



Request for Proposals for Software and Implementation Services for an Enterprise Resource Planning (ERP) Software Systems Environment

Solicitation Due Date: Wednesday, March 25, 2026 **Time:** 4:00 p.m. (Central Time)

All Proposals must be received by Wood County by the date and time cited above. Proposals received after the deadline will not be considered. It shall be the Proposer's sole risk to ensure submission by the designated time.

VENDORS ARE STRONGLY ENCOURAGED TO READ THE ENTIRE SOLICITATION.

Solicitation packages, including copies of the RFP, can be obtained by downloading from the County's website, <https://www.woodcountywi.gov/>. Should you experience problems downloading the solicitation, contact helpdesk@woodcountywi.gov.

All questions concerning the RFP **must** be submitted by the deadline identified in Section 1.5, and via email only, to Sharon Dvoran (Sharon.dvoran@woodcountywi.gov) and in accordance with the General Instructions identified within this solicitation in Section 4.1. Communications with other County staff other than for assistance with downloading the solicitation may disqualify you from the evaluation process.

Forms, Worksheets, and Other Attachments

Attachment A – Proposal Forms (See MS Word document "Wood County ERP RFP – Attachment A.docx")

Attachment B – Functional and Technical Requirements/Capabilities (See MS Excel spreadsheet "Wood County ERP RFP – Attachment B.xlsx")

Attachment C1 – Cost Worksheets (See MS Excel spreadsheet "Wood County ERP RFP – Attachment C1.xlsx")

Attachment C2 – Cost Narrative (See MS Word document "Wood County ERP RFP – Attachment C2.docx")

Attachment D – Confidential Information Form (See MS Word document "Wood County ERP RFP – Attachment D.docx")



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1. RFP Introduction and Background

1.1 Introduction

Wood County is soliciting Proposals from Proposers capable of satisfying the needs for software and consulting services to implement a new software systems environment to address the County's needs related to Enterprise Resource Planning (ERP).



In addition to soliciting written responses, this document provides information to assist Proposers in preparing their responses and facilitates the subsequent evaluation and comparison process. In that regard, this RFP:

- Provides information essential to soliciting meaningful recommendations and realistic commitments from the Proposers
- Specifies the desired format and content of Proposals in response to this RFP
- Outlines the County's evaluation and selection procedures
- Establish a schedule for the preparation and submission of Proposals in response to this RFP

This RFP and the selected Proposal in response to this RFP will be incorporated into the contract resulting from this solicitation.

1.2 About the County

Wood County is located in central Wisconsin and is home to about 75,000 residents. The county government seat is based in Wisconsin Rapids and has several offices located across the county. Implementation of the new system is planned to begin in 2026 with a completion date yet to be determined. Wood County's fiscal year begins January 1st, and the Capital Improvement Plan is developed along with the yearly budget during the preceding late spring and summer. Our current HR and Payroll system software is Sage HRMS. We would want a minimum of 15 years of job history and payroll history to be migrated to a new system.

Wood County is currently using:

- Human Resources - Sage HRMS
- Payroll - Sage HRMS
- Recruiting – Visibility Software CyberRecruiter
- Onboarding - In-house
- Timekeeping – TimeStar and RtVision
- Finance and General Ledger – Microsoft Dynamics GP (end of support in 2029)
- County Operating Budget – Questica
- Performance Management - In-house
- Learning Management - In-house

Additional functional area statistics can be found in Section 2.1 Table 3.



1.3 Project Objectives

The County is planning to replace its current software systems with a new system or combination of software systems, and to adopt systems functionality to support core processes. In doing so, the County seeks to address several challenges in the current environment, and gain future efficiencies, including, but not limited to:

- Easily adding or changing employee information
- Automation of employee reports when trainings are due
- Employee performance reviews with score within HR system
- Easy management of benefit charges
- An employee self-service that includes W2s and is accessible to employees from non-company devices
- Easy view of job history, performance reviews, and wage changes for employees
- Easy customizable report building and running reports
- No double entry of employee data
- Easily track vacant positions

Our current HR and Payroll system software is Sage HRMS. We would want a minimum of 15 years of job history and payroll history to be migrated to a new system.

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- Performance Management - In-house
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1.4 Definitions

In order to simplify the language throughout this RFP, the following definitions shall apply:



- ADDENDA – Written instruments issued by the County prior to the date for receipt of Proposals that modify or interpret the RFP documents by addition, deletions, clarification, or corrections
- COUNTY – Wood County, Wisconsin
- COUNTY EVALUATION COMMITTEE – The team of County staff that will participate in the review and evaluation of proposals and subsequent evaluation processes, including demonstrations and reference checks
- COUNTY PROJECT MANAGER – The person designated by the County to be the County Project Manager assigned to act on behalf of the County during the term of the resulting Contract
- CONTRACT DOCUMENTS – The RFP, submitted Proposals, including any diagrams, Addenda, and a form of agreement between the County and the Contractor, including all change orders, insurance certificates, exhibits, amendments, and attachments
- CONTRACTOR – The Contractor(s)/consultant(s) that may be awarded a contract to provide software system(s) and professional services to implement the ERP System for the County
- DAYS – Means calendar days unless otherwise specified
- ENTERPRISE RESOURCE PLANNING SYSTEM (ERP) – Means the financial management, human resource information software system that is described in this RFP and in the Attachments hereto
- PROJECT – The project to configure and implement the ERP System for the County as described in this RFP and in the Attachments hereto
- PROJECT SCOPE – Scope of services to be provided by the Contractor(s).
- PROPOSAL – A complete and properly signed Proposal to provide goods, commodities, labor, or services for the sum stated and submitted in accordance with the RFP guidelines
- PROPOSER or VENDOR – The person, Contractor, corporation, partnership, or other entity submitting a proposal on items listed in the RFP documents, and thereby agreeing to meet the specified Contract terms and conditions if awarded the contract
- SERVICES or WORK – All services to be performed by the Contractor to successfully complete the Project to the satisfaction of the County
- SUBCONTRACTOR or SUBCONSULTANT – Any individual, corporation, company, or other entity that contracts to perform work or render services to a Contractor or to another subcontractor as part of this Contract with the County



- VENDOR – See “PROPOSER”

1.5 RFP Schedule of Events

The following RFP Schedule of Events represents the best estimate of the schedule Wood County will follow, which is subject to change at the County’s discretion. Vendors are encouraged to hold the demonstration dates listed. If a component of the schedule is accelerated or delayed, it shall be anticipated that the remaining components may also be adjusted by a similar number of days via RFP Addendum prior to the submittal deadline.

Table 01: RFP Schedule of Events

Event	Estimated Date
RFP Published	January 28, 2026
Deadline for Questions from Vendors	February 25, 2026
Deadline for Proposal Submissions	March 25, 2026, at 4:00 p.m. CT
Shortlist Vendors Notified	Week of April 27, 2026
Vendor Demonstrations	Weeks of May 4 and May 11, 2026

1.6 Prequalification of Vendors

Wood County has not employed a prequalification process. No Vendors are either prequalified or precluded from responding to this RFP. Prior to issuing this RFP, the County did publicly issue a request for information to aid in surveying the software marketplace for the availability of solutions that provide one or more functional areas contained in this RFP. The responses received during this request for information process have been used to help inform the planning and decisions for this RFP and requested high-level information and costs from vendors that responded. The County conducted informal discussions with vendors leading up to the issuance of this RFP.

1.7 Minimum Qualifications

For Proposals to be evaluated and considered for award, Proposals must be deemed responsive to this RFP as determined in the discretion of the County Evaluation



Committee. To be deemed responsive, the submitted Proposal documents shall conform in all material respects to the requirements stated in the RFP, and Proposers shall document and validate the capability to fully perform all requirements defined by the RFP. Factors to be considered in connection with a Proposer's capability to fully perform all requirements of the RFP include, and may not be limited to: experience, integrity, reliability, capacity, and other factors required to provide the Services defined by the RFP.

1.8 Non-Warranty of RFP Information

Due care and diligence have been exercised in the preparation of this RFP and all information herein is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure to risk and verification of all information herein shall rest solely on those parties making Proposals. Wood County, its representatives, and its agents shall not be responsible for any error or omission in this RFP, nor shall they be responsible for the failure on the part of any Proposers or their representatives to verify the information herein and to determine the full extent of that exposure.

2. Project Scope

2.1 Functional Areas

The following table contains the list of functional areas of the future systems environment. Each table is divided into functional areas that are required in a new system upon implementation, preferred functional areas in a new system, and required functional areas that can be added after initial implementation.

Table 02: Functional Areas	
Required	
Human Resources, Personnel Management, and Employee Relations	
Employee Self Service	
Payroll	
Recruitment and Onboarding	
Benefit Administration	



Preferred
Learning Management
Budgeting
Applicant Tracking
Time and Attendance

Required with timing TBD
General Ledger and Financial Reporting
Accounts Payable
Capital Asset Accounting

Optional
Accounts Receivable
Project Accounting and Grant Management
Purchasing

The List of Functional and Technical Requirements/Capabilities contained in **Attachment B – Functional and Technical Requirements/Capabilities** contains the detailed functionality the County requires within each functional area in a future systems environment, as well as general and technical system requirements, and data conversion and interface scope. The following table contains functional statistics of the County. These statistics are estimates and are provided for planning purposes only.

Table 03: Functional Area Statistics

Functional Area	Statistics
Human Resources and Personnel Management, Benefit Administration, Applicant Tracking	
Full-time employees	556 in 2024
Part-time employees	206 in 2024
Seasonal employees	Typically, less than 10



Number of retirements per year	15
Number of applicants per year	1,850
Number of recruitments per year	230
Number of personnel transactions per year	2,250
Number of worker compensation per year	25
Number of bargaining/ union groups and who	1 Wood County Deputy WPPA/LEER
Open enrollment period	October



Benefit plans	<ul style="list-style-type: none">• Medical Insurance• Dental Insurance• Vision Insurance• Medical Flexible Spending Account• Limited Purpose Flexible Spending Account• Dependent Care Flexible Spending Account• Health Savings Account• Short Term Disability• Long Term Disability• Basic Life Insurance (Term)• Supplemental Employee, Spouse, and Children Life Insurance (Term)• Whole Life Insurance• Accident Insurance• Critical Illness Insurance• WRS Retirement Plan• WRS Additional Contributions (through payroll deduction)• 457(b) Deferred Compensation Plan (Pre & Post-Tax Options)• Post-Employment Health Plan (PEHP)• Paid Holidays (10)• Vacation Time• Sick Time• Comp Time (Non-Exempt <u>and</u> Exempt both earn)• Bereavement Leave• Edvest 529 College Savings Plan• Employee Assistance Program (EAP)• Wellness Program (Health Insurance Premium Discount & Cash Prizes)• Tuition Assistance
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Time and Attendance	
Number of departments using time clocks	2 departments using physical time clocks 1 department using web time clocks
Number of employees using time clocks	150 employees using physical time clocks 25 employees using web time clocks
Payroll	
Number of W2's per year	Around 900
Pay frequency	Biweekly for all employees County Board members are paid once a month on the last paycheck of the month
Number of employees paid per cycle	Average of 685
Distributions	Employees with pay % distributed to multiple accounts per payroll
General Ledger and Financial Reporting	
Number of funds	45-50
Number of accounts	8,894 active 6,524 inactive 15,418 total
Number of journal entries annually	4750-4900 (does not include cash receipt or payable entries)
Chart of accounts	<ul style="list-style-type: none"> • Fund (3 digits) • Department (4 digits) • Function (5 digits) • Project (3 digits) • Object (3 digits)
Accounts Payable	
Number of active vendor files	9,508 currently
Number of invoices submitted for payment per year	22,339 in 2024



Number of 1099s issued per year	250 in 2024
Number of payments per year	10,774 in 2024
Type of check stock	Custom printed laser checks with stub at top and bottom, two horizontal perforations
Budget	
Operating budget	\$140,685,614
Capital budget	\$11,022,165
Purchasing, Bids, and Contract Management	
Number of purchasing orders per year	268 purchase orders through the IT department in 2024. Individual departments handle their own purchases and not one current system for all
Number of bids, RFI, RFP, and RFQs issued annually	These are handled by individual departments and not one current system for all
Number of blanket purchase orders per year	These are handled by individual departments and not one current system for all
Number of purchase cards in use	114 P-cards are through US Bank Program
Accounts Receivable and Cash Receipts	
General accounts receivable transactions per year	We do not currently use an Accounts Receivable Specific Module. Cash Receipting transactions / entries are approx. 8500-9000 annually
Number of cash collection points (including all tender types)	Types included in current software (Cash, Check, Credit Card, EFT). Receipts via mail, EFT/ACH, in person. Multiple departments enter receipts into specific checkbooks in software
Project Accounting and Grant Management	
Number of active grants	Handled by individual departments, not one current specific system for all



Number of active projects	Handled by individual departments, not one current specific system for all
Assets	
Number of fixed assets	3,390 total (active & inactive) assets in system
Fixed asset classification	375 class IDs set up in software

2.2 Alternate Proposals, Partnerships and Proposers of Subsets of Functionality

Alternate Proposals:

- Wood County will not be accepting alternate Proposals for evaluation.
- Software companies that deliver their solution through one or more consulting firms (system integrators) are also allowed to submit more than one Proposal for consideration through differing consulting firms.
- A separate Proposal package submitted in accordance with Section 4 is required in order for the County to accurately evaluate each Proposal independent of the other.

Partnerships:

Proposers are encouraged to establish partnership relationships to fully provide all requirements defined by the RFP.

- Proposers engaged in a partnership relationship shall submit a single proposal in response to this RFP.
- Partnership relationships shall be clearly defined by proposal responses. Such definition shall identify the entity in the partnership relationship deemed to be the Prime Vendor.
- Each Vendor engaged in the partnership shall respond to all applicable portions of this RFP that relate to the work that will be performed, or the capabilities provided. For example, each Vendor shall provide references, and each Vendor shall respond to the Company Background and History questions.

Proposers of Subsets of Functionality:

As part of this process, Wood County will be allowing Proposers to submit best-of-breed solutions ("point" solutions) and encourages Proposers to participate in this process to consider and evaluate a range of marketplace offerings.



- The County recognizes that the scope of functionality in this RFP may be met through a combination of systems that specialize on a modular or functional area basis. The County is willing to consider best-of-breed solutions (“point” solutions), subject to certain conditions as outlined in this section.
- The County has a preference on software solutions that provide for the highest level of fit and facilitate the exchange of information between any disparate systems.
- Proposers are encouraged to propose on a subset of functionality if the proposed software cannot provide functionality for all requested modules. Proposers may propose solutions that address a subset of functionality, provided the software is able to address, at a minimum, one of the following areas:
 - Financial Management System (Tabs 2 – 10 of Attachment B) – Vendors must also respond to Tabs 1, 15 and 16.
 - Human Capital Management System (Tabs 11- 14 of Attachment B) – Vendors must also respond to Tabs 1, 15 and 16.

This does not preclude vendors from partnering or addressing more than one of the above areas but is rather intended to identify the minimum scope that must be presented in each proposal.

The County will consider proposers of a subset of functionality on the relative merit of the functionality proposed based on the evaluation criteria laid forth in this RFP and reserves the right to enter into negotiations for one or more proposers in order to achieve a “best-of-breed” solution.

- The County reserves the right to make one or more awards to competing Proposers for subsets of functionality as a result of this RFP. In the event the County should make awards to one or more competing Proposers, it shall be expected that additional discussion will take place between the County and the Proposers to define requirements and an approach to building an integration or interface between the selected systems. In such instance, the County expects that the Proposers will work together as necessary to develop the necessary integration once one has been identified.

2.3 County and Project Staffing

Wood County intends to have functional and technical resources available during Project implementation, though it is noted that the County does not anticipate dedicating staff full-time to the implementation in addition to managing their core



job responsibilities. This applies to both functional resources as well as technical resources internal to the County. It is anticipated that some functional leads will serve as the functional lead, or a subject matter expert, across one or more modules – particularly within the financial modules of a future system – during the implementation process.

Staffing considerations are a consideration for the County in terms of both the implementation process as well as supporting the software once in operations mode. Vendors are encouraged to submit questions to the County during the RFP questions period to solicit such additional information as is necessary to adequately estimate the resource commitments that would be expected of the County during implementation, and post go-live for ongoing support of the system(s). Additional resource planning will be performed based upon the selected Proposer(s).

Proposers shall clearly indicate in the proposal responses the estimated level of County resource involvement in the implementation process, in order to allow the County to perform adequate planning. The County will utilize the response to Proposers' Resource Hour Estimates in Attachment A, Tab 3, of Proposals as an input into the staffing plan the County develops, and requests that Proposers clearly articulate estimated staffing considerations in their responses.

2.4 Deployment Model

Wood County is open to considering various deployment models and has structured the RFP to allow for the evaluation of the deployment model as but one factor in the overall procurement process. The County wishes to evaluate the greatest range of marketplace offerings feasible through this process.

The County recognizes there are many factors contributing to a comparison of cost Proposals for these various deployment methods including needed infrastructure and/or hardware costs, the potential for reduced hardware and support costs in hosted models, a particular Proposer's approach to managing upgrades, and technical staffing needs. The County has a strong preference toward a cloud-hosted deployment model but also recognizes that the scope of this opportunity may result in the award to two or more vendors to address all functionality and the County wishes to evaluate the greatest range of available solutions in the market including those that may be locally hosted by the County. As such, the County is open to considering all deployment models in light of the breadth of functionality and available solutions in the marketplace to address those functional areas. The County will consider, in no particular order, the following deployment models:



- On Premise (locally hosted at the County on County-owned servers)
- Proposer hosted (hosted and managed by the Proposer on Proposer-owned servers)
- Cloud hosted (Proposer provisions and maintains hosting on AWS, Azure, etc.)

Cost sheets have been provided under **Attachment C – Cost Worksheets** for pricing each of the deployment models.

This solicitation is not a bid process, nor will it follow a lowest-priced responsive Proposal process but will be based on what is best for the County, including the review of life cycle costs (i.e., recurring costs, hardware, third-party licenses, etc.).

In developing proposals, Proposers shall clearly define the proposed deployment model and accompanying licensing model option(s) as well as any perceived benefits of the proposed model. In the event two or more products are proposed under the same proposal (e.g., through a partnership or offered by the same company) the Proposer shall clearly indicate in both the technical proposal (Attachment A, Tab 2) and cost proposal (Attachment C) the deployment model for each proposed software product.

The County does not have a preference as to a specific hosting location but does have a requirement toward the hosting being within the contiguous United States. Vendors are requested to specify the hosting location in proposal responses, specifically as part of Attachment A, Tab 2 to proposal responses (please see Attachment A for further instruction).

2.5 Number of Users

The following user counts by module contained in the table below are estimates and are provided for planning purposes only. The number of users represents the **anticipated future number of users of a new system**.

- **Departmental (Core/Power) Users:** This category of users includes those County staff that will interact with the system modules on a regular basis and conduct core business processes within the system as power users. Such generic examples include, but are not limited to: Payroll Clerk, Financial Analyst, Payroll admin, HR Benefits admin, System Support Specialist, etc.
- **Customer Department Users:** This category of users includes those County staff that will interact with the system modules as internal customers by either



initiating transactions (e.g., entering a payment or entering a requisition), reviewing/approving transactions (e.g., reviewing leave requests, reviewing requisitions entered by a subordinate), or consuming information (e.g., reviewing departmental budget).

Table 04: Number of Users

Users		
Functional Area	Departmental Core Users	Customer Department Users
Financial Modules, including: <ul style="list-style-type: none"> • General Ledger and Financial Reporting • Budgeting • Capital Asset Accounting • Purchasing • Accounts Payable • Accounts Receivable and Cash Receipts • Project Accounting and Grant Management 	2	About 50
Human Capital Management, including: <ul style="list-style-type: none"> • Compensation • Human Resources and Personnel Management • Applicant Tracking • Benefit Administration • Payroll • Time Entry 	9	About 125
It is anticipated that some users will use multiple modules, causing overlap in each functional area. The counts are broken down by functional area to allow Proposers to formulate responses based on each. The County estimates that: <ul style="list-style-type: none"> • The total number of licensed regular daily users of the system would be about 10 ideally, we would like to assign certain roles and permissions to each user. • The total number of users using the employee self-service portal would ideally be all employees, around 965. 		



2.6 Potential Phasing and Target Live Dates

Wood County requests that proposals provide potential phase start and target go-live dates in proposal responses per Attachment A, Tab 4. These dates should be estimates based on anticipated resource requirements and dependencies between functional areas. These dates are subject to negotiation. The County anticipates that implementation activities would begin in May 2026. The County would like to target June 2027 as a potential go-live date for financial modules, and 2028 as a go-live date for human resources and payroll modules. The County follows a January 1 – December 31 fiscal year, and open enrollment occurs during October ending November.

2.7 Current Applications Environment

Wood County currently uses several software packages to support various financial and human capital management business processes and functions.

Table 05: Current ERP Functions

Current ERP Functions	System
GL and Financial Reporting	Microsoft Dynamics GP
Payroll	Sage HRMS
Budgeting	Euna Budget
Time and Attendance	Insperity Timestar / RT Vision
Accounts Payable	Microsoft Dynamics GP
Fixed Assets Accounting	Microsoft Dynamics GP
Benefit Administration	Sage HRMS
Applicant Tracking	Visibility Cyber Recruiter
Personnel Management	Sage HRMS



Other Major Applications

Wood County also uses a wide variety of applications to provide capability and functionality in specialized areas.

The proposed solution must include software functions to develop and maintain data interfaces with all systems listed below, and any future systems implemented by the County. Both County IT staff and vendor support staff must have access to view, troubleshoot, fix, and improve these interface definitions.

Many of these applications are listed in Table 06. Identification of required system interfaces is provided in Attachment B to this RFP.

Table 06: Additional Software Applications

Application	Use/Summary
eWisacwis	State application used by Human Services that integrates with Microsoft Dynamics GP and generates a response file notifying eWisacwis of checks that were printed
Euna Budget	County wide budget management software that integrates with Microsoft Dynamics GP and Sage HRMS
Aatrix	An add-in product for Sage HRMS for tax forms and eFiling
RtVision	Highway timekeeping software that exports to Sage HRMS
Cyber Recruiter	Hiring and recruiting software
ESS	In-house software
GL Validator	In-house software that connects data between Sage HRMS and Microsoft Dynamics GP
TimeStar	County timekeeping software



2.8 Project Management Documentation

The following information establishes the expectation of the minimum level of project management documentation to be provided by Proposers as a part of, but not exclusively, the resulting implementation services offered. As part of the implementation scope, following signing of a contract, the selected Contractor(s) shall develop and provide Wood County with the following items:

- **Project Management Plan:** A detailed Implementation Project Plan that, at a minimum, includes the following:
 - Objectives
 - Deliverables and Milestones
 - Project Schedule
 - Resource Management Processes
 - Scope Management Processes
 - Schedule Management Processes
 - Risk Management Processes
 - Quality Management Approach
 - Communication Management Approach
 - Organizational Change Management Approach
 - Status Reporting
- **Data Conversion Plan**
- **Training Plan**
- **System Interface Plan**
- **Testing and Quality Assurance Plan**
- **Pre- and Post-Implementation Support Plan**
- **System Documentation**
- **Risk Register**

Additional documentation about each Plan may be found in **Attachment A, Tab 3**, attached to this RFP.

2.9 Budget

Wood County is committed to funding the one-time and recurring annual costs for the acquisition of the software. The County has established a budget for this project informed in part by the recent Request for Information process but also intends to use the proposals received through this process to inform initial and ongoing budget development processes. The County has performed initial, high-level estimations, for the cloud-based software solution including professional services



and recurring maintenance/subscription costs. Recognizing the likelihood of multiple awards as a result of this RFP, a final budget will be programmed based on the results of this RFP and final contract negotiations.

The County is sensitive to the total costs; however, this is not an opportunity to identify the lowest priced solution. This RFP opportunity is being presented as a best value solicitation, and not a lowest priced bid, opportunity.

2.10 Personnel

All of Contractor's personnel providing goods and services under the contract shall possess the necessary skills, experience, and knowledge, to perform their assigned duties. In the event assigned personnel are providing non-conforming or unsuitable services, the County shall notify Contractor and provide the opportunity to rectify the deficiency. If unable to cure the nonconforming services, Contractor shall remove from the project and replace the Contractor's personnel that the County deems unsuitable for the project with a resource possessing the necessary skills, experience, and knowledge, to perform their assigned duties in a satisfactory manner.

2.11 Software Upgrades

Wood County shall be entitled to any and all upgraded versions of the software that becomes available from the Contractor. Such upgrades shall be provided at no cost to the County so long as a valid maintenance and support agreement, or if applicable software as a service agreement, is in place.

2.12 Performance Review

The Contractor may be required to meet with the County's Project Manager not less than once per quarter to conduct a performance review of the Contractor. These meetings will be either in person at County offices, or via teleconference or web-conference. This performance review will include a review of the pricing, delivery performance, customer service, and improving operational efficiencies.

3. Proposal Evaluation and Award

3.1 Evaluation Process

The following subsection outlines the intended proposal evaluation process Wood County has identified. The County reserves the right to deviate from this process at its own discretion, and to (i) negotiate any and all elements of the RFP, (ii) amend, modify, or withdraw the RFP, (iii) revise any requirements under the RFP, (iv) require



supplemental statements of information from any Proposer, (v) extend the deadline for submission of Proposals, (vi) cancel, in whole or part, this RFP if the County deems it is in its best interest to do so, (vii) request additional information or clarification of information provided in any Proposal without changing the terms of the RFP, (viii) award this project in whole or in part to a vendor based on the determination of the best overall value and/or fit for the County, and/or (ix) waive any portion of the selection process in order to accelerate the selection and negotiation with the top-ranked Proposer. The County may exercise the foregoing rights at any time without notice and without liability to any Proposer, or any other party, for expenses incurred in the preparation of responses hereto or otherwise.

a. Vendor Shortlist: The County Evaluation Committee will initially review and evaluate each Proposal received to determine the Proposer's ability to meet the requirements of the County. The evaluation criteria described herein will be the basis for evaluation. The Evaluation Committee will determine the Proposers best suited to meet the needs of the County. These Vendors will form the Vendor Shortlist.

b. Vendor Demonstrations: The County, at its sole discretion, reserves the right to have system demonstrations with those Proposers on the Vendor Shortlist, or any other Proposer. Demonstrations may be conducted at County offices or via web conference. The schedule and demonstration requirements will be provided with the invitation to participate in demonstrations. Optional modules or functionality shall not be presented if they fall outside the scope of requested functionality or that functionality which has been proposed by the Proposers. The proposed version of the software must be shown and must not include any software that is under development or in beta testing. Evaluation Committee members will view the demonstrations, and additional County staff may also be in attendance to observe and provide informal feedback.

c. Reference Checks: The County may employ a process of contacting references provided through Proposers' proposals. This process may include teleconference meetings, web conferences, and in-person meetings with references. The County reserves the right to conduct reference checks at any point in the evaluation process, and to contact other known users of the proposed system(s) beyond just those references provided.

d. Best and Final Offer and Request for Clarification: A Best-and-Final-Offer process may be initiated if it is determined to be in the best interest of the County.



Such process may be initiated following the identification of the Vendor Shortlist or at any other evaluation process step. Additional processes of scope and cost clarification may be employed as part of the evaluation process if it is deemed to be in the County's best interest.

3.2 Clarification and Discussion of Proposals

The County may request clarifications and conduct discussions with any Proposer that submits a Proposal, including requesting additional information. The County reserves the right to select the Proposal or Proposals that it believes is the most responsive as determined by the County Evaluation Committee, which will best serve the County business and operational requirements, considering the evaluation criteria set forth below. Proposers shall be available for a system demonstration to County staff on dates specified in Table 01 or as otherwise requested by the County if selected for system demonstrations. Failure of a Proposer to respond to such a request for additional information, clarification, or system demonstrations may result in rejection of the Proposal. The initial evaluation may be adjusted because of a clarification under this section. The County reserves the right to waive irregularities in the Proposal content or to request supplemental information from Proposers.

3.3 No Obligation, Right of Rejection, and Multiple Award

The inquiry made through this RFP implies no obligation on the part of Wood County. This RFP does not constitute an offer or a contract with any Proposer or other party. The County reserves the right to reject any or all Proposals, in whole or in part, and to waive any informality in proposals received, deemed to be in the best interest of the County or to accept or reject all or any part of any Proposal. Proposals deemed to be received from debarred or suspended Vendors will be rejected. The County may reject any Proposal that is not responsive to all of the material and substantial terms, conditions, and performance requirements of this RFP. The County further reserves the right to award all, part, or none of the components/functional areas included in this RFP. In addition, the County reserves the right to make one or more awards to competing Proposers for subsets of functionality as a result of this RFP. The County also reserves the right to refrain from making an award if it determines it to be in its best interest. The County reserves the right to abandon the Project and/or to re-advertise and solicit other Proposals. The County reserves the right to create a Project of lesser or greater expense than described in this RFP or the Proposer's reply, based on the component prices or scope submitted. The County reserves the right to cancel this solicitation or to change its scope if it is considered to be in the best interest of the County.



3.4 Offer Held Firm

Unless otherwise specified, all bids/proposals submitted shall be valid for a minimum period of 180 calendar days following the deadline established for receiving bids/proposals. At the end of the 180 calendar days the bid/proposal may be withdrawn at the written request of the bidder/proposer. If the bid/proposal is not withdrawn at that time, it remains in effect until an award is made, or the solicitation is cancelled.

3.5 Contract Negotiation

After final evaluation, Wood County may negotiate with the Proposer(s) of the chosen Proposal(s). If any Proposer fails to negotiate in good faith, the County may terminate negotiations and negotiate with another Proposer or terminate negotiations with any or all Proposers. If contract negotiations are commenced, they may be held at County office locations or via teleconference. If contract negotiations are held, the Proposer will be responsible for all of Proposer's costs including, without limitation and its legal fees and costs.

3.6 Failure to Negotiate

If the selected Proposer:

- Fails to provide the information required to begin negotiations in a timely manner
- Fails to negotiate in good faith
- Indicates it cannot perform the contract within the designated timeframes or within budgeted funds available for the Project
- If the Proposer and the County, after a good-faith effort, cannot come to terms;

The County may terminate negotiations with the Proposer initially selected and commence negotiations with another Proposer. At any point in the negotiation process, the County may, at its sole discretion, terminate negotiations with any or all Proposers.

3.7 Contract Type

The contract resulting from this RFP shall be in form and content satisfactory to the County and shall include, without limitation, the terms and conditions provided for in this RFP and any sample agreement provided by the County, and such other terms and conditions as the County deems necessary and appropriate. The resulting contract from this RFP shall be a not-to-exceed based contract, subject to the Payment Terms identified in Attachment A - Cost Narrative for the various cost types.



The standard of performance for the contract resulting from this RFP shall be in accordance with the highest applicable standards in the financial information software industry. The initial contract price will be based on prices submitted by the Selected Proposer, subject to contract negotiations with the County, and shall remain firm for the initial term of the contract. Price adjustments may be negotiated at the request of either party in the extension periods with mutual agreement of the parties. A party proposing a price change in an extension period must notify the other party in writing at least one-hundred eighty (180) days prior to the commencement of any extension period.

3.8 Contract Changes

Written requests for price changes, during the implementation process or thereafter, resulting from a change of scope, as initiated or requested by the County, must be submitted in writing to the County via Change Order. Any increase will be based on the Contractor's actual cost increase only, as shown in written documentation. All Change Order requests must be in writing, must not constitute increases in profit, and must contain data establishing or supporting the increase in cost. At the option of the County, (1) the request may be granted; (2) the Change Order may be modified to include a greater, or lesser, scope; or (3) the County and Proposer may continue with the Contract without change. The County will accept or reject all such written requests within ninety (90) days of the date of receipt of Contractor's request for price increase or receipt of proper written documentation, whichever is later.

If a price increase is approved, the County will issue an amendment or change order to the contract specifying the date the increase will be effective. All Services and related accessories are to be billed at prices in effect at the time the service was rendered, or order was placed. If a price increase is rejected, the Contractor will be notified and, at the option of the County, the Contract may be (1) cancelled and the solicitation may be re-advertised; or (2) continued without change.

All other Contract changes will be effective only on written agreement signed by both parties.

3.9 Contract Approval

The County's obligation will commence only following the County Board's approval of a Contract and the parties' execution of the Contract. Upon written notice to the Contractor, the County may set a different starting date for the Contract. The County will not be responsible for any work done or expense incurred by the Contractor or



any subcontractor, even such work was done, or such expense was incurred in good faith, if it occurs prior to the Contract start date set by the County.

4. Submittal Response Format

4.1 General Instructions

The following instructions must be followed by Proposers submitting Proposals. Offers that do not comply with all instructions contained herein may be disqualified:

1. **Deadline:** The deadline for Proposal submissions is established in Section 1.5. It will be the sole responsibility of the Proposer to submit its Proposal to Wood County before the closing deadline.
2. **Proposals:** Proposals shall not include extraneous marketing materials. Proposals shall not contain links to exterior data sources or materials. Any referenced material must be included as a clearly titled attachment to the proposal and thus be functional and readable independent of internet connectivity.
3. **Electronic Media Proposal File Formats and Naming:** Proposers shall submit one (1) electronic version of the Technical Proposal and one (1) electronic version of the Price Proposal via ShareTru secure file transfer. E-mail Sharon Dvoran sharon.dvoran@woodcountywi.gov to receive a proposal upload link. The following table provides the required file formats and naming conventions for the electronic media files.

Table 7: Proposal Naming and File Formats

Proposal Section	Recommended File Naming Convention	Required File Format
Technical Proposal (Inclusive of Attachments A and B and any Exhibits/Attachments)	"(Proposer Name)" Technical Proposal	All files combined into one (1) searchable Adobe PDF
Attachment B – Functional and Technical Requirements	"(Proposer Name)" Proposal Response to Attachment B"	To be submitted in Microsoft Excel format, in addition to above PDF format
Price Proposal (Inclusive of attachments C1 and C2, and any Appendices)	"(Proposer Name)" Price Proposal	All files combined into one (1) searchable Adobe PDF



Proposal Section	Recommended File Naming Convention	Required File Format
Attachment C1- Cost Worksheets	"(Proposer Name)" Proposal Response to Attachment C1	To be submitted in Microsoft Excel format, in addition to above PDF format

1. **Amendment of Proposals:** Proposers may amend Proposals prior to the deadline set for receipt of Proposals. In the event an amendment is issued, and a Proposer has previously submitted a Proposal in response to this RFP, the Proposer shall notify the County via email of the need to submit an amendment and clearly outline the reasons in writing. No amendments will be accepted after the deadline unless they are in response to a request of the County.
2. **Confidential Information:** Proposers shall clearly mark any information or graphics that are considered to be confidential as such within Proposal submissions on Attachment D- Confidential Information Form. Any designation as confidential shall be specific as to the portions of the proposal deemed confidential by the vendor, and not the entire Proposal response.

4.2 Technical Proposal Organization Guidelines

Proposers are instructed to insert the completed Tab forms (Attachment A – Proposal Response Forms) in the corresponding Tab sections as a part of their response to the Technical Proposal. The County expects that Proposers will include additional proposal content beyond simply completing the forms and worksheets provided through this RFP. The following table contains the organization guidelines for Proposal responses.

Table 8: Technical Proposal Organization Guidelines

Proposal Tab No.	Technical Proposal Section
Tab 1	Company Introduction and Relevant Experience
Tab 2	Software Solution
Tab 3	Project Approach and Implementation Methodology



Proposal Tab No.	Technical Proposal Section
Tab 4	Key Proposed Personnel and Team Organization
Tab 5	Project Schedule
Tab 6	System and Application Architecture
Tab 7	Data Conversion Plan
Tab 8	Security and Software Hosting
Tab 9	Testing and Quality Assurance Plan
Tab 10	Training Plan
Tab 11	References
Tab 12	Sample Contracts, Warranty, and Escrow
Tab 13	Exceptions to Project Scope and Contract Terms
Tab 14	Please insert the response to Attachment B, Functional and Technical Requirements, following Attachment A consolidated PDF Technical Proposal submission.

4.3 Content for Tabs 1 – 14

Tabs 1 – 13

Attachment A – Proposal Response Forms is a Word document that provides detailed instructions and requirements for the Proposer as it relates to the documents to be submitted as their RFP response and Services required for the Project. Proposers are instructed to organize Proposals in a tabbed format and to insert the completed Tab forms (Attachment A – Proposal Response Forms) in the corresponding Tabs as a part of their response to the Proposal. In addition to the information captured through the questions and tables in Attachment A, Proposers are requested to provide complementary narrative information, diagrams, and images to help substantiate and support their proposal response to each Tab section. Proposers are directed to Attachment A, which includes forms, tables, and questions, including the cost narrative



that are to be completed by the Proposer and inserted into each applicable tab of the RFP response (Tab 1 – 13).

Attachment B: Tab 14

Attachment B – Functional and Technical Requirements is an Excel document that provides detailed requirements and capabilities related to software features and functions, as well as potential interfaces and data conversion requirements. This tab is to include Proposer's response as detailed in Attachment B – Functional and Technical Requirements, which is an Excel document to be filled out by the Proposer. Proposers are to provide Attachment B in both Excel format, and also in PDF format appended to the responses to Attachment A Tabs 1 – 13.

Proposal Supplements

Any Proposer-submitted materials or documentation not specifically requested through this RFP may be included as Supplements to the Proposal.

4.4 Price Proposal

The completed Cost Worksheets as contained in Attachment C – Cost Worksheets. Proposers shall not modify the worksheets but may duplicate so each functional area has its own cost response.

5. Terms and Conditions

5.1 CONTRACTUAL REQUIREMENTS & TERMS AND CONDITIONS

The following terms and conditions apply to this RFP solicitation process and will be incorporated into the resulting contract as applicable. Wood County expects the resulting contract to include the RFP and proposal response as exhibits.

5.2 Indemnification

Vendor shall indemnify, defend, and hold Wood County, Wisconsin, harmless from and against all claims, losses, damages, or costs arising from or in any way related to Vendor's breach of the foregoing warranties. This indemnification shall not be subject to any limitations of remedies or warranties which are contained in this or any other agreement and shall survive termination of this or any other agreement between the parties hereto or thereto.



5.3 Records and Audits

The Consultant shall maintain such detailed records as may be necessary to demonstrate its performance of the duties required by this Agreement, including the date, time, and nature of services rendered. These records shall be maintained for a period of three years from the date of the final payment under this Agreement and shall be subject to inspection by the County. The County shall have the right to audit any billings or examine any records maintained pursuant to this Agreement both before and after payment. Payment under this Agreement shall not foreclose the right of the County to recover excessive and/or illegal payments.

5.4 Incurred Expenses

There is no express or implied obligation for the County to reimburse Respondents for any costs or expenses incurred in preparing Proposals in response to this RFP, and the County will not reimburse Respondents for these costs or expenses, nor will the County pay any subsequent costs associated with the provision of any additional information or presentations, or to procure a contract for these Services. The County is not responsible for any cost(s) incurred by a Respondent in preparing and/or submitting a Proposal in response to this RFP. The County will also not be responsible for any costs associated with preparing and/or participating in any systems demonstrations requested of the Respondent's products and Services.

5.5 Authorized Signatures

The proposal must be executed personally by the vendor or duly authorized partner of the partnership or duly authorized officer of the corporation. If executed by an agent, a power of attorney or other evidence of authority to act on behalf of the vendor shall accompany the proposal to become a valid offer.

5.6 Rights to Submitted Material

It shall be understood that all Proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and Proposals or referencing information submitted in response to this RFP, shall become the property of the County, and will not be returned. The County will use discretion with regard to disclosure of proprietary information contained in any response but cannot guarantee information will not be made public. As a government entity, the County is subject to making records available for disclosure.



5.7 Confidential Information

Any written, printed, graphic, electronic, or magnetically recorded information furnished by the County for the Proposer's use are the sole property of the County. This proprietary information includes, but is not limited to, customer requirements, customer lists, marketing information, and information concerning County employees, products, services, prices, operations, security measures, and subsidiaries. The Proposer and its employees shall keep this confidential information in the strictest confidence and will not disclose it by any means to any person except with County approval, and then only to the extent necessary to perform the work under the contract. These confidentiality obligations also apply to the Proposer's employees, agents, and subcontractors and Proposer shall be liable for a breach of the confidentiality obligations by any such party. On termination of the contract, the Proposer, its employees, agents, and subcontractors will promptly return any confidential information in its possession to the County.

5.8 Waiver of Claims

Each Proposer by submission of a response to this RFP waives any claims it has or may have against the County, and their respective employees, officers, members, directors and partners; The County's Representative and its employees, officers, members, directors and partners; and the County, its employees, officers and elected officials, agents, representatives, that are connected with or arising out of this RFP, including, the administration of the RFP, the RFP evaluation, and the selection of qualified Proposers. Submission of proposal indicates Proposer's acceptance of the evaluation technique. Without limiting the generality of the foregoing, each Proposer acknowledges that the basis of selection and that the evaluations may be made public in accordance with applicable law and waives any claim it has or may have against the above-named persons, due to information contained in such evaluations.

5.9 Statutory Information

Any contract or agreement resulting from this RFP shall be construed in accordance with the laws of the State of Wisconsin. Any litigation between the parties arising out of, or in connection with, the contract shall be initiated and prosecuted in federal or state court in Wood County, Wisconsin.

5.10 Non-Discrimination Clause

During the performance of the contract, the Contractor and all subcontractors will not discriminate against any employee or applicant for employment because of race, color, creed, religion, ancestry, national origin, sex, sexual orientation, disability, age,



marital status, or status with regard to public assistance. The Contractor and all subcontractors will take affirmative action to ensure that all employment practices are free of such discrimination. Such employment practices include, but are not limited to, the following: hiring, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

5.11 Force Majeure

Neither Party shall be in default by reason of any failure in performance of the resulting contract if such failure is proximately caused by causes beyond their reasonable control and without the fault or negligence of said Party including, without limitation, unforeseeable acts of nature; terrorism or other acts of public enemy; war and epidemics or quarantine restrictions ("force majeure"). If either Party is delayed at any time in the progress of the work governed by the contract by force majeure, the delayed Party shall notify the other Party in writing of such delay, as soon as is practical, of the commencement thereof and shall specify the cause(s) of such delay in the notice. The notice shall be hand-delivered or mailed certified-return receipt and shall make a specific reference to this provision. The delayed Party shall cause such delay to cease as soon as practicable and shall notify the other party in writing when it has done so. The time of completion shall be extended by contract modification for a period of time equal to the time that results or effects of such delay prevent the delayed Party from performing in accordance with this contract.

5.12 Policy Compliance

The Proposer shall, as a condition of being considered for award of the contract, require each of its agents, officers, and employees to abide by any provided County policies prohibiting sexual harassment, firearms, and all other reasonable work rules, safety rules, or policies regulating the conduct of persons on County property at all times while performing duties pursuant to the contract. The Proposer agrees and understands that a violation of any of these policies or rules will constitute a breach of the contract and will be sufficient grounds for immediate termination of the contract by the County.

5.13 Compliance with Federal, State, County, and Local Laws

Proposals must comply with all federal, state, and local laws. The contractor agrees, during the performance of work or service, to comply with all applicable codes and ordinances of Wood County, or the State of Wisconsin, as they may apply, as these laws may now read or as they may hereafter be changed or amended.



5.14 Patents and Copyrights

The successful vendor agrees to protect the County from claims involving infringements of patents and/or copyrights.

5.15 Invalid, Illegal, or Unenforceable Provisions

In case any one or more of the provisions contained in the Contract shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision thereof and this contract shall be considered as if such invalid, illegal, or unenforceable provision had never been contained herein.

5.16 County Property

The use of any and all County property by Contractor or its agents must be approved in advance by the County.

5.17 Rights of Use

The Contractor agrees that the County will own and have the right to use, reproduce and apply as it desires, any data, reports, analyses and materials which are collected or developed by the Contractor or anyone acting on behalf of the Contractor as a result of this contract.

5.18 Ownership of Data and Transition

Any and all County data stored on the Contractor's servers or within the Contractor's custody is the sole property of the County. The Contractor, subcontractor(s), officers, agents, and assigns shall not make use of, disclose, sell, copy or reproduce the County's data in any manner, or provide to any entity or person outside of the County without the express written authorization of the County.

In the event resulting Agreement is terminated for any reason, or upon expiration, and in addition to all other rights to property set forth, the Selected vendor shall: a. Incur no further financial obligations for materials, Services, or facilities under the Agreement without prior written approval of the County; b. Terminate all purchase orders or procurements and any subcontractors and cease all work, except as the County may direct, for orderly completion and transition; and c. Make available to the County, at no cost, all County data stored within the system, stored on the Contractor's servers, or within the Contractor's custody, within fifteen (15) days of termination or County request. Such data shall be provided in a machine-readable format as agreed-upon by the parties.



In the event resulting Agreement is terminated for any reason, or upon expiration, and in addition to all other rights to property set forth, the County shall: d. Retain ownership of all data, work products, and documentation, created pursuant to the resulting Agreement.

5.19 Data Privacy and Security

Contractor shall comply with all relevant federal, state, and local laws and regulations on security and privacy. Contractor shall have and follow a disaster recovery plan. Contractor shall only store and process County data within the continental United States. If applicable to the Contract, the Contractor shall back up all County data daily to an offsite hardened facility.