system in a priority order.

During Phase 1, the consultant will also be required to assist in answering any questions that may arise from software vendors during the RFP process for the new system.

Lastly, during Phase 1, the consultant shall put together the pricing form for the new system. This should include various components such as interface costs, maintenance and support, etc.

Pricing for Phase 1 shall include all tasks and any travel fees. The fee will be a lump sum without any reimbursable expenses.

Phase 2

Phase 2 will begin once proposals for a new system are received and continue through contract signing for a new system.

The consultant, even though they will not be an evaluator of the system, shall review all proposals

and provide a synopsis of each proposal referencing key points and outlining the capability of the proposed systems compared to our required and desired features. They will also provide a pricing file outlining a 10-year total system cost which shall also include any additional hardware the County would have to purchase.

The consultant shall communicate, both directly on behalf of the County or through guidance to the County, with various vendors on technical questions we have in their proposal.

After evaluation of the systems, the consultant shall facilitate up to 3 vendor demonstrations. This will include writing the scripts for demonstration.

Upon selection of the system, the consultant will assist the County in contract negotiations.

Pricing for Phase 2 shall include all tasks and any travel fees. The fee will be a lump sum without any reimbursable expenses.

Phase 3

Phase 3 will begin after the contract is signed and continue through final acceptance of the system.

The consultant will work with the County regarding change management for the new system.

The consultant may oversee implementation and act as the project manager. Or there could be a narrower scope of services for implementation.

We understand Phase 3 tasks could not be priced until we determine the involvement from the consultant for this phase and the system selected. No pricing will be required for this phase, we would work with the awarded consultant to determine a scope of services and fee. However, in order to submit a proposal you must be able to provide these services.

3.0 Deadline for Vendor Questions

The deadline for vendor questions will be noon CT May 23rd. Email all questions to Nicole.Schoultz@outagamie.org. Questions will be answered online, at www.outagamie.org under Bids & Proposals then this project by end of day May 31st.

4.0 Independent Requirement

It is our intent to select a consultant that is independent and objective in all aspects of this project. The selected company cannot be directly or indirectly associated with a firm that sells Schedule / Time & Attendance software. If the consultant is directly or indirectly associated with a software provider, you will be automatically excluded from consideration.

5.0 Interviews

The County may interview selected firms via Zoom. We have reserved the afternoon of July 9th for interviews. Vendors will be notified by end of day June 26th they have been selected for an interview.

6.0 Insurance and Indemnification

Reference Attachment A for the requirements of the awarded vendor. This form must be completed and returned with your proposal. However, only the awarded firm will need to supply their Certificate of Insurance.

7.0 **Confidential Information**

Any proposals submitted in conjunction with this request will become a public record after award and consequently, open for complete public inspection. Proposals may not be marked with a blanket confidential disclosure.

Information cannot be kept confidential unless it is a trade secret. Trade secret is defined in §134.90(1)(c), Wis Stats. As follows: "Trade secret" means information, including formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

Due to the nature of this project, we do not foresee any items being marked confidential. However, if there are confidential or proprietary sections of proposals which should be exempted from this requirement, Proposer(s) must complete Attachment B. Only items specifically referenced on Attachment B will be considered. A blanket confidential statement on a proposal will not be honored.

Notification of the county's determination on such requests will be made prior to release of any of the information in the proposal.

8.0 **Proposal Submittal**

Your proposal should be outlined in the order referenced below in one PDF (through Section 5).

Introduction

This section should include an overall description and understanding of the project. This section must also include the statement that the consulting firm is independent and is not associated directly or indirectly with a software provider. List the primary contact and secondary contact for any questions relating to the proposal. Include both email and phone number.

Section 1 — Company Overview & Organizational Qualifications

This section should provide introductory information about the company's history, including years of operation, services offered, and corporate structure including an organizational overview, number of employees, locations of offices, key contacts, and client base. Indicate your company's particular abilities and qualifications that relate specifically to the scope of service for this project. Indicate if you intend to use any subcontractors in this project.

Section 2 — Staffing / Resumes of Key Staff

This section should include information pertaining to project management and the staff that will be completing the consulting services. Include the resume(s) of key Individuals who will be assigned to this project. Specifically include their experience in similar type projects. If more than one staff will be assigned to this project, indicate which phases of the project they will be involved in. Describe the process we would follow if there are performance concerns and explain your contingency plan if any staff become unavailable during the course of the project.

Section 3 — Project Timeline

Detail the overall and specific approach your company would take to lead and assist in this project. Include a breakdown of on-site and remote work. Separate the approach and timeline by the three different phases included in the scope section of the proposal. Include a projected timeline with major milestones for each phase.

For a timeline, we anticipate a notice of award by July 17th and the consultant could plan on a 6 week process after that to come to an agreeable contract. As stated in Section 1.0 our current system will no longer be supported as of March 2027, so the new system will need to be fully implemented with a go-live date no later than January 1, 2027.

Section 4 — Experience in Similar Projects

Provide a minimum of three and a maximum of five similar projects that were completed within the past five years. Include project description, date of project, client name, address, contact name with phone number and email. Governmental clients are preferred in this section.

Section 5 — Additional Information

This section shall include any additional information the consultant deems necessary that is relevant to this project. This section shall be limited to five pages.

Separate PDF — Forms

Provide the following forms in one PDF which should be a separate PDF from the information above:

Proposal & Pricing Form

Completed Attachment A

Completed Attachment B

Acknowledge of any addendum issued (a form with the addendum will be provided to include in this section if one is issued).

Failure to include all information in the order requested may result in the rejection of your proposal.

9.0 Purchasing Policy & Procedure Information

Nicole Schoultz

Procurement Coordinator

(920) 832-6083

nicole.schoultz@outagamie.org

10.0 Clarification and/or Revisions to the Specifications and Requirements

Proposer must examine the RFP documents carefully and before submitting a Proposal may request clarification. A Proposer's failure to request additional information or clarification shall preclude the Proposer from subsequently claiming any ambiguity, inconsistency, or error.

The County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addendum prior to the Proposal due date. Proposers should rely only on the representations, statements or explanations that are contained in this RFP and the written addendum to this RFP. Where there appears to be a conflict between the RFP and any addendum issued, the last addendum issued will

prevail.

It is the Proposer's responsibility to assure receipt of all addenda, which would be posted on the County's website at www.outagamie.org then Bids & Proposals under this project. Upon posting, such addenda shall become part of the RFP and binding on Proposer(s).

12.0 **County Reservation**

- a. This proposal request does not commit Outagamie County to make an award or to pay any costs incurred in the preparation of a proposal in response to this request.
- b. The proposals will become part of Outagamie County's files without any obligation on Outagamie County's part.
- c. The proposer shall not offer any gratuities, favors, or anything of monetary value to any official or employee of Outagamie County for any purpose.
- d. The Company shall report to Outagamie County any manufacturer product price reductions, model changes, and product substitutions. No substitutions are allowed without prior approval from Outagamie County.
- e. Outagamie County has the sole discretion and reserves the right to cancel this proposal and to reject any and all proposals received prior to award, to waive any or all informalities and or irregularities, or to re-advertise with either an identical or revised specification.
- f. Outagamie County reserves the right to request clarifications for any proposal.
- g. Outagamie County reserves the right to select elements from different individual proposals and combine and consolidate them in any way deemed to be in the best interest of Outagamie County.

13.0 **Closing Date**

Proposals will be received up to 1:00 pm CT June 14, 2024.

14.0 **Proposal Submittal**

Email proposals to: Nicole.Schoultz@outagamie.org

If you are using a fileshare site to deliver your proposal, it shall not require registration to download.

15.0 **Taxes**

Outagamie County is exempt from Federal Excise Tax (39-6005724), Wisconsin Sales Tax (ES 41005), but if there is a tax, such as local or county, it must be shown in the proposal.

16.0 **Method of Procurement**

The method for this procurement is competitive proposal, pursuant to Chapter 22 of the Outagamie County Code of Ordinances.

17.0 **Venue**

This agreement will be governed and construed according to the laws of the State of Wisconsin. This agreement is performable in Outagamie County.

18.0 **Status of Proposal**

Upon award, proposals will be considered public record and details will be posted online. Information on status could be obtained from Outagamie County's web site www.outagamie.org than **Bids/Proposals**.

OUTAGAMIE COUNTY PROPOSAL & PRICING FORM
Consulting Services

Proposals Due: June 14, 2024 - 1:00 p.m. CT

Email Proposals To: Nicole.Schultz@outagamie.org

Reference the lump sum cost for all tasks for Phase 1 and Phase 2. Note, there will be no reimbursable expenses, thus pricing must include any associated travel.

Phase 1: \$ _____

Phase 2: \$ _____

Include all information as referenced in Section 8.0

Firm Name: _____

Authorized Signature: _____

Print name: _____

Title: _____

Date: _____

Address: _____

Telephone: _____

E-mail: _____