



Revision to ASR and/or Attachments

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CLERK OF THE BOARD
COUNTY OF ORANGE
BOARD OF SUPERVISORS

Date: 01/18/2024
To: Clerk of the Board of Supervisors
CC: County Executive Office
From: Auditor-Controller *Frank Kim*
Re: ASR Control #: 23-001163, Meeting Date 1/23/2024, Item No. # 12
Subject: Approve Release of Request for Proposal for Enterprise Resource Planning System

Digitally signed by Frank Kim
DN: cn=Frank Kim, o=County of Orange, ou=CEO, email=frank.kim@ocgov.com, c=US
Date: 2024.01.18 12:30:40 -08'00'

Explanation:

Revised Recommended Action(s)

Make modifications to the:

Subject Background Information Summary Financial Impact

Revised Attachments (attach revised attachment(s) and redlined copy(s))

Attachment A – Request for Proposal 003-2365101-LB as follows:

Page 12: Revise percentage of evaluation criteria (Paragraph begins on page 11):

A.12.4: Finalist Demonstrations and Interviews: If elevated as a finalist, each Proposer must be prepared to attend a Proposer Demonstration and Interview with the RFP Evaluation Panel within seven (7) calendar days of notification from the County. The County will provide detailed agenda and scripts prior to Demonstrations and Interviews. Demonstrations and Interviews will be held using a combination of on-site and remote presentations and can cover all functional areas listed in this RFP,

January 18, 2024

including software or implementation services. Proposers must be prepared to discuss all aspects of their Proposal in detail, including technical questions. Proposers will not be allowed to alter or amend their Proposals using the presentation process. The Demonstration and Interview will be scored separately. For Proposers who are selected as finalists, the written criteria will comprise ~~80~~⁵⁰% of the final score, and the Finalist Demonstration and Interview will comprise ~~20~~⁵⁰% of the final score.

Page 13: Revise percentage of the "Proposed ERP System Requirements"

Proposed ERP System Requirements ~~45~~⁵⁰%

- Proposal's ability to meet the requirements of Attachment 4, ERP Requirements
- Proposal's overall ability to meet the County's ERP System requirements
- System's ability to be configured
- System's ease of use and intuitive user interface
- Proposer's ability to meet County security standards

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- A.12.5 Model Contract:** Finalists will be required to provide a redline version of the County's Model Contract (Attachment 15), including any additional or supplemental agreements that the County will be expected to execute in connection with the Contract, including without limitation any additional licenses, financing agreements, limitations of liability or warranty, opinion of counsel letters, or any other first- or third-party agreement or terms upon which the Proposal is contingent. Further changes to the Model Contract will not be considered after the deadline provided.

A.13 Minimum Qualifications

Each Proposer must meet the following Minimum Qualifications:

- A.13.1** Proposer's data centers that store County Data must be located within the continental United States.

- A.13.2** The Proposer shall attest that its organization and all of its officers:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department or agency.
2. Have not within a five (5) year period preceding this RFP been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.

A.14 Evaluation Criteria

The County reserves the right, based upon its deliberations and in its opinion, to accept or reject any or all responses, or terminate the competitive solicitation process at any time and secure the solicited products and services by any other lawful means. The County also reserves the right to waive minor irregularities or variations to the specifications and in the competitive solicitation process.

Evaluation criteria have been defined for each phase of the evaluation. The County's Evaluation Committee will score Proposals and decide which firms to elevate to the next phase of the evaluation process. In addition to the criteria below, the County of Orange adjusts scores based on the OCLSB and DVBE preference policy. See section A.21 for more information.

The Software Demonstrations and Interviews will be scored separately. For Proposers who are elevated as finalists, the Written Proposal Criteria will comprise 50% of the final score, and the Software Demonstrations and Interviews will comprise 50% of the final score.

Evaluation criteria will include:

Written Proposal Criteria:

Responsiveness and Quality of Proposal: 5%

- Proposal demonstrates an understanding of the County's requirements as set forth in this RFP
- Proposal demonstrates a thorough understanding of Government Finance, Procurement, Human Resources, Payroll and Budgeting processes
- Proposal demonstrates knowledge of the environment in which the activities will take place
- Proposal does not substantially deviate from any material requirements of the RFP
- Proposal's detail, clarity, presentation, and overall content
- Proposal's completeness of response
- Proposal's conformance with instructions, conditions, and format of the RFP
- Proposal does not include substantive reservations or omissions

Proposed ERP System Requirements: 45%

- Proposal's ability to meet the requirements of Attachment 4, ERP Requirements
- Proposal's overall ability to meet the County's ERP System requirements
- System's ability to be configured
- System's ease of use and intuitive user interface
- Proposer's ability to meet County security standards

Proposed ERP System Implementation Services: 15%

- Proposer's resources available to deliver the products/services identified in the Proposal on time, on budget and within scope
- Proposer's implementation methodology (style, approach, risk mitigation, oversight, monitoring, and organizational change management) and implementation plan and schedule (including Proposer's and County's roles and responsibilities)
- Proposer's data migration plan and quality assurance plan
- Proposer's production/operations cutover strategy
- Proposer's project management tools and methodology, including earned value management

Proposed ERP System Platform(s) and Cloud Hosted Environment: 5%

- Proposed system's infrastructure, platform, facilities (data centers), and security architecture
- Proposed system's certifications maintained for example any ISO or NIST certifications. Also include any platform/system regulation compliance such as HIPAA, HITECH or FedRAMP

Proposed ERP System Support Program: 15%

- Proposer's ability to meet County's operational and processing requirements
- Proposer's customer support and maintenance services
- Proposer's service level requirements, including hours of support for business hours, after hours weekends, and holidays
- The experience level of Proposer's support and service staff
- Proposer's production support model for servers, databases, integrations, real-time updating, batch processing; including error handling and communications to customer staff
- Proposer's Service Level Agreement (Attachment 9)

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