
Request for Proposal

Enterprise Finance, Human Resources and Payroll Software, and Related Services

(RFP #2016-01)



**San Bernardino Community College District
114 South Del Rosa Drive
San Bernardino, CA 92408**

RFP Released: June 22, 2015

Request for Proposal
Enterprise Finance, Human Resources and Payroll Software, and Related Services
Request for Proposal (RFP) #2016-01

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Request for Proposal
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Introduction

The purpose of this document is to invite vendors to participate in the San Bernardino Community College District (District) procurement process for acquiring Enterprise Finance, Human Resources and Payroll software, and related services. Specifically, the goal is to solicit proposals for products and services that address the District's needs.

Profile of the San Bernardino Community District

The District is one of 72 community college districts within the California Community College system, the largest educational system in the world, which encompasses 112 community colleges.

The District has an 86-year history of providing its community and students with quality and affordable vocational certificates, associate's degrees, and preparation for transfer to a four-year college or university through San Bernardino Valley College (SBVC) and Crafton Hills College (CHC). In addition, the Economic Development and Corporate Training Division (EDCT) and KVCR TV-FM provide professional development and cultural and educational information to the community at large.

As part of the District Strategic Plan approved by the Board of Trustees on April 9, 2015, Goal 4 of the Strategic Plan was to address District Operational Systems. Specifically the goal stated key objective was:

"Improve the district systems to increase administrative and operational efficiency and effectiveness with an emphasis on student records, human resources, facilities, technology, financial systems, and other workflow operational systems."

Key Strategies to achieve the objective were:

1. Administrative Efficiency/Effectiveness
 - a. Identify the dependencies for integrating existing major enterprise resource programs
 - b. Integrate major enterprise resource programs
 - 1) Align policies and procedures
 - 2) Purchase Human Resource, Fiscal, and other ERP modules as necessary to become independent from County systems and have a fully integrated administrative applications environment"

This procurement is targeted at helping the District achieve this Goal within the District's Strategic Plan.

The Intent of the District

The District is seeking vendor proposals for the procurement, implementation, and ongoing success of enterprise Finance, and Human Resources and Payroll application software. In addition, the District seeks a system that includes ancillary products (e.g., database management systems) and professional services.

The District is eager to enhance its efforts in the following areas:

- Streamlined business processes
- Improved services for students, faculty, staff, and vendors
- Reduce the number of disparate systems needing to be interfaced
- Greater access to critical resources
- Improved productivity through the use of web-enabled and mobile applications
- Responsiveness to state/federal/internal reporting requirements
- Efficient access to data, information, and transaction processing
- Improve analytical and statistical analysis of data over time

At a minimum, it is the District's intent to purchase a financial information system and human resources/payroll system. In addition to these main applications, the District will also consider the grant accounting and contract management systems. Ideally, the proposed modules should share use of an integrated database management system that would also be part of this procurement. In the event that a single vendor solution cannot meet the requirements of both the Finance and Human Resources/Payroll areas of the District, the District reserves the right to procure solutions from multiple vendors in a "best of breed" approach as long as the technologies of those solutions provide for effective and real-time integration through Web Services and robust APIs.

As needed, the District will acquire related software products (e.g., compilers, report writers). Finally, the District will procure as-needed services for training, functional consulting, project management, data conversion, software customization, software integration and maintenance, etc.

This RFP includes a presentation of general system requirements and technical requirements. Vendors are encouraged to be as responsive as possible to each item within this document.

Procurement Process

The District's procurement process will entail four major steps:

Step One:

Vendors will be invited to submit proposals in response to this RFP. Proposals must at a minimum meet the District's mandatory requirements, as listed in the "**Important Criteria for Proposed Software**" section of this RFP, and should focus on products and services that best satisfy the District's needs, as presented in this RFP. No cost information is desired from vendors in Step One of the procurement process.

Step Two:

The District selection committee will evaluate vendors' written responses with respect to the District's needs and important criteria, as presented in this RFP. Qualified vendors will be invited to continue in the procurement process.

Step Three:

Qualified vendors will be asked to perform in-depth product demonstrations. Such demonstrations will be based upon the District's specific functional needs and requirements.

Step Four:

After a thorough evaluation of vendors' proposals and on-site demonstrations, the District will solicit proposed pricing from qualified vendors. Furthermore, the District may ask qualified vendors to refine their proposals for various products and services. At the conclusion of such a process, the District will make a final recommendation to the District's Governing Board to authorize a contract.

RFP Instructions and Requirements

Below are instructions and requirements for all vendors. The District will not consider a vendor's proposal unless it is consistent with all material instructions and requirements.

- The District has engaged the services of Strata Information Group (SIG) to assist in this procurement process. All vendors shall consider Harold George of SIG as sole point of contact for all communication throughout the entire selection process. Harold can be reached at:

*Harold George
General Manger, Professional Services
Strata Information Group
3935 Harney St, Suite 203
San Diego, CA 92110
210-364-1349 – Cell
george@sigcorp.com - Email*

Proposal Information

Submittal Deadline: **3:00 PM, Thursday, July 16, 2015**

Place of Bid Receipt: San Bernardino Community College District
Business Services
114 South Del Rosa Drive
San Bernardino, CA 92408

Mailing Address: San Bernardino Community College District
Attn: Jason Oberhelman
Purchasing Agent
114 South Del Rosa Drive
San Bernardino, CA 92408

Proposals will be received up to the above-indicated time and date. Late proposals will not be accepted and will be returned unopened. Proposals may be delivered in person, by U.S. mail, or courier services. Fax proposals are not acceptable. Proposals must be submitted in an envelope clearly marked with the following information: Enterprise Finance, Human Resources and Payroll Software, and Related Services (RFP #2016-01).

Proposals shall be binding upon the provider for 180 calendar days following the award recommendation date. All terms and specifications included in or appended to this solicitation apply to any subsequent award.

Number of Copies: Submit four (4) copies of the proposal. An electronic copy in MS-Word and PDF formats on a flash drive must also be provided. Brochures and other promotional materials are not necessary unless you consider them to be the only way to convey your services.

- Each proposal shall conform to the format presented in Appendix A. Proposals shall include tabs at each identified section, and all information shall be presented in the order that is identified in Appendix A.
- Each proposal shall include a Non-Collusion Affidavit signed by the vendor with his/her usual longhand signature. Proposals by partnerships must include the names of all partners and be signed in the partnership name by a general partner with the authority to bind the partnership in all relevant matters. Proposals by corporations must include the legal name of the corporation followed by the signature of a person who is authorized to bind the corporation. The name of each signatory shall be typed or printed below the signature. When requested by the District, satisfactory evidence of the authority of all those who signed the proposal shall be furnished.
- Proposals may be withdrawn by a vendor prior to July 16, 2015, by submitting a written request to the District. Thereafter, a vendor shall not be relieved of the proposal submitted without the District's consent or vendor's recourse to Public Contract Code 5100 et seq.
- All addenda issued prior to July 16, 2015, shall form a part of the specifications issued to vendors for the preparation of their proposals.
- The District reserves the right to reject any or all proposals, or any portion or combination thereof. In addition, the District reserves the right to waive any irregularity or informality within the proposal or procurement process.
- Section 508 Compliance statement: Vendors bidding on this proposal must be willing to accept the following statement as part of any agreements that may be entered into with the District's:

"Vendor hereby warrants that the products or services to be provided under this agreement comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794d), and its implementing regulations set forth at Title 36, Code of Federal Regulations, part 1194. Vendor agrees to promptly respond to and resolve any complaint regarding accessibility of its products or services, which is brought to its attention. Vendor further agrees to indemnify and hold harmless the San Bernardino Community College District, the Chancellor's Office of the California Community Districts, and any California community college using the vendor's products or services from any claim rising out of its failure to comply with the aforesaid requirements. Failure to comply with these requirements shall constitute a breach and be grounds for termination of this agreement."

- The award of a contract to a qualified vendor, if made by the District, will be based upon a comprehensive review and analysis of each proposal. The District shall be the sole judge of the merits of proposed products and services. The District, alone, shall determine its best interests and act accordingly. All vendors shall abide by the decisions of the District.
- Upon the District's request, a vendor shall submit satisfactory documentation of its financial resources, experience in providing relevant products/services, personnel who are available to perform with respect to the proposed contract and any other desired evidence of the vendor's qualifications.
- Vendors are entirely responsible for any expenses that are associated with their participation in the procurement process. The District shall have no responsibility.
- The District reserves the right to perform whatever research it deems appropriate in order to assess the merits of any vendor's proposal. Such research may include, but not necessarily be limited to, discussions with outside consultants, interviews with the vendor's existing clients, and analysis of industry reports.
- The District reserves the right to seek clarifications and follow up information from vendors.
- Vendors are hereby advised that the District is bound by open records laws and policies when it receives vendor-submitted materials. Any information that constitutes a trade secret and that a vendor wishes to declare confidential should be expressly noted as such at the top of each relevant page and be in compliance with all public agency contract code requirements for permitting exclusion.
- In the event of litigation, the related matters shall be governed by and construed in accordance with the law of the State of California. The venue shall be with the appropriate state or federal court located in San Bernardino County, California.
- The vendor selected by the District will be required to execute a formal contractual agreement based upon the terms and conditions included in this RFP. A draft contract may be provided as consideration in the development of the Agreement. All contract documents are subject to the approval of the District and its legal counsel. Electronic approval of terms and conditions upon sign-in will not be binding. All contract amendments must be fully executed between those identified as signatory by each party.
- Each vendor and subcontractor, if any, must possess all appropriate and required licenses or other permits to perform the work as identified in the contract documents. Upon request, each vendor shall furnish the District with evidence demonstrating possession of required licenses and/or permits.
- The vendor shall not discriminate against any prospective or active employee engaged to perform any work because of race, color, ancestry, national origin, religious creed, sex, age, disability, or marital status. The vendor agrees to comply with applicable federal and state laws including, but not limited to, the California Fair Employment and Housing Act, beginning with Government Code Section 12900 and Labor Code Section 1735. In addition, the vendor agrees to require compliance with this provision by any subcontractor.

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- No interest in the contract shall be transferred to any other party without the permission of the District's Governing Board.
 - The vendor agrees to indemnify and hold harmless the District from any claim that arises out of its failure to comply with the Rehabilitation Act of 1973, as amended.
 - In accordance with the provisions of Section 3700 of the Labor Code, the successful vendor shall secure the payment of compensation to its employees. The vendor hereby acknowledges, and by submitting a proposal, agrees to the following statement:

"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 document."

- Insurance: Vendor shall not commence work until it has obtained the insurance required herein and has submitted proof of such coverage to the District. Vendor shall not allow any subcontractor, agent, or employee to commence work on the contract without proof of same. Coverage must be secured and maintained for the duration of the contract.
 - (a) Workers' Compensation Insurance not less than the statutory limits and including employer's liability coverage limits not less than \$1,000,000.
 - (b) Comprehensive Commercial General Liability Insurance with limits not less than \$2,000,000 per occurrence.
 - (c) Comprehensive Automobile Liability Insurance with limits not less than \$1,000,000 per occurrence for all owned, non-owned and hired vehicles.

The insurance certificates for (b) and (c) must list the District as additional insured, as follows: ***San Bernardino Community College District, its Board of Trustees, officers, agents, representatives, employees, and volunteers are added as additional insured.*** The certificate must include a copy of the additional insured endorsement that amends the insurance policy.

- The District does not discriminate with regard to race, color, gender, national origin, or disability in the awarding of contracts.
- Please fill out and include the local vendor preference form and include the necessary documents if your organization qualifies.
- The District encourages the submission of proposals from all vendors who can meet the mandatory requirements set forth in this RFP.

Existing Applications and Information Technology at the District

General Background

The District supports a portfolio of administrative applications that provide services district-wide to students, faculty, and staff. This portfolio includes the Ellucian Colleague® Student Information System used by Admissions, Registration, Academic Records, Student Accounts, and Financial Aid; PeopleAdmin©, version 7, for applicant tracking; Human Resources systems utilized EPICS (Employee Personnel Information Consortium System), leave tracking system (LeaveTraQ®), payroll (HP Legacy Reflections provided by county), benefits (BenefitBridge®). Systems utilized by the District include Financial system provided by the County and includes the HP Legacy system and Financial 2000 systems and budgeting system not owned by the district (Questica®).

The district supports Active Directory for account management and network access and authentication

Current Application Software Supported

Systems Name	Source	Areas Directly Supported	Functional Description
Colleague®	Ellucian	Admissions, Registration, Academic Records, Student Accounts, Financial Aid	Student Information System hosted on-site. Does functions such as student registration, student education planning and supports the Mobile Application
PeopleAdmin version 7	PeopleAdmin	Human Resources	Cloud-based solution for Recruiting and Hiring
EPICS	County provided	Human Resources	
LeaveTrak		Human Resources/Payroll	Home-grown system that tracks employee leave banks that was developed a long time ago. To be replaced by the county version sometime in the near future
HP Legacy (Reflections)	County	Payroll, Finance	
BenefitBridge	Keenan	Human Resources	
Questica	Questica	Finance and Business Services	Budget Management
Financial 2000	County	Finance and Business Services	

Systems Name	Source	Areas Directly Supported	Functional Description
ImageNow	Lexmark	Admissions and Records, Business Services, Financial Aid, HR	Scanning and Imaging storage/archiving software that maintains images of important documents according to board policies
SARS GRID, TRAK, MESSAGES, ALERT	SARS	Student Services, Counseling, Fin Aid	Serves scheduling, tracking, notification and early alert functions for faculty/counselors/staff to track and communicate with students
Contract Database	Access DB	Purchasing	Contract Management
PeachTree	Sage	Bookstores, Cafeterias	Accounting Software
Safe Colleges	Keenan	HR/Safety	Training
Pure Safety	Citadel	HR/Safety	Training

Important Facts

Web Sites	http://www.sbccd.edu
Number of Full-Time Faculty	245
Number of Part-Time Faculty	622
Number of Academic Administrators and Classified Administrators/Managers	94
Number of Regular Classified FT and PT Employees	398
Number of Short-term Temporary Classified Employees	685
Major Sites	San Bernardino Community College District San Bernardino Valley College Crafton Hills College
Accreditation	Western Association of Schools and Colleges (WASC)
Fall 2014 Enrollment (Headcount)(FTES)	23,318 Headcount 14,401 FTES 2014-2015
FY 2014- 2015 Unrestricted General Fund Budget	\$ 78,237,100 million

Dates and Timeframes*

***All Dates are subject to change at the discretion of the District**

Event	Date/Timeframe
Release of RFP	June 22, 2015
Deadline for vendors' questions to the District	June 30, 2015
Deadline for the District to respond to vendor questions	July 8, 2015
Deadline for vendors' submission of proposals	July 16, 2015
Selection of vendors who will be invited to give on-site demonstrations	July 23, 2015
Onsite vendor demonstrations and presentations	August 24-27, 2015 September 8-11, 2015 September 22-25, 2015
Request for Pricing Proposals issued	Week of Sept 28, 2015
Pricing Proposals Due	Week of Oct 19, 2015
Finalization of contract terms and pricing	Nov 2015
Approval of contract award by the District's Board	Dec 2015

All questions should be submitted to Harold George of SIG, george@sigcorp.com – Email, in writing by the deadline indicated above. Written answers to questions will be distributed to all vendors on or before July 8, 2015. Vendors are strongly encouraged to schedule their resources according to the above dates and timeframes.

Important Criteria for Proposed Software

Ideally, the proposed modules should share use of an integrated database management system that would also be part of this procurement. In the event that a single vendor solution cannot meet the requirements of both the Finance and Human Resources/Payroll areas of the District, the District reserves the right to procure solutions from multiple vendors in a “best of breed” approach as long as the technologies of those solutions provide for effective and real-time integration through Web Services and robust APIs.:

1. Includes modules for Finance, Budget Monitoring, Requisitioning, Purchasing, Accounts Payable, Fixed Assets Management and Tracking, Contracts Management, Grant Year Accounting, Human Resource Management, Position Control, and Payroll Processing systems. Vendors must demonstrate that the systems are able to integrate all areas of the District Financial, Human Resources and Payroll operations and interface with all of the existing systems currently in place. Vendors must demonstrate that the systems reduce/eliminate redundant entry of data.
2. Describe how the systems are web-enabled and include web-based self-service applications and mobile applications for students, faculty, staff, and vendors, as appropriate.
3. Describe the systems support for Single Sign-on (SSO) integration. See the “Supplementary Question 8” in the following section for the level of detailed information requested.
4. The District maintains the accounting for three separate legal entities. It is therefore essential that the new system support multi-chart processing. Please describe how the system provides support for multi-chart processing to support multiple legal entities within a single instance of the software.
5. The District has purchased and implemented the Qwestica Budget Management solution and requires that the systems proposed for Finance and HR/Payroll will be tightly and effectively integrated with the Qwestica application. The integration should include two-way passing of data in a real-time manner. Please describe your experience with interfacing the system with Qwestica or describe how the system would support this type of integration.
6. Demonstrate the ability of the systems to provide for multiple levels of data security, including field-level security, and demonstrate how the system ensures the integrity of the data being entered.
7. Describe how the systems provide for the automation of business processes through the use of a workflow engine, workflow modeling, and workflow definition tool that will allow the District to automate many multi-step processes (at a minimum please include accounts payable, procurement, employee self-service and time and attendance).
8. Describe how the systems provide a paperless solution for implementing the business processes described under item 7.
9. Describe notification email template features, proxy capabilities, and reminder notices for the business processes described under item 7.
10. Describe how workflows change as the district changes and the training and support required to modify the business processes described under item 7.
11. Describe the various levels of reporting capabilities and demonstrate that they are able to easily access data for daily transaction reporting as well as complex multi-level reporting in support of executive decision making and institutional research type of objectives.

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12. Describe your solutions support of technologies that will allow for tighter, effective, real-time integration of data between the enterprise Finance and HR/Payroll solution and necessary third-party and in-house developed applications. See the "Supplementary Question 11" in the following section for the level of detailed information requested.
 13. Of particular interest is the vendor's commitment to the standards and requirements of California Community Districts reporting for STRS, PERS, and MIS requirements. Please describe how, as a vendor, you will provide support for these state-mandated requirements. See the "Supplementary Question 3" in the following section for the level of detailed information requested.
 14. Provide information regarding future development of your proposed and future products for the next 3 to 5 years and beyond.
 15. Describe how clients contact your support staff and how client inquiries are managed until resolution. What online support capabilities does your organization offer in support?

Supplementary Questions

The following questions are important with respect to the evaluation of proposals. Vendors should provide clear and detailed responses to each item.

1. Please indicate whether the proposed software includes the following applications/modules:
 - Integrated Portal
 - Finance (including General Ledger, Budgeting, Requisitioning/Purchasing, Accounts Payable, Fixed Assets)
 - Contracts Management
 - Grant Accounting
 - Human Resources
 - Payroll including Position Control

2. Please provide detailed information about reference sites. We are specifically interested in your most recent implementations. Please include the following:
 - a. Names of institutions
 - b. Contact names, titles, telephone numbers, and email addresses
 - c. List of installed software products and the production status of each, when they were implemented, and which release.

Please organize the information about reference sites with respect to the following categories:

- California Community College District(s)
 - California state and private universities
 - Community college districts with multiple colleges
 - State and private universities and colleges
3. For each of the following items, please provide specific information about how the proposed software supports the District's required reporting functions.
 - MIS (including staff file data)
 - PERS
 - STRS
 - 1099 & W2's reporting
 - ACA, OSHA, FMLA (Leave of Absences) & AB1522
 - Federal and State Tax Payroll reporting or integration with tax filing Services
 - Other state and federal reports

 4. Is the proposed software web-enabled? If so, please describe. What browsers and versions do you support?

 5. Please describe how your solution meets Section 508 accessibility requirements.

 6. Please describe how your solution meets California law related to Social Security numbers (SB 25).

 7. Please describe all available report writers, query tools, and other ancillary software.

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8. Please describe any relevant portal technologies that the system provides or can be integrated to support access through single sign-on.
 9. Please describe any online training materials that the District should consider.
 10. 11. Please describe the support and training provided on a regular basis after implementation.
 11. Please describe data migration and integration APIs or Web Services available within your solution.
 12. The District anticipates that a number of ancillary systems will need to be integrated with the new Finance and HR/Payroll solutions. The following provides a listing of those solutions that are likely to remain and require integration with the selected vendor's solution. Please answer the following questions for each of these applications listed.
 - i. Does the vendor have a formal business relationship or partnership with the ancillary software vendor listed below?
 - ii. Does the vendor provide a standard interface for this ancillary software product?
 - iii. Is the software integration for this ancillary product provided by the ancillary product vendor?
 - iv. If the vendor does not provide a standard interface, has the vendor work with other customers to build a custom interface for this software integration? If yes, please provide two or three client references.
 - v. Does the vendor know of customers who have done their own integration with this product and would they be willing to share their solution? Please provide the names of two or three clients who would be willing to share the solution.
 - vi. Does the vendor provide for an integrated solution which you are proposing that would replace the functionality of the ancillary software product?

List of Ancillary software products likely to require integration with Finance or HR/Payroll solution:

- Ellucian, Colleague® Student Information System
- PeopleAdmin for Employee Applicant tracking, evaluation, and onboarding
- Questica Budget Management System
- Pure Safety Training

General Technical Information

Please answer the following technical questions with respect to the proposed system:

1. Please indicate if the system is offered as any of the following:
 - Cloud-Based Software as a Service (SaaS)
 - Hosted Application Services (ASP)
 - On-premises Solution

If offered as a Cloud-Based SaaS or Hosted Application Services (ASP), please respond to the following questions:

1. Describe the SaaS or ASP environment and services available to support the systems being proposed.
2. Describe the process for supporting the installation for software updates.
3. Describe the technology used to support data integration between the hosted applications and other applications that remain on-premises.
4. Does your application run on a variety of client workstations, e.g., PCs, Macs?
5. Does your solution support a **completely** browser-based work environment? If not, is such an environment planned? If planned, when is it scheduled to be released?

If offered as an On-premises Solution, please respond to the following questions:

6. Describe in detail the options available regarding Database Management Systems Software that the vendor's solution is available to run on. Please indicate the number of clients currently running on each DBMS platform.
7. What hardware platforms (e.g., application servers, mass storage devices) can be used to support the proposed system? How should such platforms be sized? What operating system(s) can be used to support the proposed system?
8. Present a physical topology and logical topology (both in graphical form) that describe an appropriate hardware and software environment.
9. Describe the recommended specifications for client platforms, including operating systems, amount of memory, processor speed, etc.
10. What programming languages are inherent within the proposed system? What compilers, if any, need to be acquired by the District?
11. What kind of middleware, if any, is recommended or required?
12. Does your application run on a variety of client workstations, e.g., PCs, MACs?
13. Does your solution support a **completely** browser-based work environment? If not, is such an environment planned? If planned, when is it scheduled to be released?
14. Please describe a typical technical and support staff structure to maintain and support your solution for a campus of our size (e.g., database administrators, system administration, programmers, help desk, etc.)

Appendix A: Required Format for RFP Responses

Section 1: Executive Summary

Provide an executive summary that summarizes the proposal.

Section 2: Vendor Profile

Provide the following information:

- (a) Name of vendor
- (b) Vendor's mailing address, telephone number, FAX number, and web site address
- (c) Vendor's primary contact person
- (d) Primary contact person's title, mailing address, telephone number(s), FAX number, and email address
- (e) Brief overview of the vendor's company, products, and services

Section 3: Vendor's Understanding of the RFP

- (a) Provide a statement that acknowledges the vendor's understanding of the "Procurement Process," as presented in the RFP.
- (b) Provide a statement that acknowledges the vendor's understanding of the "RFP Instructions and Requirements," as presented in the RFP.

Section 4: Important Criteria for Proposed Software

Provide responses to each of the items within the "Important Criteria for Proposed Software" section of the RFP.

Section 5: Proposed Software Products

- (a) Identify all application software that is proposed or required.
- (b) Identify all database technologies and/or file management systems that are proposed or required.
- (c) Identify all required ancillary software (e.g., middleware, compilers, and report writers) that the District should consider.
- (d) Identify all optional ancillary software (e.g., middleware, compilers, and report writers) that the District should consider.
- (e) Summarize the features, functionality, and characteristics associated with each software product.

Section 6: Supplementary Questions

Provide a response to each of the items within the "Supplementary Questions" section of the RFP.

Section 7: State/Federal Reporting Requirements

For each major application (e.g., Student, Financial Aid, Human Resources/Payroll, Finance) summarize the functionality that enables support for state and federal reporting. In particular, such a summary should address the following questions:

- (a) Is the vendor's current software already compliant? If not, how will compliance be achieved?
- (b) What product commitments, if any, is the vendor making with respect to reporting functions? How will such commitments unfold?
- (c) How does the vendor ensure ongoing compliance with the release of software upgrades?

Section 8: General Technical Information

Provide a response to each of the items within the "General Technical Information" section of the RFP.

Section 9: Proposed Training and Implementation Services

- (a) Describe the training and implementation support that is required, recommended, available, or provided for each proposed software product, including the database management system.
- (b) Provide a suggested 18-month implementation schedule, including major milestones.
- (c) For each major system implementation activity, estimate the number of hours of vendor-provided professional services that are needed.

Section 10: Additional Services

- (a) Describe all additional services (e.g., remote technical support) that are required, recommended, and available or provided for each proposed product.
- (b) Provide information about the internal staffing requirements that the District will encounter with the proposed system.
- (c) Provide information about national, regional, and state specific Users Groups that are supported by your company. Include contact information for Officers of those Users Groups.

Section 11: Data Conversion and System Interfaces

- (a) Describe the products, utilities, processes, and services that are recommended or needed for the conversion of the District's existing data.
- (b) Identify a means of developing and maintaining interfaces between the District's existing enterprise systems and the District's future enterprise systems during the implementation process.
- (c) Identify a means of developing and maintaining interfaces between the proposed AIS applications and the District's existing ancillary systems (e.g., Student Information System, Financial Aid System, document imaging, and library), some of which are web-enabled.

Section 12: Software Maintenance and Enhancements

- (a) Describe the benefits, impacts, and schedules of new releases and modules. State the circumstances under which such releases are mandatory or optional.
- (b) Describe the procedures, both during and after the warranty period, for obtaining product support.
- (c) Describe, in detail, how gaps between the vendor's baseline product and the District's functional needs will be identified, analyzed, and resolved. Given the District's requirement to preserve existing functionality (but not necessarily present business processes), it is important for vendors to present a strategy that enables the District to maintain the capabilities that are inherent within its existing enterprise solutions.
- (d) Explain how custom modifications can be made by the vendor and/or District. In addition, describe the alternative mechanisms for maintaining such modifications over time.

Section 13: Vendor's Corporate Strength

Describe the vendor's corporate history, market segment(s), client base, employee base, research and development programs, and financial well-being.

Section 14: Optional Products and Services

Describe, in detail, all optional products and services. Vendors are hereby advised that the District may want to procure an optional item, but might not be able to do so if it is not formally declared in this section. Optional products might include query tools, workflow systems, IVR solutions, utilities, documentation, training materials, data warehouses, database technologies, security mechanisms, etc.

Section 15: Additional Information

Provide any additional information that the District should consider in its evaluation of proposals. This would include a list of whether your company is currently involved in litigation with any of your clients. Do not provide marketing brochures or generic information that does not meet your specific solution to this Request for Proposal.

Section 16: Acknowledgement of Addenda

Provide attached proposal form that acknowledges understanding and compliance with RFP conditions and acknowledges the issuance and receipt of any RFP addenda, if applicable.

Section 17: Client References

Provide three client references for agencies/companies that are currently or in the past five years have used your services. Community Colleges are preferred. A correlation between the proposed systems and the referenced system is preferred.

For each client include:

Owner/Company/Agency Name:

Contact Person No. 1 and current telephone number: IT Executive

Contact Person No. 2 and current telephone number: Business Services Executive

Contact Person No. 3 and current telephone number: HR Executive

Section 17: Contact Information Page

Company Name:

Mailing Address:

City, State, and Zip Code:

Telephone Number:

FAX Number:

Name of Signatory):

Title of Signatory:

Individual

Name: _____

Title: _____

Partnership

Name: _____

Name of Signatory: _____

Title: _____

Corporation

Name: _____

(a _____ Corporation)

President: _____

Secretary: _____

[Seal]

**Request for Proposal
San Bernardino Community College District
RFP No. 2016-01**

Enterprise Finance, HR and Payroll Software, and Related Services

Affidavit of Non-Collusion

STATE OF CALIFORNIA

The undersigned declares:

I am the _____ of _____, the party
(Title) (CONTRACTOR Name)
making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder 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 bidder.

I declare under the 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 _____ day of _____, 20__ at _____.
(SBCCD, State)

Signed: _____

Request for Proposal
San Bernardino Community College District
RFP Number 2016-01
Enterprise Finance, HR and Payroll Software, and Related Services

Contractor Profile Form & Designation of Names

CONTRACTOR Name: _____

DUE NO LATER THAN 3:00pm Thursday July 16, 2015

In response to SBCCD's Notice Inviting Proposals for Enterprise Finance, HR and Payroll Software, and related services, the undersigned submits this firm offer to:

SBCCD RFP 2016-01
Enterprise Finance, HR and Payroll Software, and Related Services
Attn: Jason Oberhelman, Purchasing Agent
114 S. Del Rosa Dr.
San Bernardino, CA 92408

Section 1: Designation of Names

Person Responsible for Bid: _____

Street Address: _____

SBCCD, State & Zip: _____

Telephone: _____ Fax: _____

Email: _____

Business Type: _____ TIN: _____
(Corporation, Sole Proprietorship, etc.) (EIN or SSN)

Section 2: Bid

CONTRACTOR must enter a fixed price for each Unit Price item in the space(s) provided on the next page of the Bid Form. Bidder's unit prices shall include all labor, materials, tools, equipment, overhead, profit, and all other direct and indirect costs and expenses to produce and deliver as required. Prices must be net including discounts.

I, _____, the undersigned, the _____ of
(Type/Print Name) (Title)
_____, hereby declare that I am duly authorized to execute this Bid
(Name of Company)

Form; that I have carefully examined the requirements of this Bid; acknowledge receipt and incorporation of the following Addenda, _____; that this Bid Form constitutes a firm offer to SBCCD that if awarded, all prices shall remain effective as required on this Bid Form; and that, under penalty of perjury under the laws of the State of California, to the best of my knowledge and belief, the information contained in this Bid Form is true and correct.

Signature: _____

Date: __

**Request for Proposal
San Bernardino Community College District
RFP Number 2016-01**

LOCAL VENDOR DESIGNATION FORM

SBCDD AP 6330 Section 3: The Purchasing Department will accept recommendations from the requesting department for potential vendors, but will endeavor, where possible, to encourage the use of local and small business enterprises in its procurement activities. On all procurement activities that must be competitively bid, or for which the District must receive quotes, such will be evaluated with a ten (10%) percent preference for local vendors. The vendor must claim local vendor preference to be considered. Please note the following exceptions:

- Those contracts which State Law or, other law or regulation precludes this local preference.
- Purchases made through cooperative purchasing and leveraged procurement agreements and piggy-back purchases.
- Public Works construction projects.

A "local" vendor will be approved as such when, 1) it conducts business in a physical location within the County of San Bernardino; and 2) it holds a valid business license issued by an agency within the County of San Bernardino; and 3) business has been conducted in such a manner for not less than six months prior to being able to receive the preference. Proof of eligibility will be provided to the District as part of the vendor application process.

Subject to the Local Vendor Preference, final vendor designation will be made by the Purchasing Department.

Is your company requesting to be designated as a local vendor? Yes____ No____

If yes, does your company conduct business in a physical location within the County of San Bernardino?
Yes____ No____

If yes, does your company hold a valid business license issued by an agency within the County of San Bernardino? Yes____ No____

If yes, please include a copy of your current business license as an attachment to this application.

If yes, has your company been conducting business in San Bernardino County for at least six months?
Yes ____ No____