

REQUEST FOR INFORMATION (RFI)

Polk County, Iowa

for

**JD Edwards Purchasing Module
Assessment**

RFI#:006-01415

RFI Published: Monday, August 4, 2014

Responses Due: Monday, August 18, 2014

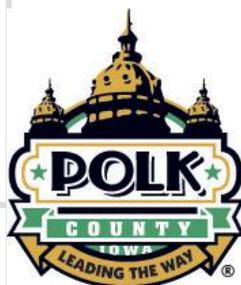


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1 Proposal Submission and Formatting

1.1 Introduction and Purpose

Polk County, Iowa (the "County") through its Department of General Services, is seeking information from prospective vendors relating to implementation of a simplified, automated purchasing module within JD Edwards through the publication of this Request-for-Information (RFI).

The information collected from this RFI will help the County to gain a better understanding of the market in order to publish a more complete Request-for-Proposal (RFP). The RFI objectives are twofold:

1. Provide vendors with basic information on the project scope, as well as gaining a clearer understanding of possible solutions.
2. Provide the County with an understanding of vendor capabilities and standard service offerings.

RFI responses should focus specifically on details related to past experiences with local government and techniques or models used to apply innovative and/or creative solutions for an automated purchasing module within JD Edwards.

The County understands that vendors may provide only specific services or products for a system such as this. Please complete the questions that apply to your area of expertise or business.

1.2 Tentative Project Timeline and Events

The County has established the following tentative timeline for the administration of this project. *NOTE: Dates are subject to change at the County's discretion.*

RFI Published: Monday, August 4, 2014

RFI Responses Due: Monday, August 18, 2014 (2:00 p.m. Central Standard Time)

1.3 Rules of Engagement

To maintain a level field, the following rules of engagement will be strictly followed:

- Due to the tight timeline, *the County will not be answering questions or having meetings regarding this RFI*, nor will the County be collecting or sharing questions and responses from this RFI.
- Please answer questions to the best of your abilities based on the information provided. Incomplete information may impact the County's understanding of your capabilities.
- Not responding to this RFI does not preclude any vendor from the forthcoming formal competition (RFP) process, although we encourage your input to this RFI phase.

Some of the content within the RFI may be repeated in the RFP; however, vendors will have the right to modify information they provide in the RFI in their response to the RFP.

This RFI is issued solely for information and planning purposes only and does not constitute a solicitation. All information received in response to the RFI that is marked "proprietary" will be handled accordingly. Responses to the RFI are not "offers" and will not be accepted by the County to form a binding contract. Responders are solely responsible for all expenses associated with responding to the RFI.

1.4 RFI Response Format - General

To facilitate the review, responses to the RFI must be in the order of the requested information below and be organized as indicated by the question numbers.

- Please arrange your response by following the format and order as listed in **Section 2 (Product and Services Scope)**.
- You **shall** respond by stating the question and then your answer in the same numbered format to match the RFI.
- If a question is not applicable to the products and/or services your business provides include the question and respond "not applicable."
- You must also include all tables as requested in the RFI in your response. If more rows are needed in tables, you may add additional rows.

Hard copy information should be submitted on standard 8 1/2" x 11" paper, and should be presented in a professional manner, such as spiral bound or professional grade folder and/or three ring binders. Information should be labeled appropriately on the front cover to include the RFI name, RFI number, vendor name and due date. Tabs or other separators should serve to divide major sections of the information. Manuals and other reference documentation may be bound separately and included in the RFI package or envelope. The vendor shall number any divided sections and provide a list of sections by the numbers provided.

Electronic responses shall be submitted via email in Microsoft Word or Adobe PDF format. Responses should not exceed thirty (30) pages.

All responses, as well as any reference material presented, must be written in the English language. Main text must be a common typeface (Arial, Times New Roman, etc.) and must not be smaller than 10 point font size.

The County will be issuing a full and formal RFP for this project, so please be brief but thorough in your RFI response, to assist in facilitating review of all responses.

1.5 RFI Response Format - Specific

1.5.1 Vendor Background and Information

This section should give a brief overview of the vendor and provide the following information:

- Vendor name and business address (Include any local offices, regional offices and/or headquarters, foreign or domestic.)
- Year established (Include former names and year established, if applicable.)
- Type of ownership and parent company, if applicable.

➡ Contact person (Include title, telephone number, fax number and email address.)

1.5.2 Solution Description

This section should describe your solution for a simplified, automated purchasing process specifically using JD Edwards. Please evaluate and provide recommendations on how our existing workflow can be improved using your module. Also, identify if there are limitations that can't be improved within our current workflow along with an explanation of why it can't be enhanced. Within this section, please also specify if there are any assumptions you are making about Polk County's expertise, equipment and/or resources.

For additional information, please refer to section **2.1: Scope of Request** to review the scope and current issues that the various Offices/Departments are currently experiencing within the purchasing process.

1.5.3 References and Experience

Please submit a minimum of two (2) and maximum of three (3) references from the last five (5) years that can attest to your ability to provide the skills and services proposed in this RFI.

At least one (1) reference SHALL be for a government client, preferably a county, of similar size and scope to this RFI. The responses should emphasize the services and experiences, which most closely match those requested by the County. Please refer to Section 2.1 Scope of System for size of the County.

1.5.4 Additional Information

Along with the RFI responses, the vendor may include promotional literature or product brochures. Please send only material(s) that relates to purchasing. Use your best judgment in the amount and type of promotional material being sent.

In addition to the items listed in this section, the remainder of the information should be logically organized, and should follow the general organization of the RFI document itself.

1.6 Submission of RFI Responses

Vendors may submit their responses via mail OR email. Email is preferred (Microsoft Word or Adobe PDF).

➡ **Responses are due Monday, August 18 by 2:00 p.m. Central Standard Time.**

Responses should be submitted to:

Mayuresh Mahatme – IT Programming Manager
Polk County, IA – IT Department
111 Court Avenue, Suite 373
Des Moines, IA 50309
mayuresh.mahatme@polkcountyiowa.gov
Phone: (515) 286-3084

If responding by email, the subject heading of the email shall read: RFI RESPONSE: Polk County JD Edwards Purchasing Module Assessment. Responses shall not exceed thirty (30) pages. Responses to this request shall be delivered at the **same date and time listed above**. A confirming email of receipt will be provided once the document is checked for readability.

All responses received by the County, unless properly designated as "confidential" by the vendor and meets the requirements of state law, will be available to the public, in accordance with the provisions of Iowa's public records law(s). A vendor may submit any information that it believes is confidential separately in a file marked "confidential", or designate the confidential status appropriately in the digital files submitted, or the County will treat the information as public. Any information that is marked as "confidential" must have an explanation as to why it is marked that way. A vendor cannot designate information "confidential" after the County receives and opens the responses. Also, please note that a vendor cannot designate the entire document as "confidential".

The County reserves the right to request additional information. The County also reserves the right to retain all responses submitted, and to use any ideas contained in a response. Submission of a response to this Request for Information indicates acceptance by the vendor of the conditions contained in the RFI.

1.7 Revisions to RFI

The County may modify or amend this RFI at any time. If it becomes necessary for the County to revise any part of this RFI, the revisions will be posted on the General Services page of the County's website www.polkcountyiowa.gov.

In such an event and depending on the magnitude of the revision, the submission deadline may be extended, at the option of the County, to allow vendors the opportunity to revise their proposals accordingly.

1.8 Vendor Expenses

By submitting a response to this RFI or participating in the process, each vendor agrees that all of its related expenses are its sole responsibility, and that the County will not be responsible for any costs whatsoever incurred by the vendor in connection with or resulting from the RFI process.

1.9 No Obligation to Proceed

The County is under no obligation to proceed with this project or any subsequent project, and may cancel this RFI at any time without the substitution of another, if such cancellation is deemed in the best interest of the County. Furthermore, the County may reject any and all proposals, to waive any irregularities or informalities in a proposal, and to issue a new or modified RFI, if it is found to be in the best interest of the County.

2 Product and Services Scope

2.1 Scope of Request

The County Information Technology (IT) Department, working in conjunction with various County Offices and/or Departments, is in the process of replacing its existing purchasing workflow within JD Edwards with an improved automated solution that simplifies the current process. JD Edwards has been in production since 2000 and is currently being used for payroll, cash management, central accounting, inventory, open enrollment and purchasing. The various County Offices/Departments have collaborated and identified the current issues that they are encountering throughout the existing purchasing workflow. The current issues have been documented and can be reviewed in the following file named:

[Appendix A / General Issues for Polk County Purchasing Process](#)

For additional information regarding the current workflow within JD Edwards please refer to the process maps which can be reviewed in the following file named:

[Appendix B / Current State Process Maps for Polk County Purchasing Process](#)

2.2 Potential Scope of Services

A formal RFP could request any or all of the product and services:

- An automated purchasing process specifically within JD Edwards encompassing the scope of functions outlined in Section 2 (Product and Services Scope).
- Implementation services including:
 - ✓ Process Design and Change Management
 - ✓ Best Practice Identification
 - ✓ Project Management from Vendor for Implementation
 - ✓ System Configuration
 - ✓ Coordination of Reports
 - ✓ Interface Development
 - ✓ Maintenance and Support

2.3 System/Solution Information Requested

For the following questions, please provide detail in the table below or a similar table in your response.

2.3.1 Vendor Profile

Description	Responses
Vendor Name	
Contact Name	
Contact Title	
Contact Phone	
Contact Fax	
Contact Email	
Contact Address, City, State & ZIP	
Vendor Website	
Services or products provided	
Number of years in business	
Years of experience implementing automated purchasing solutions specifically within JD Edwards	
Number of project implementations completed and/or successfully implemented for purchasing solutions specifically within JD Edwards	

2.3.2 Locations / Local Presence

Please list any offices in Iowa. If applicable, please give location and local contact information.

Description	Response
Location / Address	
Contact Name	
Contact Title	
Contact Phone	

Please list any automated purchasing solutions specifically dealing with JD Edwards that were implemented in Iowa. Add more lines/rows if needed.

Iowa Location (Client Name)	Product and/or Services Implemented

2.3.3 Product and/or Services – General

Please provide a general overview and description of the product and services offered. Include detail regarding technology platforms and languages in your description.

General Overview of your Product & Services Solution

Describe situations where your product was integrated with other systems. Which types do we need to integrate with?

Location (County, if applicable)	Name of System Integrated with	Product Name	Type of Integration

2.3.4 References

Reference should include projects of similar size and scope to the County and that may also typify the qualifications of the vendor.

Provide a brief description of the work performed on each project including the approximate size and cost of the project. Emphasis should be placed on the expertise of the vendor regarding automated purchasing solutions specifically within JD Edwards, services and implementations. A minimum of two (2) client references shall be included.

Reference 1	Response
Contact Name	
Contact Title	
Contact Phone	
Contact Fax	
Contact Email	
Contact Address, City, State & ZIP	
Contact Website	
Project Description: Please include demographic data such as number size of the County	
Description of services and/or products provided	
Describe any implementation challenges or issues	
Lessons learned from any implementations issues	
Total Project Cost	
Project Start Date	
Project End Date	
Annual equipment, license, maintenance & support costs	
Do you provide ongoing support for this client? What type?	

Reference 2	Response
Contact Name	
Contact Title	
Contact Phone	
Contact Fax	
Contact Email	
Contact Address, City, State & ZIP	
Contact Website	
Project Description: Please include demographic data such as number size of the County	

Description of services and/or products provided	
Describe any implementation challenges or issues	
Lessons learned from any implementation issues	
Total Project Cost	
Project Start Date	
Project End Date	
Annual equipment, license, maintenance & support costs	
Do you provide ongoing support for this client? What type?	

Have your project implementations generated any savings (ROI) and/or revenue for the customers by whom your automated purchasing solutions, products, and/or services were implemented?

Location Product Implemented	Implementation Cost	Estimated Cost Savings or Revenue Generate	Type of Cost Savings (labor, efficiency, etc)	Estimated Time for ROI

Describe any cost-saving strategies and/or revenue enhancement strategies your company may have that may or may not have been implemented by your clients not already listed above in which you believe might be of benefit to this Polk County initiative.

Cost-saving / Revenue Enhancement Strategy	Estimated Cost Savings or Revenue Generate	TYPE of Cost Savings (labor, efficiency, etc)	Estimated Time for ROI

Please describe the features and functions you feel makes your solution unique and sets you apart from your competitors.

Competitive Advantages