REQUEST FOR PROPOSALS

VALUE ADDED RESELLER SERVICES—MICROSOFT DYNAMICS GP
(PC 597)

Issue Date: June 17, 2011

Proposals Due: July 13, 2011 at 2 pm

Issued by:

Housing Authority of the County of San Bernardino
715 E. Brier Drive
San Bernardino, CA 92408
REQUEST FOR PROPOSALS
VALUE ADDED RESELLER SERVICES—MICROSOFT DYNAMICS GP (PC 597)

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C. PROPOSAL FORM
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E. DYNAMICS GP INFORMATION SHEET
HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO
Value Added Reseller Services

I. INTRODUCTION
The Housing Authority of the County of San Bernardino, hereafter referred to as the HACSB was organized in 1941, under the U.S. Housing Act of 1937. We are governed by a seven-member Board of Commissioners, which includes two tenant commissioners and five appointed by the county board of supervisors. Our main purpose is to provide affordable housing to low and moderate income families, senior citizens and disable/handicapped individuals. We also provide self sufficiency programs and non-discriminatory housing assistance services. The HACSB is seeking proposals from interested, qualified, companies or individuals to provide Value Added Reseller services for the Microsoft Dynamics GP software in addition to assisting in the development of an ongoing strategic plan to ensure our information systems and tools meet the Agency needs into the future.

II. PURPOSE
The purpose of this Request for Proposals is to solicit responses from qualified companies to furnish services to the HACSB as identified in the “Scope of Work” of this request.

III. BOARD
The powers of the HACSB are vested in its Board of Commissioners.

IV. ADMINISTRATIVE PERSONNEL
Susan Benner is the Executive Director of the HACSB.

V. SCOPE OF SERVICES
Respondents will be expected to provide Value Added Reseller Services as outlined in the attached “Exhibit A”- Scope of Work that has been provided.

VI. RFP INSTRUCTIONS

a. Contact Information
This RFP is being issued, as will any addenda by the HACSB. The contact person for the HACSB is:
   Marsha Zeller, Procurement and Contracts Dept.
   715 E. Brier Drive
   San Bernardino, CA 92408-2841
   (909) 890-0644 ext. 2176
   mzeller@hacsb.com

b. RFP Submission and Format
By this Request for Proposals, the HACSB solicits proposals to be received by 2:00 p.m. (PST) on July 13, 2011 in the form outlined below. Late submittals will not be accepted.

1. Proposals must be submitted by mail (or by fax or e-mail—see #3 below) with one (1) signed original and three (3) copies. Any general information not specifically relevant to the proposal shall be omitted or bound in a separate document. At a minimum, the proposal shall include the following:
   
   • Identification of the company or individual(s) including name, address, telephone number, fax number, and email address;
   • Name, title, address and telephone number of contact person during the period of the evaluation process;

2. Proposal shall be submitted to:

   Housing Authority of the County of San Bernardino
   Procurement & Contracts Department
   Attn: Marsha Zeller
   715 East Brier Drive
   San Bernardino, CA 92408-2841
   mzeller@hacsb.com
   Fax 909-890-2349
   Phone 909-890-0644 x2176

   Your fax/e-mail or hard-copy response shall include the following notation on the bottom left hand corner of the proposal, “Request for Proposal PC 597 for Value Added Reseller Services-Enclosed.” Please also include company/individual name on outside of envelope. The proposals will be evaluated based on the criteria established in this document. Proposals received after the specified date and time will not be accepted. Two or more companies may be selected for an interview.

3. Facsimile Copies or emails will be accepted. The signed original proposal and copies to be received within 5 days. All proposals will become property of the HACSB upon submission.

c. RFP Terms and Conditions
   The HACSB reserves the right to select more than one respondent (and will accept joint venture proposals), to select a respondent(s) for specific purposes or for any combination of specific purposes, and to defer the selection of any respondent(s) to a time of the HACSB’s choosing.
d. **Board and Staff Communications**
Under no circumstances may any member of the HACSB or any staff member other than the contact specified in Section VI. a. above be contacted during this RFP process by any entity intending to submit a response to this RFP. Failure to comply with this request will result in disqualification. All questions should be in writing and directed to the individuals identified in Section VI. a above.

e. **Timetable**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Request for Proposal Released</td>
<td>June 17, 2011</td>
</tr>
<tr>
<td>Due Date for Questions</td>
<td>July 1, 2011 at 2:00 p.m.</td>
</tr>
<tr>
<td>Posting of Responses for Questions</td>
<td>July 6, 2011</td>
</tr>
<tr>
<td>Proposals Due</td>
<td>July 13, 2011 at 2:00 p.m.</td>
</tr>
<tr>
<td>Evaluation Process/Interviews</td>
<td>Week of July 18, 2011</td>
</tr>
<tr>
<td>Board Approval</td>
<td>August 2011</td>
</tr>
<tr>
<td>Award Contract</td>
<td>August 2011</td>
</tr>
</tbody>
</table>

If you have questions regarding this proposal, you must submit them in writing to mzeller@hacsb.com no later than **2:00 PST on July 1, 2011**.

Responses to all appropriately submitted questions will be posted on the HACSB website on or before **July 6, 2011**.

The deadline for submissions in response to this Request for Proposals is **2:00 p.m. (PDT), July 13, 2011**. Telephone or fax responses will not be accepted for this request. It is the intent of the HACSB to select a Value Added Reseller—Microsoft Dynamics GP provider no later than **August 2011**.

f. **Release of Information**
Information submitted in response to this RFP will not be released by the HACSB during the proposal evaluation process or prior to a contract award.

g. **Proprietary Information**
If a respondent does not desire certain proprietary information in their response disclosed, the respondent is required to identify all propriety information in the response, which identification shall be submitted concurrently with the response. If the respondent fails to identify proprietary information, it agrees by submission of its response that those
sections shall be deemed nonproprietary and may be made available upon public request after a contract award.

h. Term of Contract
HACSB intends to award a contract for its requirements as follows:

The contract period of performance is for two base (2) years, beginning on or about August 15, 2011 and expiring August 14, 2013 with three (3) single-year option to extend the contract until no later than August 14, 2016, or until such time as terminated per the terms of the agreement. The initial engagement will be for a two (2) year period. In addition, HACSB shall have the option to extend the engagement for up to three (3) additional years, one year at a time. The option years shall be exercised by written amendments executed by the parties. After the initial three-year base period, the engagement shall be renewed, on a year-to-year basis, on a unilateral basis at the fee in the original proposal. Such renewal engagement shall be confirmed in writing.

Contractor shall perform its services hereunder in a prompt and timely manner and shall commence performance upon receipt of a written Notice to Proceed from HACSB. The Notice to Proceed shall set forth the precise date of commencement of the work.

Contractor shall make its non-exclusive services available during the entire contract period.

HACSB may award the contract at a time other than that stated in the Schedule. In which case HACSB, at its option, may shorten the duration of the contract or change the beginning and end dates, but in no case will the contract exceed the duration in as aforementioned.

e. Contract Option Years
HACSB will have the unilateral right in the contract by which, for a specified time, HACSB may elect to purchase additional services called for by the contract, or may elect to extend the term of the contract. The requirements below apply:

1. Any options that were requested by HACSB and/or contained in the Contractor’s bid or offer must have been evaluated in making the contract award prior to exercising any such options.

2. Contractor shall not be allowed to change its proposed pricing for the option years since this pricing is considered in evaluating the Contractor’s original proposal, therefore was the basis for awarding the contract unless otherwise provided herein.

3. Exercise of an option must be in accordance with the terms and conditions of the option stated in the initial contract award.
HACSB will provide a minimum of sixty days (60) written notice to the Contractor of HACSB' unilateral right to exercise the option years. The minimum time for the written notice may be waived by mutual agreement.

If HACSB does not provide written notice to the Contractor, then the contract shall conclude on July 14 of the year for which the contract was last awarded.

j. **HACSB Reserves the Right to:**
   1. Request an oral interview with, and additional information from, companies prior to final selection of a provider.
   2. Consider information about a company in addition to the information submitted in the response or interview.
   3. Reject any and all responses and waive any irregularities.

K. **Extension of Contract to Other Public Agencies:**

The prices, terms and condition of this solicitation may be extended to other governmental agencies ant the mutual agreement of both the agency and the bidding contractor. All requirements of the specifications, purchase orders, invoices and payments with other agencies would be handled directly with the successful bidders. HACSB does not warrant any additional use of the contract by such agencies. The proposer’s response as requested on the Proposal Form will in no way affect HACSB’s consideration of this bid. Exception to this must be clearly noted on the Proposer’s submission.

VII. **RFP QUESTIONS FOR PROVIDERS**

a. **Organizational and Personnel Background**
   Provide an overview of your company, emphasizing its qualifications and major organizational strengths.

b. **Experience**
   Discuss your experience, in serving as a provider of Value Added Reseller Services for Microsoft Dynamics GP.

c. **Miscellaneous Discussion Questions**
   1. Identify the specific individuals who would be assigned to work with the HACSB and specify which person would be the primary contact person with the HACSB.
   2. Provide an estimate of the time that will be required to perform the services for each Complex as outlined in Exhibit A.

d. **Price**
   Provide pricing as a listing of hourly billing rates for the rendering of the services as requested in the scope of work.  Clearly specify if any
additional expenses will be charged to the HACSB in connection with this proposal.

e. **Affirmative Action**
The HACSB requires that each respondent be an Equal Opportunity Employer:
State that the respondent complies fully with all government regulations regarding nondiscriminatory employment practices.

**VIII. RFP REVIEW**

At a HACSB meeting, scheduled after such review, some of the companies that have responded may be asked to be available for interviews. If so, those companies will be given not less than three (3) business days notice, along with the date, time and place for the interviews. Expenses will be the responsibility of the respondent.

**IX. COMPANY QUALIFICATIONS**

Proposals shall be considered from responsible organizations or individuals engaged in the performance of Value Added Reseller Services for Microsoft Dynamics GP products. Proposals must include information on competency in performing comparable services, demonstration of acceptable financial resources, and personnel staffing. The vendor shall furnish detailed information on references, as well as background and experience with projects of a similar type and scope to include as a minimum:

a. Brief history of the company

b. A listing of five (5) references where similar services were performed. The client reference shall include the name of organization, contact person, address, and telephone numbers.

c. Vendor shall describe their understanding of the project scope, their proposed approach to performing the services, and submit a proposed schedule.

**X. SELECTION CRITERIA**

All proposals will be initially evaluated to determine if they meet the following minimum requirements:

**Minimum Proposer Qualifications (pass/fail):**

a. Experience of organization: Have at least five (5) years’ experience in providing Value Added Reseller services for Microsoft Dynamics GP software for other similar sized entities with similar scope;

b. Provide at least five (5) references for which like services have been performed within the past five (5) years; The HACSB reserves the
right to contact any party that the Proposer has worked for in the past and to reject a Proposer based on past poor performance.

c. Meet other presentation and participation requirements listed in this RFP;

d. Have no outstanding or pending complaints as determined through the Better Business Bureau, State of California Department of Consumer Affairs, local law enforcement agencies, and have no unsatisfactory record of performance with any public agency; and

e. Have the administrative and fiscal capability to provide and manage the proposed services.

Proposals will be evaluated based on the selection factors listed below; the relative weight that each factor will receive in the evaluation is shown below.

**Selection Factors:**

Consultants’ submittals will be evaluated based on the criteria listed in this section. In preparing your proposal to HACSB, it is important to clearly demonstrate expertise in the areas described in this document. Because multiple areas of expertise may be required for successfully performing projects under this Roster, the Consultant, either through in-house staff or sub-consultants, must demonstrate expertise or have available adequate quantities of experienced personnel in all of the areas described.

Consultants are encouraged to identify and clearly label in their proposal how each criterion is being fully addressed. Evaluation of responses to this RFP will be based only on the information provided in the proposal, and if applicable, interviews, and reference responses. HACSB reserves the right to request additional information or documentation from the firm regarding its submittal documents, personnel, financial viability, or other items in order to complete the selection process. If a responding firm chooses to provide additional materials beyond those requested, those materials should be included in a separate section of the proposal. In submitting a proposal, the Consultant agrees that any costs or prices proposed shall be valid for a minimum of 90 days from the date of the proposal.
The following criteria with a point system of relative importance, with an aggregate total of 100 points, will be utilized to evaluate each proposal:

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting (Max. Points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firm’s Qualifications and Experience:</td>
<td>30</td>
</tr>
<tr>
<td>a) Firm’s (and Sub-consultant’s, if applicable) Qualifications and Experience as a value added reseller for Microsoft Dynamics GP products</td>
<td></td>
</tr>
<tr>
<td>b) Past performance in terms of successful completion of contracts of substantially similar nature. (References)</td>
<td></td>
</tr>
<tr>
<td>c) Financial capability to perform the contract.</td>
<td></td>
</tr>
<tr>
<td>Staffing and Methodology:</td>
<td>35</td>
</tr>
<tr>
<td>a) Capability and experience of staff to be assigned to this contract</td>
<td></td>
</tr>
<tr>
<td>b) Effectiveness of approach to assist HACSB in addressing needs.</td>
<td></td>
</tr>
<tr>
<td>Price Proposal:</td>
<td>30</td>
</tr>
<tr>
<td>Competitiveness of Fee Schedule.</td>
<td></td>
</tr>
<tr>
<td>Ownership:</td>
<td>5</td>
</tr>
<tr>
<td>Certification of MBW/WBE ownership.</td>
<td></td>
</tr>
<tr>
<td>Maximum Total Points</td>
<td>100</td>
</tr>
</tbody>
</table>

All responses to this RFP that are received will be screened for eligibility. As time permits, an evaluation panel will rate eligible proposals, according to the criteria listed above, and may conduct reference checks as part of the process. If there is insufficient information, HACSB reserves the right to request additional information and to interview firms to discuss their proposal.

Based on its evaluation, the panel will make a recommendation to HACSB’s Board of Commissioners. HACSB will contact firm, negotiate a scope of work and compensation, formalizing the agreement in a Work Order to an On-Call Contract for the services.
XI. RFP REQUIREMENTS AND CONDITIONS

Minimum Requirements
This RFP sets forth the minimum requirements that all submissions shall meet. Failure to submit proposals in accordance with this request may render the proposal unacceptable.

Cost of the Proposal
Costs incurred by any proposer in the preparation of its response to the RFP are the responsibility of the proposer and will not be reimbursed by the HACSB. Proposers shall not include any such expenses as part of their proposals.

Submission Requirements
Forms included within this Request for Proposal must be included with proposal. HUD form 5369-A, 5369-B and 5369-C. Failure to submit mandatory forms could result in rejection of the company’s proposal.

Clarification to Proposals
The HACSB reserves the right to obtain clarifications of any point in a company’s proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure of a proposer to respond to such a request for additional information or clarification could result in rejection of the company’s response or responses.

Cancellation of the RFP
The HACSB reserves the right to cancel this RFP at any time, for any reason, and without liability if cancellation is deemed to be in the best interest of the HACSB. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

Collusion
Proposer, by submitting a proposal, hereby certifies that no officer, agent, or employee of the HACSB has a pecuniary interest in this Proposal; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other proposer; and that the proposer is competing solely in its own behalf without connection with, or obligation to any undisclosed person or company.

Contacts
All questions concerning the RFP shall be directed to Marsha Zeller, whose contact information is provided above in section VI-RFP INSTRUCTIONS item a. To avoid all appearances of impropriety proposer should only contact the above referenced staff person and should not attempt to contact any HACSB Commissioner or the Executive Director. No oral request for clarification or information will be accepted. All such requests must be in writing (by email, mail, fax, or hand delivery) and submitted to the HACSB no later than 2:00 PST on July 1, 2011. All questions and clarifications shall be answered in one written addendum, to be issued no later than July 6, 2011 to all respondents who have
been duly recorded as having received a copy in the HACSB’s RFP distribution log.

**Disputes**

In case of any doubt or differences of opinions as to the participation sought hereunder, or the interpretation of the provisions of the RFP, the dispute process shall apply.

Vendors may appeal the recommended award, provided the appeal is in writing, contains the RFP number, is delivered to the address listed in Section VI, a. of this RFP, and is submitted according to the time requirements listed below. The following shall apply to protests (unless otherwise specified, this section will use the term “protest” to also include disputes and appeals):

**Solicitation:** Vendors may protest a solicitation issued by HACSB. It must be received by the Contracting Officer before the bid or proposal submittal deadline, or it will not be considered.

**Award RFP:** Any protest against the award of a contract based on an RFP must be received by the Contracting Officer no later than two full business days after the bid submittal deadline, or before award of the contract, whichever is earlier, or the protest will not be considered.

**Award RFP/RFQ:** Any protest against the award of a contract based on an RFP or RFQ or appeal of a decision by HACSB to reject a proposal, must be received in writing by the Contracting Officer within three business days after notification to an unsuccessful proposer that they were not selected, or the protest will not be considered.

**Rejection of Bid:** Any protest of a decision by HACSB to reject a bid submitted in response to an RFP must be received by the Contracting Officer within two business days after being notified in writing of HACSB’s decision, or the appeal will not be considered.

A written response will be directed to the appealing Vendor within fourteen (14) calendar days of receipt of the appeal, advising of the decision with regard to the appeal and the basis for the decision.

The decision of the HACSB shall be final and binding upon all parties.

**XII. INSURANCE REQUIREMENTS**

A. **Proof of Insurance**, shall not be terminated or expire without thirty (30) days written notice, and are required to be maintained in force until completion of the contract. The Contractor shall require all subcontractors used in the performance of this contract to name HACSB as an additional insured. Following are the standard types and minimum amounts.

- **General Liability:** $1,000,000; per occurrence for bodily injury, personal injury and property damage liability; *HACSB Additional Insured* or,
Commercial General Liability: $3,000,000; combined single limit bodily and property damage liability per occurrence; HACSB additional named insured.

Comprehensive Automobile Liability: $1,000,000; combined single limit bodily and property damage liability per occurrence and aggregate; HACSB Additional Insured.

Errors and Omissions Liability: $1,000,000; combined single limit bodily and property damage liability per occurrence and $3,000,000 aggregate or,

Professional Liability: $1,000,000; per occurrence and aggregate.

Workers’ Compensation: statutory limits or,

Self Insurance Program: a State Approved program in an amount and form that meets all applicable requirements of the Labor Code of the State of California.

Environmental Liability: $500,000; per occurrence and aggregate; HACSB Additional Insured.

Owner’s Liability: 100% of insurable value of the work, Builder’s Risk, Extended coverage for Vandalism and Malicious Mischief, if required; HACSB additional named insured.

Fire Insurance with Extended Coverage: 100% of insurable value of the work; Builder’s Risk, Extended coverage including Vandalism and Malicious Mischief, if required; HACSB Additional Insured.

B. Failure to provide proof of insurance or failure to maintain insurance as required in this bid, or by law; are grounds for immediate termination of the contract. In addition, the awarded bidder should be liable for all re-procurement costs and any other remedies under law.

C. Indemnification and Insurance Requirements

1. Indemnification

The Contractor agrees to indemnify, defend and hold harmless HACSB and its authorized officers, employees, agents and volunteers from any and all claims, actions, losses, damages, and/or liability arising out of this Contract from any cause whatsoever, including the acts, errors or omissions of any person and for any costs or expenses incurred by HACSB on account of any claim therefore, except where such indemnification is prohibited by law.

2. Additional Named Insured

All policies, except for the Workers' Compensation, Errors and Omissions and Professional Liability policies, shall contain additional endorsements
naming HACSB and its officers, employees, agents and volunteers as additional named insured with respect to liabilities arising out of the performance of services hereunder.

3. Waiver of Subrogation Rights

The Contractor shall require the carriers of the above required coverages to waive all rights of subrogation against HACSB, its officers, employees, agents, volunteers, Contractors and subcontractors.

4. Policies Primary and Non-Contributory

All policies required above are to be primary and non-contributory with any insurance or self-insurance programs carried or administered by HACSB.

6. Proof of Coverage

The Contractor shall immediately furnish certificates of insurance to HACSB Procurement Department administering the Contract evidencing the insurance coverage, including the endorsements above required, prior to the commencement of performance of services hereunder, which certificates shall provide that such insurance shall not be terminated or expire without thirty (30) days written notice to the Department. Contractor shall maintain such insurance from the time Contractor commences performance of services hereunder until the completion of such services. Within sixty (60) days of the commencement of this Agreement, the Contractor shall furnish certified copies of the policies and all endorsements.

7. Insurance Review

The above insurance requirements are subject to periodic review by HACSB. HACSB's Risk Manager is authorized, but not required, to reduce or waive any of the above insurance requirements whenever the Risk Manager determines that any of the above insurance is not available, is unreasonably priced, or is not needed to protect the interests of HACSB. In addition, if the Risk Manager determines that heretofore, unreasonably priced or unavailable types of insurance coverage or coverage limits become reasonably priced or available, the Risk Manager is authorized but not required, to change the above insurance requirements, to require additional types of insurance coverage or higher coverage limits, provided that any such change is reasonable in light of past claims against HACSB, inflation, or any other item reasonably related to HACSB's risk. Any such reduction or waiver for the entire term of the Agreement and any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this agreement.
Agreement. Contractor agrees to execute any such amendment within thirty (30) days of receipt.

XIII. CONTRACT CONDITIONS

Americans with Disabilities Act
Proposer must comply with all applicable requirements of federal and state civil rights law and rehabilitation statues.

Law of the State of California
The resulting contract will be entered into within the State of California and the law of said state, whether substantive or procedural, shall apply to the contract, and all statutory, charter and ordinance provisions that is applicable to public contracts within the County of San Bernardino and the State of California shall be followed with respect to the contract.

Contract Terms and Final Selection
The selected Contractor will be expected to sign the HACSB’s Contract Agreement, which will specify the term of service.

HACSB reserves the right to make an award based solely on the original proposals received or to negotiate further with vendors. The vendors selected to be placed on the list will be chosen based on assessment of the greatest benefit to HACSB.

If the selected applicant and the HACSB cannot come to terms with respect to the contract, the HACSB reserves the right to select the next most qualified applicant or to terminate this RFP and to re-issue a new RFP if no Proposer is acceptable to the HACSB.

HACSB will not award contracts to vendors that are debarred, suspended or otherwise determined ineligible by HUD or other government agencies, or to vendors that HACSB has determined to be non-responsible. Prior to contract award, HACSB shall establish contractor responsibility by review of proposed vendors’ ability and competence to perform he contract successfully, and to ensure that they have a satisfactory record of performance and integrity. A determination of non-responsibility may be based on, without limitation, unsatisfactory performance on other contracts with HACSB or another Housing Authority, or on other contracts of a similar nature.
EXHIBIT A
REQUEST FOR PROPOSALS (RFP)

Scope of Work

GENERAL OBJECTIVES
Following is list of the high-level objectives HACSB would like to achieve selecting a Microsoft Dynamics GP partner (VAR):

1. Enhance the efficiency of our system use and reporting
2. Strengthen the Agency’s knowledge of practical tools for GP
3. Share with support staff and end users guidance, best practices and industry standards for GP and recommend useful third party modules
4. Assist in developing an ongoing strategic plan to ensure our information systems and tools meet our needs into the future

SCOPE OF WORK/DELIVERABLES
HACSB seeks a qualified Microsoft Certified Partner that specializes in Dynamics GP to assist its staff in managing the current GP environment. Upon selection the chosen partner will:

1. Become the Microsoft Dynamics Value Added Reseller (VAR) for HACSB
   • Identify any available discounts or governmental pricing to HACSB
2. Assist with the successful upgrade to GP 2010 R2
3. Upgrade all third party solutions within GP to the latest versions
4. Assist with the installation with new third party solutions not yet implemented (SmartConnect & SmartView)
5. Provide guidance on best practices or training and documentation where appropriate
6. Meet with a core team to review and prioritize existing and potential future requirements (Strategic Plan)
   A. Create a reporting roadmap based on long-term considerations (Business Portal, Report Manager, SQL, or any other third party solution)
      • Standardize reporting tools
      • Review and evaluate the lifecycle (effectiveness and usability) of each reporting tool currently in use
      • Document all reports, including those that are subsequently manipulated in Excel
      • Evaluate delivery methods for reports, i.e. push, pull, e-mail and formats (excel, pdf, etc.)
      • Eliminate data movement by using best practices for real-time and near real-time reporting
      • Consider and evaluate consolidating systems over the long term by creating a real data-warehouse from which to generate reports
- Evaluate the data flow between the various databases to define common data elements and areas for improvement in performance, accessibility and usability

B. Review requirements of the Agency and determine which module or system solution serves best for the Agency
- Finance (Great Plains Dynamics)
- Procurement (Great Plains Dynamics & E-Requester)
- Public Housing (VisualHomes)
- Housing Choice Voucher (VisualHomes)
- Two thousand Multifamily units & four commercial units owned by the Agency and their partner at ninety different property locations (Not yet implemented)

LOCATION OF WORK
As appropriate, Partner will perform the work remotely or at HACSB administrative office.

EVALUATION CRITERIA
HACSB will use a best value method for selecting the most advantageous partner to provide these services. All proposals provided to HACSB will be evaluated against the following criteria:
1. Partner’s technical expertise in executing similar projects and past performance as evaluated by contacting professional references
2. Overall experience of the proposed staff to be assigned to the engagement
3. Cost of partner’s services as measured by proposed pricing

INSTRUCTIONS FOR SUBMISSION OF PROPOSAL
Proposals should provide a straightforward, thoughtful and a concise description of the partner’s capabilities to satisfy the requirements of the RFP.

Please note: Partners submitting a proposal in response to this RFP will be required to be available for an interview discussing the scope of their proposal. This interview may provide an opportunity for the partners to clarify or elaborate on the proposal but will in no way change the original submission.

INFORMATION TO BE PROVIDED
To be considered responsive to this RFP and to facilitate evaluations, submittals should address and be organized in the order of the outline given below and include the following information. Please refer to the section of this RFP on Submission Requirements for information on Required Number of Copies. Submittals should be limited to a total of eight (8) pages in not less than 11-point type (cover letter, resumes and other required attachments are not included in the page limitation.)
Each proposal must have a Cover Letter briefly summarizing the firm’s qualifications and past experience relevant to the scope. A principal or officer of the firm authorized to execute contracts or other similar documents on the firm’s behalf must sign the letter.

The cover letter should contain at a minimum, the following information:

- Proposer’s firm name
- Contact person responsible for the proposal process
- Telephone/Fax numbers and e-mail addresses for partner principals and individuals work on HACSB’s proposal.
- Mailing address of the proposer’s firm.

The proposer must submit a letter of authorization from Microsoft that they are an authorized value added reseller and Dynamics GP Business Partner.

Your proposal will be evaluated on the following:

1) Firm’s and Sub-consultants’ Qualifications (relates to Evaluation Criterion 1)
   a) Outline a history of your firm’s experience on the work required for the Contract to be executed based on this RFP. To be qualified to respond, firms must possess at least five years of experience in providing services to governmental entities, not-for-profits or other organizations.
   b) Identify all Sub-consultants you may use on the Contract resulting from this RFP, indicate their specific role(s), and outline their experience on similar or related work.
   c) Provide a list of members of the proposed team, indicating the specific role of each member, and clearly identify the Account Manager.
   d) Describe any special manufacturer certifications or reseller levels that your firm holds.

2) Staffing and Methodology (relates to Evaluation Criterion 2)
   a) Describe how you will approach assisting HACSB with our needs. Also discuss the communication process used to discuss issues/planning with HACSB.
   b) Describe in detail what “value-added” services you will offer to HACSB, and the benefits of these services.
   c) Describe your knowledge of third party solutions compatible with Microsoft Dynamics GP that may benefit HACSB.
   d) Provide a list of members of the proposed team, indicating the specific role of each member, and clearly identify the Account Manager.
   e) Provide a brief professional resume for each key member of the proposed team (including sub-consultants), indicating the extent of his/her experience on projects related to this type of work.
3) **Price Proposal** (relates to Evaluation Criterion 3)
   
a) Complete and submit the attached Proposal Form.

4) **References** (relates to Evaluation Criteria 1 & 2)
   
a) Provide five (5) recent references (name and current contact information) who may be contacted concerning your firm’s performance on this type of service.
EXHIBIT B

Contact Information Form

To: Marsha Zeller, Procurement and Contracts Dept.
(900) 890-0644 Ext 2176, (909) 890-2349 Fax, e-mail
mzeller@hacsb.com

This fax is to acknowledge that we are in receipt of your RFP #PC597 Value Added Reseller Services—Microsoft Dynamics GP and have noted our intention to bid.

Vendor Name: _______________________________________________

Address: _____________________________________________________

Contact/Title: _________________________________________________

Phone: ______________________________________________________

Fax: ________________________________________________________

Email: ______________________________________________________

I PLAN TO SUBMIT A BID.

☐ Yes, I will be submitting a bid.
☐ Maybe, I need to research and get more information (contact HACSB-information listed above)

NO BID. Indicate any of the following. We:

☐ Do NOT desire to be retained on the vendor list.
☐ Desire to be retained on the vendor list, but decline to bid based on the following:
  ☐ Cannot comply with specifications/scope of work, Explain: ________________________________
  ________________________________________________________
  ________________________________________________________
  ________________________________________________________
  ________________________________________________________
  ________________________________________________________

☐ Cannot meet delivery requirements, Explain: ________________________________
  ________________________________________________________
  ________________________________________________________
  ________________________________________________________

☐ Do not regularly provide this type of product/service
☐ Other, Explain: ________________________________
  ________________________________________________________
  ________________________________________________________

Please update my information as listed above.

HOW YOU FOUND OUT ABOUT THE BID. Indicate any of the following. We:

☐ Checked the agency website
☐ Received notice by fax or e-mail
☐ Newspaper Ad, please list paper: ________________________________
☐ Trade Publication, please list: ________________________________
☐ Plan Room, please list: ________________________________
☐ Other, Explain: ________________________________________________
Proposal: **Value Added Reseller Services—Microsoft Dynamics GP PC 597**

Vendor Name:

To: The Housing Authority of the County of San Bernardino
715 E. Brier Drive
San Bernardino, CA 92408

1. The undersigned, having familiarized themselves with the local conditions affecting the cost of the work, and with the Specifications, if any thereto, hereby proposes to furnish all labor, materials, equipment and services required to provide such service(s) described in the scope of work in accordance therewith, for the sum of:

| Attach your Hourly fee schedule to perform services as requested in the Scope of Work—Exhibit A |

2. Please indicate if this bid will be extended to other Public Agencies:

   [ ] Yes  [ ] No

3. In submitting this proposal it is understood that the right is reserved by the Housing Authority of the County of San Bernardino to reject any and all proposals. If written notice of the acceptance of this proposal is mailed, telegraphed, faxed, or delivered to the undersigned within sixty (60) days after the opening thereof, or at any time thereafter before this proposal is withdrawn, the undersigned agrees to a contract/agreement in the prescribed form and furnish any required insurance requirements within ten (10) days after the contract is presented to him for signature.
NOTE: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.

Date ________________, 20___

(Company Name)

(Official Address)

(By)

(Title)

(Contractors State License Number)

(Telephone Number)
**CURRENT CLIENT REFERENCES (required)**

*Submit this form with the BID, failure to do so is grounds for disqualification.*

<table>
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<tr>
<th>Company</th>
<th>Address</th>
<th>City, ST, Zip</th>
<th>Fax/Phone Numbers</th>
<th>Contact Name/Title</th>
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Proposer’s Company Name: ________________________________________________

Legal Structure: _______________________________________________________

Principle Office Address: ______________________________________________

City, ST, Zip: ____________________________

Phone Number & Fax Numbers: ___________________________________________

Email: ____________________________

Federal Employer Identification Number: _________________________________

Title of Person Authorized to Sign: _____________________________________

Print Name of Person Authorized to Sign: _________________________________