



**#2023-05  
REQUEST FOR PROPOSAL  
TRANSPORTATION SCHEDULING SOFTWARE  
FOR  
ROCK COUNTY, WISCONSIN**

Proposals due in Rock County Purchasing Division by: **March 30, 2023 – 2:00 p.m.**

Proposals received after this date and time will be rejected.

Proposals must remain in effect for the life of the contract.

Address Proposal to: Sherry Oja  
Finance Director  
Rock County Courthouse  
51 S. Main Street  
Janesville WI. 53545

Rock County reserves the right to accept or reject any or all proposals, to waive any technicality or error in any proposal or part therein, and to accept the same or combinations, in whole or in part, whichever is deemed to be in the best interest of Rock County.

The County further reserves the right, without prior notice, to supplement, amend or otherwise modify this RFP or otherwise request additional information from any and or all respondents. By submitting a proposal, the consultant thereby agrees that the County's decision concerning any submittal in any respect is final, binding and conclusive upon it for all purposes, and acknowledges that the County in its sole and unqualified discretion may waive or deviate from the procedures and/or timetable outlined.

Contracts are awarded to the highest ranked, most qualified, responsible and responsive proposer on the basis of the Request for Proposal and full consideration of any or all alternatives, as may be in the best interest of Rock County. In determining the award of contract, Rock County will consider the scope of the work involved, timeliness of delivery, competency of proposer, proposer's ability to render satisfactory service, and past performance. If two or more proposers submit identical proposals, Rock County will make award to proposer of its choice and such decision will be final.

## RESPONSE SUBMISSION

Selection of the vendor shall be the responsibility of Rock County. The County reserves the right to select one or more respondents that appear best qualified to provide the services desired and then invite those respondents to appear at a designated time and place for oral presentations and/or interviews. The recommendation award shall be based upon the submission that represents the most advantageous overall response for Rock County, all factors considered. In this regard, Rock County reserves the right to accept other than the lowest cost proposal and to reject any or all submittals under this RFP, if deemed in the best interest of the County.

## INSTRUCTIONS FOR PROPOSAL

The proposer is required to submit electronically via DemandStar ([www.demandstar.com](http://www.demandstar.com)) or submit five (5) hardcopies of their proposal in a sealed envelope marked RFP #2023-05 to Sherry Oja, Finance Director, 51 South Main Street, Janesville, WI 53545. All proposals must be received by **2:00 p.m. (local time) March 30, 2023**. Any proposal submitted after this date and time will be rejected. No faxed or emailed proposals will be accepted.

Proposers are responsible for ensuring that the above office receives their proposal before the deadline. Proposal "packets" must be clearly labeled with vendor name, return address, proposal title, date and the name of the proposer's primary contact for proposal questions.

Proposals shall be signed with name typed below signature. Where proposer is a corporation, proposal must be signed with the legal name of the Corporation followed by the legal signature of an officer authorized to bind the Corporation to contract.

Proposers must be licensed to do business in the State of Wisconsin when required by law.

## INQUIRIES

All questions concerning this Request for Proposal must be submitted **in writing** to Sherry Oja, Finance Director. Questions must be received by **12:00 noon (local time), March 9, 2023**. Questions received after this date and time will not be answered. Questions must be e-mailed to [sherry.oja@co.rock.wi.us](mailto:sherry.oja@co.rock.wi.us) and must include ITP #2023-05 in the subject line.

No verbal explanation or instructions will be given in regard to the meaning of the specifications during the proposal period. Proposers shall bring inadequacies, omissions or conflicts to Rock County's attention in writing by the question cut-off date and time. If necessary, answers to questions will be provided to all specification holders in the form of an addendum. Addenda will include a list of each question received and Rock County's response.

## ADDENDA

All changes in or interpretations of the specifications prior to proposal due date will be made by written addenda issued by Rock County to each recipient of the specifications on record. All addenda will be issued no later than 72 hours prior to proposal due date. All addenda or notice of addenda will be posted on Rock County's website, [www.co.rock.wi.us](http://www.co.rock.wi.us) and on DemandStar ([www.demandstar.com](http://www.demandstar.com))

## **PROJECTED TIMETABLE**

Issue Request for Proposal	February 16, 2023
Questions Due	March 9, 2023 – 12:00 noon
Addenda Issued	March 16, 2023 – 5:00 p.m.
Proposals Due	March 30, 2023 – 2:00 p.m.
Evaluation of Proposals and Demos	March 31, 2023 – April 14, 2023
County Board Approval	April 27, 2023

After all proposals have been reviewed, a recommendation shall be made to the appropriate County governing committee. Approval by the Rock County Board of Supervisors may be required prior to the award of the contract. Respondents not involved in the final selection process shall be notified in writing. The above schedule is for informational purposes only and is in no way binding upon Rock County.

## **VENDOR SUPPLIED DOCUMENTATION AND MATERIALS**

All vendor-supplied materials, including the vendor's proposal, become the property of Rock County. We will work with vendors to meet their confidentiality requirements, provided they are within reason. All vendor confidential material must have each page clearly marked as confidential. Wisconsin "Open Records Laws" apply. Rock County's determination to treat matters as public or confidential under the Wisconsin Open Records Law shall be final.

## **PROPOSAL AND PRESENTATION COSTS**

Rock County will not be liable in any way for any costs incurred by the offerors in the presentation of their proposal in response to this Request for Proposal nor for the presentation of their proposal and/or participation in any discussions or negotiations.

## **COMPLIANCE WITH REQUEST FOR PROPOSAL**

Proposals submitted shall be in strict compliance with the Request for Proposal. Failure to comply with all provisions on the RFP may result in disqualification. The County reserves the right to reject any and all submittals or to waive minor defects or irregularities in the submittal. The County further reserves the right, without prior notice, to supplement, amend or otherwise modify this RFP or otherwise request additional information from any and or all respondents. By submitting a proposal, the proposer thereby agrees that the County's decision concerning any submittal in any respect is final, binding and conclusive up it for all purposes, and acknowledges that the County in its sole and unqualified discretion may waive or deviate from the procedures and/or timetable outlined.

## **IMPLIED REQUIREMENTS**

Products and services that are not specifically addressed in this Request for Proposal, but which are necessary to provide functional capabilities proposed by the offeror, must be included in the proposal.

## NON-DISCRIMINATION

In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s.51.01 (5)(a), sexual orientation, national origin, or military service as defined in §111.355(1), Wis. Stats. This provision shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor further agrees to take affirmative action to ensure equal employment opportunities. The contractor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the non-discrimination clause (Wisconsin Statutes S.16.765 (2)).

## INDEMNIFICATION

The contractor to perform services for Rock County shall indemnify, hold harmless, and defend Rock County, its officers, agents, and employees from any and all liability including claims, demands, losses, costs, damages and expenses of any kind and description or damage to person or property arising out of or in connection with or occurring during the course of any agreement between the contractor and Rock County where such liability is founded upon or grows out of the acts, omissions, negligence or misconduct of any agents or employees of the contractor.

## INSURANCE REQUIREMENTS

The Contractor further agrees that in order to protect itself and the County, it will at all times during the term of this agreement keep in force and effect worker's compensation, comprehensive general, and auto liability insurance policies by a company or companies authorized to do business in Wisconsin with minimum limits:

Personal and bodily injury	Per person	\$1,000,000
	Per accident	\$2,000,000
Property damage:	Each Occurrence	\$500,000
	Aggregate	\$500,000

Coverage shall apply as primary with County named as an additional named insured. Contractor shall also provide a copy of the additional insured endorsement. Contractor shall furnish satisfactory proof of insurance to County prior to the date of Contract Execution or commencing work for the County.

## MODIFICATION AND WITHDRAWAL

Proposals may not be modified after submittal. Proposers may withdraw proposals at any time before the proposal due date, but may not resubmit them. No proposal may be withdrawn or modified after opening except where the award of the contract has been delayed for more than 60 days from due date.

## **PROOF OF COMPETENCY OF PROPOSER**

Any proposer may be required to furnish evidence satisfactory to Rock County that the proposer and proposed subcontractors have sufficient means, expertise, financial ability, and experience in the types of work proposed to assure completion of the Contract in a satisfactory manner.

## **CONFLICT OF INTEREST**

All respondents must disclose with their proposal, the name of any officer, director or agent who is also an officer or employee of Rock County. Further, all respondents must disclose the name of any Rock County officer or employee who owns, directly or indirectly, any interest in the vendor's firm or any of its branches. Failure to disclose this information will result in disqualification of proposal and/or cancellation of Contract. Rock County reserves the right to seek damages for recoupment of losses in having to re-let or reassign.

## **DISQUALIFICATION**

Rock County reserves the right to disqualify proposals, before and after opening upon evidence of collusion with the intent to defraud or other illegal practices upon the part of the proposer.

## **AWARD**

Award will not be made to any proposer in default of a Contract with Rock County, or to any proposer having as its agent or employee, any individual previously in default or guilty of misrepresentation.

## **AGREEMENT DEVELOPMENT**

Rock County reserves the right to negotiate with one or more proposers.

# **CONTRACT REQUIREMENTS**

## **CONTRACT**

The documents that will form the contract include the "Request for Proposal", any attachments or addendum and the successful respondent's "Proposal".

## **APPLICABLE LAW**

All contracts are governed under the laws of the State of Wisconsin and are made at Rock County, Wisconsin, and venue for any legal action to enforce the terms of the agreement will be in Rock County Circuit Court.

## **TERMINATION FOR DEFAULT**

The contract may be terminated by Rock County, in whole or in part, in writing, whenever the County determines that the Contractor has failed to meet performance requirements of the Contract.

## **TERMINATION FOR CONVENIENCE**

Rock County reserves the right to terminate the Contract, in whole or in part, by giving the Contractor written notice of at least thirty (30) days prior to the effective date of the termination. Upon receipt of termination from Rock County, the Contractor shall only provide those services specifically approved or directed by Rock County. All other rights and duties of the parties under the Contract shall continue during such notice period.

## **CANCELLATION**

Failure to maintain the required certificates of insurance, permits, licenses and bonds will be cause for contract termination. If the Contractor fails to maintain and keep in force the required insurance, Rock County shall have the right to cancel and terminate the contract without notice.

Rock County reserves the right to cancel a purchasing contract in whole or in part without penalty due to the non-appropriation of funds or for failure of the contractor to comply with terms, conditions, and specifications of the contract. Any dispute arising as to quality and quantity is subject to arbitration as provided in Chapter 788, Wisconsin Statutes.

## **FORCE MAJEURE**

Neither party to this agreement shall be liable to the other for any cost or damages if the failure to perform the Contract arises out of causes beyond the control and without the fault or negligence of the parties. Such causes may include, but are not restricted to, acts of God, fires, quarantine restriction, strikes and freight embargoes. In all cases, the failure to perform must be totally beyond the control and without fault or negligence of the party.

## **PERMITS, LICENSES AND FEES**

The selected vendor shall be responsible for obtaining all permits, licenses, certifications etc. required by Federal, State, County and Municipal laws, regulations, codes and ordinance for the performance of the work required in these specifications and to conform with the requirements of said legislation.

## **PATENT FEES, ROYALTIES AND LICENSES**

If the selected vendor requires or desires to use any design, trademark, device, material or process covered by letters of patents or copyright, the selected vendor and its surety shall indemnify and hold harmless the County from any and all claims for infringement by reason of the use of such. The successful vendor further agrees to indemnify Rock County from any costs, expenses, royalties, or damage which the County may be obligated to pay by reason of any infringement at any time during the prosecution of or after completion of the contract.

## **PUBLIC ENTITIES CRIMES**

A person or affiliate that has been convicted of a public entity crime is not allowed to submit a proposal for this contract.

## **PUBLIC RELATIONS IMAGE**

Selected vendor's personnel shall at all times handle complaints and any public contact with due regard to the County's relationship with the public. Any personnel in the employ of the selected vendor involved in the execution of work that is deemed to be conducting themselves in an unacceptable manner shall be removed from the contract at the request of Rock County.

## **PUBLICITY RELEASES**

Contractor agrees not to refer to award of this contract in commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by Rock County. The contractor shall not have the right to include the County's name in its published list of customers without prior approval of Rock County. The contractor further agrees not to publish or cite in any form, any comments or quotes from County staff.

## **ASSIGNMENT & SUBCONTRACTING**

The selected Contractor will not be permitted to sublet, sell, transfer, assign or otherwise dispose of the contract or any portion therein, or its right, title or interest in, to any person, firm or corporation without the written consent of Rock County.

## **VENDOR'S RELATIONSHIP TO ROCK COUNTY**

It is expressly agreed and understood that the successful vendor is in all respects an Independent Contractor as to the work, and the vendor is in no respect an agent, servant or employee of Rock County. The contract will specify the work to be done by the vendor, but the method utilized to accomplish the work shall be the responsibility of the vendor.

## **DEFICIENCIES**

In the event that Rock County determines that there are deficiencies in the service work provided by the vendor under the contract, Rock County shall notify the vendor in writing as to the precise nature of any such deficiencies. Within ten (10) working days of receipt of such notice, vendor shall take responsible steps to correct any deficiencies.

## **WORK CHANGES**

Rock County reserves the right to order work changes in the nature of additions, deletions or modifications without invalidating the Contract.

## **RECORDS**

The Contractor shall maintain accurate and complete records. All books and records pertaining to the performance of the contract shall be made available at any time during the contract and for three years following the expiration of said contract to the Rock County Finance Department, Purchasing Department or any independent auditing firm acting at the direction of Rock County.



# **BACKGROUND**

## **A. INTRODUCTION**

Rock County Transportation is looking for a software application that will be able to support dispatch and scheduling for Rock County.

The separate requirements that we would like included within the software would be:

- Payment and Billing Management
- Data Management
- Dispatching
- Equipment and Eligibility
- GIS and Performance
- Reservations and Scheduling
- Routing and Dispatch
- Reporting
- Training
- General Expectations

## **B. OVERVIEW OF ROCK COUNTY**

### **Summary**

Rock County, population 163,687 in 2020, is a political subdivision of the State of Wisconsin. Rock County is comprised of six Cities, three Villages, 20 Towns, and multiple unincorporated hamlets. The County's Cities include Janesville, Beloit, Edgerton, Milton, Evansville, and Brodhead. The City of Janesville serves as the County seat, is in the County's central portion, and is the largest municipality in the County with a population estimated at over 65,942 in 2021. The County's Villages include Clinton, Orfordville, and Footville.

### **County Facilities**

The main buildings that comprise Rock County's governmental unit include a Courthouse, 911 Communications Center, Dr. Daniel Hale Williams-Rock County Resource Center, Health Care Center, Public Works, Rock Haven Nursing Home, Sheriff's Office & Correctional Facility, UW Extension, the Regional Airport, and the Eclipse Center (located in Beloit). All buildings except for the Eclipse Center are in the Janesville area, which is the County Seat.

# **SPECIFICATIONS AND SCOPE OF WORK**

## **A. EXPECTATIONS FOR TRANSPORTATION APPLICATION**

### **1. Scope of Work**

Rock County Transit is looking for a software application that will be able to support routing, dispatch and scheduling for Rock County that will consider location of pick-ups, drop-offs, number of drivers available, number of vehicles, and types of pickups. The current capacity supports 13 drivers with eight (8) full time five (5) part-time with 12 buses in the fleet with 11 available and two (2) out of service due to maintenance or repairs. Current capacity is believed to be 83 trips per day; however, we are open to this being identified as being increased but our currently rule of thumb is arrival 15 minutes before scheduled appointment time.

The separate requirements that we would like included within the software would be:

- Payment and Billing Management
- Data Management
- Dispatching
- Equipment and Eligibility
- GIS and Performance
- Reservations and Scheduling
- Reporting
- Training
- General Expectations

### **2. Payment and Billing Management**

- Ability to accept payment at time of ride (including cashless)
- Ability to proactively add payments for rides
- Ability for other family members to add payments to accounts
- Ability to support contract management
- Ability to post rates and what trip expenses will be
- Ability to identify when an account is low on funds
- Ability to accept and bill debit cards and/or credit cards

### **3. Data Management**

- Ability to add, maintain codes used in the system
  - Rejection Codes
  - Ride Categories
  - Cancellation Reasons
  - Driver specific codes
- Ability to customize contact lists
- Ability to customize trip sources
- Ability to customize rates
- Ability to establish Roles and Permissions
  - Administrator(s)
  - Dispatcher
  - Rider
  - Biller
  - Inquiry
  - Driver
- Ability for someone to have more than one role/permission

#### **4. Dispatching**

- Ability to dispatch and assign drivers and vehicles directly once routes are identified
- Ability to manually assign driver/vehicles
- Ability to provide notification to a dispatching change
- Ability to communicate to riders pick up and drop off times
- Ability to provide trip approval/denials
- Ability to access all dispatch information
- Ability to see assigned and unassigned drivers/routes
- Ability to accept same day reservations, changes, etc.
- Ability to accept cancellations and reschedules
- Ability of auto removal of trips

#### **5. Equipment and Eligibility**

- Ability to assign classifications to vehicles and drivers
- Ability to identify when classification rules are in jeopardy
- Ability to set up maintenance information, and schedule maintenance
- Ability to identify if equipment is out of service for repairs

#### **6. GIS and Performance**

- Ability to support GIS navigation and locate all necessary locations
- Ability to identify trip times and routes, including route optimization
- Ability to be timely in response
- Ability to be available 24/7
- Ability to GeoTrack where all drivers/vehicles are located at any given time
- Ability to use online mapping
- Ability to monitor road performance for possible violations 'rules of the road'

#### **7. Reservations and Scheduling**

- Ability to easily identify client addresses, from new or existing option
- Ability to calculate the time based on pick up for arrivals and destinations
- Ability to estimate time and distance charges in advance for client and driver
- Ability to identify eligibility type and validation for client
- Ability to support return trip information (time, distance, etc.)
- Ability to identify when additional reservations and/or seats are not available
- Ability to schedule recurring trips
- Ability to add private notes on client records that are only accessible by drivers/staff
- Ability to track cancellations
- Ability to see the different types of relationships that exist
- Ability to allow automated scheduling
- Ability to adjust or manually override identified routes
- Provides real-time scheduling

## **8. Reporting**

- Ability to track all trip types: scheduled, cancelled, rescheduled, missing, payor sources,
- Ability to print and report private notes
- Ability to identify and print all schedules, virtually or paper
- Ability to identify adjustments or manual overrides used on routes
- Ability to log all hours for both drivers and vehicles
- Ability to identify when vehicles need maintenance
- Ability to filter reports
- Ability to identify specific fields to be included or excluded in a report
- Ability to schedule reports to be run/generated
- Ability to select the print format option: PDF, Excel, CSV format
- Ability to identify validations and violations
- Ability to generate reports by routes, drivers by selected time periods and include individual or multiple types of transportation, ie. payor sources paratransit vs general services
- Ability to mail merge for address labels and letter generation

## **9. Training**

- Provide training for all roles and permissions
- Provide training on how to use all features of the application
- Identify what training options are available to new hires
- Identify and provide applicable cross training, including scheduling, reservations and dispatch
- Provide training on system maintenance
- Provide training on management of client information and intake
- Provide training on call taking, reservation taking and trip screening
- Provide training on scheduling, and rescheduling
- Provide training on dispatching
- Provide training on creating and running reports

## **10. General Expectations**

- Easy, intuitive navigation
- Ability to download data
- Ability to upload data
- Electronic document support of all forms
- Web based application with mobile access

## **11. Required Reports**

### **Summary Reports**

- Ability to identify total number of riders
  - Reporting by coalition partnership options
- Ability to provide specific reports
  - Trip Reports
  - Billing Reports
  - Maintenance Reports
  - Trips Billed, Missed, Rescheduled, No shows
  - Operating Statistics
  - Driver Manifests
  - Trips by funding sources
  - Vehicle Productivity by Run
  - Monthly Ridership Reports including Total, by Service, and by Funding Source
  - Monthly Billing Report
  - Cancellations, No Shows, Late Cancellation Reports
  - Idle Time Report
  - On-Time Performance Report
  - ADA Eligibility Expiration Notification
  - Alphabetical Client Listing

## **B. ROCK COUNTY INFORMATION TECHNOLOGY (RCIT)**

### **1. Existing Hardware and Networks**

All computer software and hardware are purchased by RCIT. The County utilizes many different hardware and software platforms including:

- Microsoft Windows Servers
- Linux Servers
- HP/UX Servers
- Citrix Servers
- Virtual Servers
- Storage Area Network
- Wireless Access Points
- Cloud based services
- Security Appliances
- Oracle Databases
- Microsoft SQL Server Databases
- Laserfiche document management
- Microsoft SharePoint
- Intranet and Internet Web Services

The County has a Wide Area Network which includes all county buildings and several partner locations. The LANs are Ethernet 802.3 networks using industry standard fiber optic and copper cabling, delivering 1GB connections at most end-point locations and 100Mbps at all others.

Preference would be for vendor hosted Software as a Service (SaaS) solution. Details on vendor hosting or on-premises options would be helpful in the evaluation of the proposals.

## **2. Selection and Implementation Process**

Rock County Information Technology (RCIT) shall coordinate the County activities during all phases of this project including vendor selection, contract negotiation, procurement, design, implementation, and post-implementation support. The responses received from vendors will be used by RCIT to prepare for the planned implementation of software by identifying vendors that can scale their systems in terms of capacity and functionality.

Rock County will not guarantee any subsequent purchases of any minimum number of systems or components. The purchase of all software components is contingent on the availability of funds for purchase.

## **C. PROPOSAL REQUIREMENTS**

### **1. Hardware and Operating System**

Industry accepted hardware and software platforms are required.

### **2. Federal and State Reporting Requirements**

Proposed software must meet all Federal and State reporting requirements for electronic record and retention policies as previously defined by statute.

### **3. Vendor Profile – Appendix B**

Proposal shall include a complete vendor profile presenting topics relevant to the selection process. Appendix B is furnished as a template, but a narrative is acceptable if it includes, but not be limited to the following:

#### **a. Company Information**

- Location of the corporate office.
- Number and location of support offices nationwide and worldwide (if applicable).
- Support locations that are particularly relevant to the proposed system software.
- Total number of years the application software has been in general release.
- Total number of employees.
- Total number of employees dedicated to supporting the recommended products.
- Approximate number of personnel that would be assigned to the proposed Rock County system

#### **b. Client List**

- A minimum of six installation references.
- At least one other installation reference shall represent an installation with similar volume and similar processing requirements to Rock County.
- At least one installation reference located near Rock County (if possible).

#### **c. References**

- At least three government agency references with a preference for at least one county agency and at least one Wisconsin installation.

### **4. Functionality Matrix – Appendix C**

Proposers shall indicate compliance with each requirement in the Functionality Matrix with the methodology contained in the instructions for Appendix C. Failure to provide an answer to each question in the matrix may result in disqualification of proposal.

## **5. Pricing Information – Appendix D**

Proposal shall contain an itemized outline for all costs associated with the installation and maintenance of the Proposer's Minutes and Agenda Management system. Appendix D may be used as a template or a narrative may be attached, but must include at least all the items listed in Appendix D.

Proposals shall include a complete and full inventory of expenses for software and all support services. Vendors shall indicate whether volume-purchasing discounts are available. Expenses must be presented in an un-bundled fashion by itemizing each expense as a separate line item, such as:

- Software costs, including licensing and hosting options
- Installation related fees and services
- Training related fees and services
- Maintenance and support costs
- Package modification costs and upgrades required to meet the prescribed business function
- Any other changes that would be billed to Rock County.

## **6. Vendor Proposal Certification – Appendix E**

Proposal must be certified accurate for 120 days from the Proposal Due Date. **Appendix E shall be signed and submitted with Proposal response.**

## **7. Management Summary - Narrative**

Proposal shall include a brief synopsis covering system functionality, implementation, methodology, vendor support, and system growth potential for both capacity and functionality. **Management summary shall not exceed three (3) pages.**

## **8. System Training - Narrative**

Proposal shall include training to be provided at a location determined by Rock County located in Janesville, Wisconsin, during normal office hours. The goal of training will be to make County staff self-reliant in all aspects of system management and operation. The cost of training courses must be included in the Required Training Costs, Appendix D.

Proposal shall include a complete inventory list of the courses and educational materials relevant to this project. Scheduling information for 2022 shall be included. Proposal shall recommend an educational plan for each category of system users. Plan shall include users, operations department, software development/support staff, hardware technology staff, as well as non-technical functional users. Include any third-party vendor courses, which might be beneficial.

## **9. Documentation - Narrative**

Proposal shall include a complete and thorough listing of the documentation available to the customer. Identify and describe any documentation that will be developed for Rock County Information Technology (RCIT) by the vendor. Each item of customer documentation must indicate whether the vendor will release that documentation for review during the Proposal evaluation period. Vendors willing to accommodate this request shall include copies of customer documentation with their Proposals and any other instructions they might have. Vendors must indicate whether their in-house documentation will be made available for an on-site inspection.

## **10. Implementation Plan – Narrative**

Proposal shall include a complete schedule showing major tasks, time frames, vendor staffing, customer staffing, expenses, and the suggested project management methodology. Specific attention shall be given to acceptance testing methodology, conversions requirements and the phase-in of specialized system tailoring, if any.

Implementation plan should include information related to:

- Consultant's approach to the handling of job classifications and the setup of compensation pays systems, and time scheduling systems
- Methodology and process that will be used to validate entry of data submitted within applications
- Description of training that will be provided to County staff to ensure understanding of applicable systems as well as maintenance of said applicable systems
- An estimated timeframe of the project from beginning date to completion date, including significant milestones adhering to the County's specified timeline

## **11. Maintenance and Support - Narrative**

Proposals shall include a discussion of software maintenance services and ongoing technical support. Present all available service options including critical support, standard service, and routine maintenance procedures. For each service option identify the following:

- An explanation of each of the services performed
- Guaranteed response times

## **12. Contractual Issues – Narrative**

Proposal shall include a complete standard purchase contract and a complete maintenance contract for software including all standard wording and vendor typical clauses, guarantees and remedies. All other relevant contractual documents shall be included (i.e., warranty terms and conditions, software licensing, end of lease arrangements).

Proposal shall include a description of how vendor will handle contract clauses. Include the following system requirements:

- Response time
- Total number of system users
- Number of active system users

Notwithstanding the above, RCIT is not obligated to use the vendor's standard contract and RCIT reserves the right to further negotiate the terms of said agreement with successful vendor. All contracts shall be reviewed by Rock County's Purchasing Division, Finance Director and Corporation Counsel. The proposal received from the successful vendor along with this RFP document and any addenda will be attached to and become part of the final contract.

## **13. Subcontractors and Third-Party Assignments**

Proposals shall include full disclosure of subcontractors and third-party assignment used for preparation of the proposal, support for existing software and hardware, implementation, training and any other supplies or services.



## **D. PROPOSAL EVALUATION AND AWARD**

Award shall be made to the proposer whose proposal is determined to be in the best interest of Rock County, taking into consideration cost and the other evaluation factors listed in the RFP.

Vendors responding to this RFP must specifically respond affirmatively or negatively to each specific requirement of the County in the same sequence as the RFP. Vendors must include an explanation of each response. Additional materials submitted with the responses may be used by the County in furthering its understanding of a vendor's response to a specified or requested requirement.

A Proposal Evaluation Committee has been established and will independently review each proposal received. After written proposals have been reviewed, some vendors may be invited to make oral presentations and provide product demonstrations. An unsatisfactory demonstration may be grounds for rejection of a proposal.

Each response will be evaluated on the vendor's ability to satisfy the requirement as presented in this RFP. Consequently, each vendor shall attempt to present the information in response to this RFP that will instill confidence in the vendor's ability to fulfill the requirements at the lowest possible cost. However, Rock County is not obligated to select the least cost vendor. The evaluation criteria will include any or all the following:

### **1. Software /Vendor**

- Overall design match to requirements
- Commitment to Government
- Flexibility
- Ease of change
- Reliability of software firm
- Ease of use
- Number of present users
- Warranty provisions/future support
- Data security
- Customer support
- Customer satisfaction
- Integration with hardware/operating software
- Financial stability
- Ability to demonstrate installed base of similar systems

### **2. Implementation Support**

- User training
- On-site assistance
- On-going training
- Documentation and manuals
- Scope
- Quality
- Track record meeting schedules and cost estimates
- Assistance from other users

### **3. Cost**

- Installation
- Purchase price and/or lease price for software (and hardware if applicable)
- Package modifications and upgrades
- Training and implementation assistance
- Annual maintenance, software (and hardware if applicable)
- Annual Information Technology personnel cost

### **4. Growth**

- Expansion without conversion
- Package features proposed beyond RFP
- Additional packages and features available

### **5. Quality of Response**

- Readability and completeness of response

## **APPENDIX A** **PROPOSER CHECKLIST**

This checklist has been provided to assist the proposer in complying with RFP requirements. All items listed must be included with the proposal. To assist in proposal evaluation, proposer shall cross-reference the required item with the applicable page in the proposal.

Proposer shall check off each item as it is assembled into the proposal, enter the page number where the item can be found in the proposal, detach the checklist from the RFP and submit it as part of the Proposal.

<b><u>Item No.</u></b>	<b><u>Format</u></b>	<b><u>Proposal Page</u></b>
_____ Proposer Checklist (this form)	Appendix A	_____
_____ Vendor Profile	Appendix B	_____
_____ Desired Functionality Matrix	Appendix C	_____
_____ Pricing	Appendix D	_____
_____ Vendor Proposal Certification	Appendix E	_____
_____ Management Summary	Narrative	_____
_____ System Training	Narrative	_____
_____ Documentation	Narrative	_____
_____ Implementation Plan	Narrative	_____
_____ Maintenance and Support	Narrative	_____
_____ Contractual Issues	Narrative	_____
_____ Subcontractors and Third Party Assignments	Narrative	_____

**APPENDIX B**  
**VENDOR PROFILE**

Include the following information in your proposal response marked as Appendix B:

**A. Company Information**

1. Company Name
2. Website
3. Corporate Address
4. Local Address
5. Telephone Number
6. Contact Person Name and Title
7. Contact Person Location
8. Contact Person Telephone Number
9. Contact Person E-Mail Address
10. Number of years your company has provided automated agenda workflow solution software like that offered in this RFP.
11. Location of office from which service will be provided to the County.
12. Number of years the office that will provide services to the County been open.
13. Number of Staff
  - Nationwide
  - Office serving Rock County
  - Total number of technical staff in office serving Rock County
  - Total number of clients currently supported by the office serving Rock County
14. Project Manager Information
  - Name
  - Office location
  - Number of similar projects completed
  - Experience of the project manager and project team in handling projects similar in scope to this one.

**B. Client List - PLEASE SUBMIT A COMPLETE LIST OF AT LEAST SIX (6) CLIENTS.**

Please provide the following information for projects like the scope of services described in this RFP. Rock County reserves the right to contact any of the Proposer's clients as deemed necessary during the evaluation process.

- Agency Name
- Agency Address
- Agency Staff Size
- Contact Name
- Contact Telephone Number
- Contact E-Mail Address

### **C. References**

Please provide the following information for a minimum of three (3) agencies in municipal, county, state, or federal governments for which Proposer has provided a comparable software solution during the past five (5) years.

- Agency Name
- Department Name
- Agency Address
- Contact Name
- Contact Title
- Contact Telephone Number
- Contact E-Mail Address
- Approximate County (Agency) Population
- General Description of Scope of Work for Transportation Scheduling and associated applications
- Time Frame for Provision of Services from Date of Contract Award to Completion
- Completion Date for Services Provided

References may or may not be reviewed or contacted at the discretion of Rock County. Rock County reserves the right to contact references other than, and/or in addition to, those provided by proposers. Rock County shall not provide information received from references to proposers.

**APPENDIX C**  
**FUNCTIONALITY MATRIX**

Specific functionality requirements will be outlined and requested as part of the scheduled demonstrations.	
Specific questions will be asked during the demonstrations.	
If available, provide best practice workflows, training documents as examples of process efficiencies, and training documentation.	
<b>Optional/Alternative Features:</b>	

## **APPENDIX D**

### **PRICING**

The proposal pricing page must itemize the cost to the County for all services to perform the scope of services outlined in the RFP. A narrative shall be attached to clarify any pricing data submitted (e.g., hourly rates).

1. Software Licensing Costs - Identify licensing terms and conditions (e.g., site license, concurrent users, per seat license, unlimited subscription licensing)
2. Training Costs (including travel if onsite) - Identify training components
3. Configuration and Implementation - Identify configuration and implementation components
4. Total Initial Project Costs
5. Yearly Maintenance or Subscription Costs



**#2023-05**  
**REQUEST FOR PROPOSAL**  
**TRANSPORTATION SCHEDULING SOFTWARE**  
**FOR**  
**ROCK COUNTY, WISCONSIN**

**APPENDIX E**  
**VENDOR PROPOSAL CERTIFICATION**

**The following certification must be submitted with Proposal.**

I hereby certify that all prices included in this Proposal are accurate and binding for one hundred twenty (120) days from the Proposal due date.

I further certify that the total costs accurately reflect the total Proposal cost, and that the company which I represent will deliver and install, and coordinate delivery and installation of the proposed applications software, hardware, and systems; train staff and provide documentation for the total amount of \$\_\_\_\_\_ (see attached pages for detail).

The contractor to perform services for Rock County shall indemnify, hold harmless, and defend Rock County, its officers, agents, and employees from any and all liability including claims, demands, losses, costs, damages and expenses of any kind and description or damage to person or property arising out of or in connection with or occurring during the course of any agreement between the contractor and Rock County where such liability is founded upon or grows out of the acts or omissions of any agents or employees of the contractor.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
E-Mail