

**LOS ALAMOS COUNTY
PROCUREMENT DIVISION**

101 Camino Entrada, Building 3, Los Alamos, New Mexico 87544

(505) 709-5503

Advertised: March 7, 2024

Closing Date: March 28, 2024

Request for Information ("RFI")

RFI Number: 24-63

RFI Name: Utility Billing and Work Order Software

GENERAL INFORMATION

1. This solicitation is a Request for Information ("RFI"). The County may utilize the responses received from this RFI to develop specifications and/or scope of services for a future procurement. As part of this RFI, the County also wishes to gauge interest in a future procurement. **No award will be made as a result of this RFI.**

2. The following terms may be used interchangeably throughout:

- a. "Respondent," "You/Your"
- b. "System," "Software," "Solution"

3. **ELECTRONIC SUBMISSION:** Emails should be addressed to: lacbid@lacnm.us. Subject line **must** contain the following information: **RESPONSE – RFI24-63 Utility Billing and Work Order Software.**

It is strongly recommended that a second, follow up email (without the submission included or attached) be sent to Jaime Kephart, Senior Buyer, at jaim.kephart@lacnm.us to confirm the submission was received.

The body of the email must contain enough information for the identity of the Responder to be clear, including company name, name of person sending the email, and contact information including email address and phone number.

Only emails with submissions received in the lacbid@lacnm.us email box prior to **2:00 p.m. Mountain Time, March 28, 2024** will be reviewed.

Submissions submitted by email will be opened only after the closing date and time stated in the solicitation document.

4. The Incorporated County of Los Alamos ("County") invites submissions from all qualified Responders. No submission may be withdrawn after the scheduled closing time. Submissions will not be accepted after the scheduled closing time. **Please make note of the submittal requirements outlined in this solicitation.** Read and follow the instructions carefully. **Include the required documents provided in this RFI as part of your submittal packet.** Any misinterpretation or failure to comply with the submittal requirements could result in rejection of the submission. Submission preparation is at the Responder's expense.
5. Any change(s) to the solicitation will be conveyed through the written addenda process. Read carefully and follow all instructions provided on any addendum, as well as the instructions provided in the original solicitation.
6. Any questions must be received in writing at least five (5) days prior to the date fixed for when submissions are due.
7. County reserves the right, at its sole discretion, to accept or reject any responses; to waive any and all irregularities in any or all statements or responses; to request additional information from any or all respondents.

8. Solicitations are Public Records. Pursuant to the New Mexico Inspection of Public Records Act, NMSA 1978, Chapter 14, Article 2, all materials submitted under this RFI shall be presumed and considered public records. Except to the extent any information may be protected by state or federal law, submissions shall be considered public documents and available for review and copying by the public.

CONTACT INFORMATION

To request documents, submit written questions, or request procurement process or project specific information, contact the following and include all contacts listed on all correspondence sent via e-mail.

1. Jaime Kephart, Contract Manager, at jaime.kephart@lacnm.us or (505)709-5503
2. Karen Kendall, Deputy Utility Manager for Finance and Administration and Project Manager for this solicitation, karen.kendall@lacnm.us.
3. As an additional courtesy to interested parties, this RFI and related documents may also be downloaded from the County's website at the following address: <https://lacnm.com/bids>

NEED STATEMENT

The Incorporated County of Los Alamos ("County") Department of Public Utilities ("DPU") is seeking information from qualified service providers who provide fully hosted utility billing and work order software solutions. Desired services may include, but are not limited to, utility billing for electric, gas, water and sewer services; work order system for DPU field crew related to outages, meter change outs, meter testing, temporary service disconnections, meter reading validation, leak determination, etc. System should include utility bill generation and cashiering functions.

The County would like more information to develop a Scope of Work prior to proceeding with a possible future procurement.

BACKGROUND

1. **General County Background Information.** The County is situated at the foot of the Jemez Mountains on the Pajarito Plateau with an elevation ranging from 6,200 feet to 9,200 feet. Two distinct communities, Los Alamos Town site and White Rock, each with its own visitor center, are home to ~18,000 people. Los Alamos is mostly known for the historic accomplishments of its largest employer, Los Alamos National Laboratory, and continues to gain notice for its vast scenic assets and recreational opportunities. Visit the Los Alamos County website (www.losalamosnm.us) and the tourism website (www.visit.losalamos.com) for more information.
2. **About the DPU and Current Billing and Work Order Processes.**
 - a. DPU is a department within the County providing citizens with electric, gas, water and sewer services. The County processes approximately 9,000 utility bills (an approximate average of 8,100 printed bills and 900 electronic bills) monthly on a four (4) cycle billing schedule for electric, gas, water, sewer and refuse services. All services are included on one (1) monthly billing statement. The County currently utilizes the Tyler Munis Enterprise Resource Planning ("ERP") system for its utility billing, uses the Master's Touch for utility bill printing and mailing, and uses Paymentus for credit card or electronic bill payments received from customers in person or via the web. Customers can also mail or drop off payments to Enterprise Bank.
 - b. Work orders are used to communicate with DPU's Electric Distribution, Gas/Water/Sewer field crews, and Meter Readers about meters, outages, disconnections, reconnections, meter change outs, new and old customer (move in/move out) locations and re-reads for billing or customer questions.

SCOPE OF RESPONSE

1. Abilities and Functionality.

- a. Provide a product overview of the solutions and tools your company offers to meet the County's Needs Statement above, address in detail your ability to provide the following solutions, tools, and services and describe specifically *how* your solution provides the following needs:
 - i. A robust, fully-hosted, billing system that accommodates multiple rate classes and includes advanced rate structures, including but not limited to the following:
 1. Electric time-of-use,
 2. Electric residential demand,
 3. Electric net metering for solar customers,
 4. Street and area lighting,
 5. Water tiered (seasonal and time of day) rates,
 6. Effluent,
 7. Sewer – winter average calculation for non-residential and flat rates for residential,
 8. Gas – monthly variable rates, and
 9. Budget Billing capability.
 - ii. Utility bill generation and cashiering functions.
 - iii. Reporting capabilities with both standard out-of-the box reports and ad hoc reports.
 - iv. Tools for accounts receivables and collections.
 - v. A work order system for DPU field crew related to outages, meter change outs, meter testing, temporary service disconnections, meter reading validation, leak determination, etc. A work order system that includes, but is not limited to the following, abilities and functionality:
 1. Work order system ties to the billing system for meter maintenance, meter change outs, meter disconnects, and new customers.
 2. Work order system provides methods for full communication to field crews to correct and inquire about sewer issues; electric, gas, and water meter issues; meter irregularity and install issues; meter re-reads; leaks; valve issues; Advanced Meter Infrastructure (“AMI”) maintenance and issues; area lighting issues; and needs for tree trimming around utility assets and facilities.
- b. **Software Feature and Functionality Matrix.** Provide a product or software feature and functionality matrix or list that provides, in detail, all the abilities and functionality of each tool, module, app, etc. you offer to meet the County's needs. If you offer other optional tools and products you think may also be of interest to the County, please provide a product or software feature and functionality matrix or list for those as well.

2. Integrations. Describe if and how your solution can integrate with the County's following current systems:

- a. Integration with County's current Enterprise Resource Planning (“ERP”) system which is Tyler Munis such as daily upload files for detailed general ledger data relating to

Utility billing. County's current version of Munis is 2021.9, but may be updated to at least 2021.12 prior to completion of a possible future procurement.

- b. The County collects meter usage data via Sensus Smart Meters. The billing solution should ideally include customer portals for access to meter data, billing data, leak notifications and bill payment options. Describe specifically how your system could integrate with Sensus Analytics.
- c. The County uses a smartphone-based manual reading app ("SPMR"), which is an application for smart phones, or similar devices to record utility meter data and to communicate such data to its remote server. Describe specifically how your solution could integrate with SPMR for limited, manual meter reading?
- d. The County uses the Master's Touch for utility bill printing and mailing services. The billing system must produce a PDF version of bills per read cycle that can be exported. The County then submits the PDF files by cycle to the Master's Touch. Describe specifically how your solution could produce these files.
- e. The County uses Paymentus for credit card and electronic bill payments received from customers in person or via the web. Please describe your process for receiving/importing payment data. Currently, the file is in notepad text file. Please provide the upload/import data structure you use.
- f. Customers can either mail or drop off payment to Enterprise Bank. The bank produces a notepad text file to upload the payment data. Please describe your process for receiving/importing payment data. Please provide the upload/import data structure you use. Single Sign On ("SSO") integration with County's Azure Active Directory.
- g. Describe any other helpful integrations offered or commonly requested by customers and provided by respondents.

3. Pricing and Costs.

- a. The County desires to and may contract for up to fifteen years for software. If your firm chose to respond to a future RFP or other type of procurement describe your ability to provide pricing for and contract for a multi-term agreement up to fifteen years and describe any concerns or challenges with being able to provide pricing and contract for that length of time.
- b. In order to provide pricing and costs in response to an RFP or other type of procurement, what kind of detail and background information might you require from the County if you chose to propose to a future RFP or other type of procurement? If you have an intake or new customer questionnaire you typically provide, please attach it to your response to this RFI.
- c. Provide a typical cost for initial product implementation.
- d. Describe a typical pricing format for your services. Provide a rough order of magnitude or a range of typical annual costs based on your most basic service vs. a more all-inclusive package of products and services.

4. Implementation and Training. Describe your implementation and training process and timeline for new customers and whether your company provides the following implementation and training services:

- a. Assigned Account Manager or Client Success Manager,

- b. Initial training during implementation,
 - c. On-going training program with, live, virtual, or on-demand training,
 - d. In-app product walkthroughs, or
 - e. User conferences or meetups.
5. **Security Policies and Questions.** Provide a copy of your security policies and answer the following questions related to security.
- a. Do you maintain operations within the continental United States and where would our data be stored? Where are your datacenters located?
 - b. Do you use encryption in-transit and at-rest?
 - c. How often and where do you back up data?
 - d. Who owns the data in your system?
 - e. Which cloud provider do you use?
 - f. Do you offer a production environment separate from your development/testing/staging environment?
6. **County Technology Standards.** In response to a future RFP or other type of procurement, Offerors would be asked to affirm their ability to conform to the County's Applicable Technology Standards, which are included in this RFI as Exhibit B, and describe *how* they conform to the applicable standard. For this RFI, please briefly respond to the applicable standards. County wishes to identify any areas where potential Offerors for a future RFP or other type of procurement may have concerns about providing the information and details requested in the County's Technology Standards. Respondents are asked to also review the standards, identify any provisions that may be problematic in an proposal, and describe why they might be problematic.
7. **County Technology Questionnaire.** To the extent possible, please briefly respond to the questions found in the County's Technology Questionnaire found in Exhibit C. If Respondents are unable to respond to any question, please describe why the question may be problematic.
8. **Contract Terms and Conditions.** In response to a future RFP or other type of procurement, Offerors would be expected to enter into an agreement with the County using a sample services agreement, with the County's standard terms and conditions, which would be provided to offerors at that time. For this RFI, Respondents are asked to include a link to or attach a copy of any of their own master services agreement or terms and conditions the County might be asked to consider if your firm chose to respond to a future RFP or other type of procurement.
9. **Service Level Agreement.** Provide a copy of your Service Level Agreement and describe your support features and processes for both customers and bidders/suppliers.
10. **Software Development and Updates.** Describe your software development and update lifecycle and process.
11. **User Account Management.** Describe user account management.
- a. Include whether your company offers single sign-on authentication to allow customers to authenticate to the software using their agency identity provider.

- b. Include any limitations on the number of users allowed to access the system and discuss if the number of internal and external users affects the pricing.

12. **Software Demonstrations:** After the closing date of this RFI, County reserves the right to request virtual software demonstrations from some or all Respondents for the purpose of clarification and understanding. **Respondents are asked to affirm their ability to provide demonstrations and are asked to provide a point of contact for scheduling purposes.**

- a. Demonstrations will be conducted through MS Teams, or through another format agreed upon by both County and Respondent.
- b. After RFI closing, County may submit follow-up questions to Respondents or hold interviews and discussions for the purpose of clarification. County may ask that Respondents address County's follow-up questions or requests for clarification during their scheduled demonstrations.
- c. The amount of time allotted for demonstrations will be determined after RFI closing and will be communicated to those Respondents with whom County schedules demonstrations.

RESPONSE FORMAT

Please provide your response in a written format addressing items each of the items listed in the Scope of Responses above. Please restate the requested information from the Scope of Responses prior to providing your response.

ILLEGAL ACTS

The Los Alamos County Procurement Code, Article 9, imposes remedies and penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities, and kickbacks.

Exhibit A
Requested Respondent Information
RFI24-63 Utility Billing and Work Order Software

This document should be returned with RFI submittal.

Having read the response conditions and examined the scope of response for this RFI, this response is hereby submitted by:

_____/_____
Signature and Printed Name of Authorized Offeror **Title**

Organization's Legal Name **State of Incorporation**

Email Address

Mailing Address **City** **State** **Zip Code**

Physical Address **City** **State** **Zip Code**

Telephone No.

Federal Tax I.D. # **NM CRS # (if located in-state)**

Contract Manager Printed Name, Title and Email Address

**Exhibit B
Sample County Technology Standards
RFI24-63
Utility Billing and Work Order Software**

Below is a sample of the County’s Technology Standards. In response to a future RFP or other type of procurement, Offerors would be asked to affirm their ability to conform to the County’s Applicable Technology Standards.

For this RFI, respondents are asked to briefly respond to the applicable requirements below. County wishes to identify any areas where potential Offerors for a future RFP or other type of procurement may have concerns about providing the information and details requested in the County’s Technology Standards. Respondents are asked to review the standards below, identify any provisions that may be problematic when responding to an RFP or other type of procurement and describe why they might be problematic.

INSTRUCTIONS FOR A FUTURE RFP OR OTHER TYPE OF PROCUREMENT:

The following Los Alamos County Technology Standards are required and shall be supported by the vendor, contractor, reseller henceforth in this Exhibit called “Operator”, for any County solicitation requiring technology or integration to the County network and incorporated into any resultant agreement. Standards are listed with the expectation that the Operator will provide software updates to allow Los Alamos County to stay on supported versions of hardware, underlying software and protocols as outlined below.

Respondents must provide documentation that they meet the requirements in respect to the solution that they are responding with. **On premise respondents do not need to comply with hosted requirements. Hosted solution respondents do not need to comply with on-premise requirements. If the solution is a hybrid of both categories of solution, then both on-premise and hosted requirements apply as applicable to the response.**

For each standard requirement in Table 1 below, check “YES” to indicate compliance, “NO” to indicate non-compliance, or N/A to indicate that the requirement is not applicable. In the cell beneath each standard requirement, *briefly* describe *how* Offeror will comply or why a standard requirement is not applicable. If Offeror can comply, but not exactly in the way described in the standard, please describe the substantial equivalent offered or alternate method for conforming to the requirement.

Where other County policies or documents are referenced, Offeror’s may find these policies on the County’s website at the following web address: <https://lacnm.com/bids> .

	STANDARD REQUIREMENT	YES	NO	N/A
Server Operating system (OS) (On-Premises)	Microsoft (MS) Windows Server 2019, 64 bit or current (Standard and Datacenter). Contractor software must be maintained to run on a supported platform service level as defined by Microsoft at the latest stable patch level. Departments will be responsible for licensing costs and must request cost estimates from Information Management (IM) Division.			N/A
	N/A - hosted			

<p>Server Hardware (On-Premise)</p>	<p>Preferred: Use of County VMware server platform. Environment design must be submitted and reviewed by IM Division for acceptance. Proposals shall include required hardware and licensing of VMware, operating system, and proposed application-based requirements. Application with a proven Virtual installation template is preferred.</p> <p>Physical Server minimum hardware specifications consist of: Multi Socket/Multi Core processor Intel or AMD based server (standalone or blade server as determined by Los Alamos County IM Division with a minimum 64 GB RAM and RAID capability. Contractor software must be maintained to run on a supported platform service levels as defined by Microsoft at the latest stable patch level.</p>			N/A
	N/A - hosted			
<p>Network Infrastructure</p>	<p>See LAC Standards and Specifications for Building and Campus Distribution Systems Version 3 (Primarily used for building construction purposes).</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				
<p>Network (On-Premise)</p>	<p>Supported network protocol is TCP/IP (IPv4). Standards based NIC rated at 100/1000/10G copper or fiber is supported. If considering a 10G connection County IT network group shall be consulted to ensure equipment compatibility and availability at proposed site. Additional hardware cost, may be required of the project, based on project requirements, equipment and availability. The County uses Cisco technology as its default network equipment standard. Solutions shall be compatible with Cisco Network Technology.</p>			N/A
	N/A - hosted			
<p>Remote Network Access (On-Premise)</p>	<p>Direct remote access to the County network and server environment shall be done using the County's Cisco AnyConnect SSH VPN. Once a VPN connection is established end-point connections are supported via Microsoft RDP. Operator support accounts shall be set up in accordance with the adopted Los Alamos County IT Usage and Security Policy #1210.</p>			N/A

	N/A - hosted			
LAC Network Account Privilege (On-Premise & Hosted)	Desktop Client Software shall function for end users with standard user privileges. user cannot install software and shall not have administrative rights.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Desk Hardware (On-Premise & Hosted)	Physical unit minimum hardware requirements consist of: Intel core i5 based processor, minimum 8 GB RAM, Intel integrated graphics 1280 capable video minimum, display port, input or HDMI, 4 USB 2/3 ports. Support deployment onto Virtual Desktop Infrastructure (VDI) platform, specifically cloud-based platforms from Microsoft Azure, Amazon Web Service (AWS) or Google Cloud Platform.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Desktop OS (On-Premise & Hosted)	Microsoft Windows 10 at current Service Pack (SP).			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Internet Browser (On-Premise & Hosted)	Internal County Network: Google Chrome and Edge, at its latest version, are the installed browsers on county devices. Google Chrome is the county standard. New web Applications must be based on HTML5. Applications requiring Internet Explorer, Microsoft Silverlight, Java and Flash are not supported. Web applications requiring .NET framework shall not be considered. IM Division shall be consulted for compatibility issues prior to considering new application purchases requiring Java.			
Describe how Offeror will comply, alternate methods, or why a standard				

requirement is not applicable.				
Database Software Products (On-Premise)	<p>Supported database software is Microsoft (MS) SQL server version 2016 through current. New MS SQL Server product installations will require review, purchasing of licenses, appropriate hardware, and maintenance in support of proposed project or instance install to the County MS SQL Server Environment. MS SQL server software for new implementations shall be at within the Microsoft certified support release level or current. Server components for proposed projects require review and purchasing as part of the project initiative. Operator software must be maintained to run on a supported platform service level as defined by Microsoft.</p> <ul style="list-style-type: none"> • Passwords are not permitted to be transported in clear\plain text. • Vendor implementation shall not use the SA password for user level functions. SA passwords shall be maintained by the County DBA. • Only database instances can be installed on the County MS-SQL Environment. If a vendor software component install is necessary on the database server, a standalone installation will be required. • Vendor software must use standard Access & Connection architecture for accessing databases on the County MS-SQL Environment. • Applications based on Microsoft Access are not supported. Applications based on SQLEXPRESS version should be reviewed and the limitation understood by the customers and the vendor. <p>Hosted solutions shall be compliant with or provide a method to provide the County with database exports in the MS-SQL Server format.</p>			N/A
	N/A - hosted			
Internet: Collaboration and Web Publishing (On-Premise & Hosted)	Use of Internet apps or links shall be considered in collaboration with the Los Alamos Information Management Division Applications group for review to ensure that compatibility and Internet publishing protocols have been satisfied prior to formation of any agreement or installation.			
Describe how Offeror will comply, alternate methods, or why a standard				

requirement is not applicable.				
Intranet: Collaboration and Web Publishing (On-Premise & Hosted)	Microsoft SharePoint Online is the basis for the County's Intranet. Any products that will integrate or utilize the County's Intranet site shall require a compatibility consultation with IM Division before purchase and implementation. Operator software shall be maintained to run on supported platform service levels as defined by Microsoft and/or the Intranet site vendor. Proposed Intranet software products shall be accompanied by roadmap for compatibility with MS SharePoint Online.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Productivity Software (On-Premise & Hosted)	Los Alamos County uses Microsoft M365 Office Suite at its most recent version and service pack. Operator software using the Office suite must be maintained to run on supported platform service levels as defined by Microsoft.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Email (On-Premise & Hosted)	Microsoft M365 with hub transport for relay. If SMTP relay access from on premise vendor specific software is necessary, permission to use the County Email exchange shall be obtained prior to contracting or purchase of the software or solution. If SMTP relay access from hosted vendor specific software is necessary, preference is for SMTP relay to be hosted by vendor. The vendor specific solution must be supported and maintained to relay off County email domain and directed to hand off the email message to another mail server that can get the message closer to its intended recipient in accordance with service levels as defined by Microsoft for the M365 product.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Geographic Information Standards (GIS) (On-Premise & Hosted)	The County uses strictly ArcGIS products by Esri for GIS. Desktop software for end users includes ArcGIS Desktop and ArcGIS Pro. GIS web services are provided as REST endpoints from			

	ArcGIS Server using Internet Information Services (IIS). Our enterprise geodatabase is managed using ArcSDE with Microsoft SQL Server. Supported versions are one or two iterations behind the latest ESRI-supported release. The preferred method for applications to interact with GIS is via REST services. Web applications must be hosted in either ArcGIS Online or ArcGIS Portal.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Mobile Devices	Shall conform to Los Alamos County Mobile Policy #1240. Mobile devices requiring Intranet access must be secured through the County Mobile Device Management System.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Security & SSL (On-Premise & Hosted)	<p>Intranet devices must be capable with multi-factor authentication (MFA) using the County's current MFA systems. Any requirements for access to ports from the Internet into the County Network shall be approved via a technical review by the IM Division before product(s) purchase and implementation. Cisco Secure EndPoint Antivirus and Antispyware Enterprise software are used on all intranet computing devices; vendor solutions shall work in conjunction with stated antivirus products.</p> <p>SSL (Secure Socket Layer) encryption is required for both internal and external facing web applications.</p> <p>Enterprise-wide applications shall be capable of Active Directory integration for user authentication and utilize County's MFA.</p> <p>Devices requiring wireless access must a) be domain integrated or b) have the ability to accept captive portal agreement (a web page that the user of a public-access network is obliged to view and interact with before access is granted).</p>			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				

Records	Shall conform to Los Alamos County Records and Information Governance Policy #0310			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
E-Signature	Shall conform to Los Alamos County E-signature Policy #1220.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Hosted/Cloud Based Services	<ul style="list-style-type: none"> • Los Alamos County is interested in taking advantage of Anything as a Service (XaaS) opportunity available through Cloud Service Providers (CSP), in Government Cloud (GCC) where required. CSP data centers must be located within the United States. • Enterprise-wide applications shall be capable of Active Directory integration for user authentication and utilize County's MFA. • Data centers must be FedRAMP certified for SaaS solutions procured by departments if they also store or may store Los Alamos National Laboratory (LANL) critical infrastructure data for County operations. Departments must verify with LANL authority to confirm that this requirement is applicable to the LANL information to be stored. • Ownership of County data held in the CSP solution shall remain with the County of Los Alamos. County may have on-demand access to the data for export/download or have the data delivered by request by the CSP with a maximum 48-hour compliance window. Exports shall be in MS-SQL format. 			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				

Exhibit C
County Technology Questionnaire
RFI24-63
Utility Billing and Work Order Software

To the extent possible, please briefly respond to the questions below. If you have already responded elsewhere, you may state that in your response.

If Respondents are unable to respond to any question, please describe why the question may be problematic.

Service Level Agreement / Support Maintenance.

1. **[SaaS]** Provide proposed Service Level Agreements including Uptime (scheduled and/or unscheduled downtime) and other service metrics (user response times, percent delivered within 30 seconds), and compensations for missed performance benchmarks.
2. **[On-Premise/SaaS]** Provide Support Options and all terms of support, including support hours and methods of contacting support.
3. **[On-Premise/SaaS]** Provide the communication plan for communicating system upgrades, and all other maintenances and service interruptions.
4. **[On-Premise/SaaS]** Describe the methodology for testing and certifying upgrades and patches to ensure that they work properly. Describe the mechanism of versioning roll back in case of issues.
5. **[On-Premise/SaaS]** Describe the process of applying upgrades and patches including, if there are client/user responsibilities, and a responsibility matrix for the tasks involved.
6. **[On-Premise/SaaS]** Provide a brief history of product upgrades and interim patches/fixes released in the last 18 months.
7. **[On-Premise/SaaS]** Identify the most current stable release and patch level, certified for support, for all software and firmware, and acknowledge that all software and firmware will be installed to those levels.

B. Ownership / Recovery

1. **[SaaS]** Acknowledge the following: County retains all rights to its data and materials. Use of the Contractor's system confers no ownership rights to the Contractor and County Materials and Data may be used by the Contractor only as necessary to provide contracted services.
2. **[On-Premise/SaaS]** Discuss how the solution meets statutory requirements for data ((ex. PII, HIPAA, CJIS, Gramm-Leach-Bliley Act, FIPS 199...)).
3. **[SaaS]** Discuss access to the County's data via ODBC or alternative method, and any limitations to that access.
4. **[On-Premise/SaaS]** Describe the support provided for performing legal discovery on the system.
5. **[SaaS]** Describe the method(s) of turning over County data, and providing a reader for that data, upon termination of services.

C. Administration

1. **[On-Premise/SaaS]** Describe the use of Permission Levels, Roles or other mechanisms to manage authorities to create read, update, and delete data.
2. **[On-Premise/SaaS]** Describe the system's use of Active Directory Groups and Group Policies.
3. **[On-Premise/SaaS]** Describe authentication mechanisms available.
4. **[On-Premise/SaaS]** Describe the ability of users to maintain their own profile.
5. **[On-Premise/SaaS]** Describe any interfaces or integrations with Directory Services.

D. Security

1. **[SaaS]** Describe the classification of the proposed Cloud solution. Is the solution SaaS, PaaS, IaaS or a combination of the classification types? Is the solution hosted, owned and operated, by CSP or is the solution a partnership of several CSPs including infrastructure partners?
2. **[SaaS]** Describe the security measures in-place, and available, to protect the system and its data.
3. **[SaaS]** Submit details on hosted or cloud service provider's data center and information security compliance.

4. **[SaaS]** Identify any encryption algorithms used.
5. **[SaaS]** Describe the policies that apply to, and notification measures to be used in the event of a security breach.

E. Compatibility & Requirements

1. **[On-Premise/SaaS]** Acknowledge review of County's Technology Standards and provide narrative as to the compatibility of the elements listed that is applicable to the proposed solution.

Desktop hardware

Windows operating system

Web Browsers

Compatibility with collaboration and web publishing tools

SSL Encryption

ESRI GIS mapping functionality

Android and IOS mobile operating systems

2. **[On-Premise/SaaS]** Does your proposed solution have specific network requirements for characteristics such as bandwidth, Protocols, TCP Ports, Latency, Packet loss, Jitter or other network characteristics? Identify and discuss those requirements.
3. **[On-Premise/SaaS]** The County has many software in use. The proposal should not compromise existing software. Discuss any known incompatibilities with other software.
4. **[On-Premise/SaaS]** Describe any dependencies with 3rd party software/services, e.g., Java, .NET, Crystal Reports, MySQL, including the supported version(s) of the software and whether the proposal includes the software, its licensing and its installation.
5. **[On-Premise/SaaS]** Identify and discuss any known hardware compatibility issues and requirements.
6. **[On-Premise/SaaS]** Describe the use and requirements of all County resources that are expected to be used in the proposal, e.g., DHCP services, DNS services, SMTP services, electrical power, uninterruptible power supplies, video conferencing, data center rack space, word processing software, cooling capacity, training facilities.

F. Business Continuity and Disaster Recovery

1. **[SaaS]** Submit information on Cloud Service Provider and physical infrastructure including locations and internet connectivity.
2. **[SaaS]** Submit Business Continuity and Disaster Recovery plans.
3. **[SaaS]** Submit descriptions of any Data Center(s) pertinent to the proposal including their Tier and salient characteristics.
4. **[SaaS]** Describe the backup plan for the proposal.
5. **[SaaS]** Describe the Who, What, When, Where, Why and How of the software escrow.
6. **[SaaS]** Describe the Who, What, When, Where, Why and How of recovering the County's data should the successful Contractor cease operations.

G. System Monitoring and Alerting

1. **[On-Premise/SaaS]** Describe the system's capabilities that support system monitoring and alerting in Netreo Omnicenter system or another monitoring and management system.

H. Hardware and Software

1. **[On-Premise/SaaS]** Submit a complete itemized schedule of all hardware contained in the proposal.
2. **[On-Premise/SaaS]** Submit a complete itemized schedule of all software contained in the proposal.
3. **[On-Premise/SaaS]** Should your solution require additional software, hardware, etc., Offerors to acknowledge that the County may separately procure the proposed hardware and software, other products or its equivalent specified by the Contractor, or substitute functionally equivalent hardware, software or other products for use in the proposed system. Confirm that such procurement or substitution shall have no effect on Contractor's warranty, support, or other obligations.