

TOWN OF MOULTONBOROUGH, NH

Invitation for Proposals

Software Procurement Services

June 21, 2012



Joel R. Mudgett, Chairman

Board of Selectmen



TOWN OF MOULTONBOROUGH

Invitation for Proposals

Software Procurement Services

Sealed proposals for the provision of Software Procurement Services will be accepted until 2:00 p.m. on Thursday, June 21, 2012 in the Offices of the SelectBoard, 6 Holland Street, PO Box 139, Moultonborough, NH 03254 at which time they will be opened and publicly read aloud.

A detailed package with information on the services to be provided, the conditions thereof, and proposal forms, is available at www.moultonboroughnh.gov (click on Paid, Volunteer and Contract Openings) or said SelectBoard offices during normal business hours.

Each proposal should be in a sealed envelope marked, Town of Moultonborough, Software Procurement Services, with the due date clearly marked. If mailed, the submission should be in a similarly marked separate sealed envelope to protect against the actual bid being opened in error. Any questions with respect to this invitation must be received, in writing by mail (above address), by email (cterenzini@moultonboroughnh.gov), or fax (603.476.5835) by Carter Terenzini, Town Administrator, no later than 4:00 p.m. on June 15, 2012. It is the proposer's responsibility to view and account for any addendums relating to this request. These will be posted on the Town web site no later than 4:00 p.m. on June 18, 2012.

The town reserves the right to reject any and all bids, and waive any minor or non-material informalities, if deemed to be in its best interests.

Joel R. Mudgett, Chairman/s/
Board of Selectmen

Posted: Town Bulletin Boards (7)
SAU

Advertised: Meredith News & Carroll County Independent 05/31/12 & 06/07/12
Manchester Union Leader: Same Dates

Mailed: Vendors List

Web: Craigslist; winnipesaukee.com; NHLGC

Scope of Work or Specifications and Conditions

1.) General Description of the Project, Materials and Quantities

The Town of Moultonborough is seeking a qualified consultant to help it design and circulate, and review responses to, a Request for Proposals to be issued for the procurement of new accounting and work flow software. The Town currently uses the products of Vadar for accounting, Abra for payroll, Vision for CAMA (which is NOT being changed), and Interware for the Town Clerk's office. The desire is to issue a Request for Proposals to vendors for a base line package that will service our "needs" and hopefully be expandable to cover our "wants" (Human Resources, Permitting, Asset Management, and the like). The hope is to find a single integrated package or suite of products that can be expanded over time, and minimize the number of vendors the Town needs to deal with after deployment.

2.) Our Timeline

We hope to follow the timeline below in terms of retaining your services:

1 st Advertising	May 31, 2012
Submissions Due	June 21, 2012
Proposals Ranked & Sent to BoS	July 5, 2012
Contract & Orientation w/Start	July 19, 2012

3.) Your Services

We see your scope of work generally following the outline below:

- a.) **Orientation:** Meeting or Telephone Conference with Town Administrator and Finance Director to review the current system(s), the primary reason for moving forward to procure a new software system, the potential end users within the organization and the desired outcome;
- b.) **User Survey:** Prepare survey of end users in hard form, Consultant Survey Tool or Town web-based survey tool, circulate, and analyze;
- c.) **User Meeting(s):** Meet on site with end users (anticipated at 8 individuals or groups for full business day) at (1 hour per allow 2hrs travel) to fully understand functionality desired from software;
- d.) **Vendor Qualifications & Outline Budget:** Prepare a recommended set of baseline criteria vendors should meet in order to submit proposals relative to their time in business, number of clients in New Hampshire, support, users group and the like, a Vendors List, and an outline budget of what we might expect to pay for our "Needs"

- and our “Wants” to ensure we are not overdesigning the Request For Proposals in terms of what we might expect to obtain for our budget;
- e.) **Functionality Checklist:** Having agreed a baseline of “Needs” and a suitable add alternative for “wants” prepare and agree a functionality checklist for inclusion in the RFP to be distributed to vendors together with our expectations for data conversion, deployment, and user training;
 - f.) **Scoring Matrix:** Price alone is not the sole criteria of suitability. Prepare and agree a scoring matrix that will be known to vendors ahead of time as to how their proposal will be reviewed and evaluated;
 - g.) **Pre-Proposal Briefing:** Conduct an On-Site Pre-Proposal Briefing and prepare an Addendum to address any questions;
 - h.) **Submission Review:** Review submissions, check references, and prepare recommendations of top three vendors to invite in for formal presentations;
 - i.) **Presentations:** Prepare score sheet for users, attend presentations of top three vendors as to their functionality and ease of use and collect comments from vendors or additional inquiries to be responded to by vendors; and
 - j.) **Final Recommendation:** Prepare final memorandum of recommendations as to which vendor to proceed to contract with.
 - k.) **Services During Deployment:** Be available on an on-call as needed basis at a fee that is fully independent of the fee for services a through j above.

4.) Your Proposal

Please follow this format and put a numbered tab before each section of your proposal:

Cover

- 1.) Cover Letter;
- 2.) A history of the firm(s);
- 3.) A specific scope of work;
- 4.) A timeline (exclusive of Town review time);
- 5.) A list of similar projects (minimum of five (5) and a maximum ten (10) in total) including a description, dollar value of your services, dollar value of software procurement, municipal contact name,, title and telephone;
- 6.) Identification, resumé and role of the Project Manager(s) to be assigned;
- 7.) Identification, resumé and role of other individuals which may be assigned to the Town’s project;

- 8.) Pricing sheet for Services During Deployment; and
- 9.) Town Proposal Form showing the lump sum fee for the totality of baseline services as outlined in Paragraph 3 a through j (inclusive of all labor, overhead, travel, per diems and the like).

4.) Delivery, Cost, Location and Timing

Your “reports” to us will be in an informal "working memorandum" style not requiring covers, extensive graphics, bindings or the like. Your payment will be a single agreed lump sum based upon the approval of the final submitted work product unless you attach an Exhibit to the Town Proposal Form showing lump sum payments tied to specific work tasks.

5.) General Conditions

- a.) If you are in default of any contract delivery date you will be given ten (10) days notice to cure the default. You will then have a period of ten (10) days to cure the default. If you do not do so we may cancel the contract.
- b.) If you propose progress payments, any contract amount due to you will be paid at ninety percent (90%) of its value. You may invoice for the balance upon the completion of the baseline services.
- c.) The term “days” will mean calendar days.

6.) Pre-Proposal Conference, Questions, and Supplements

There will NOT be a pre-proposal conference for this invitation.

Any questions with respect to this invitation must be received, in writing by mail (above address), fax (603.476.5835) or email (cterenzini@moultonboroughnh.gov), by Carter Terenzini, Town Administrator, no later than 4:00 p.m. on June 15, 2012.

***Important Note:** The answers, and any other changes or supplements to this document, will be posted on the Town web site as an Addendum no later than 4:00 p.m. on Monday, June 18, 2012. It is the bidder’s responsibility to check and verify any such changes in order to account for them in their bid. You must acknowledge issued addenda on your bid form.

7.) Proposal Date and Methods of Delivery

Sealed proposals will be accepted until 2:00 p.m. on Thursday, June 21, 2012 in the Offices of the SelectBoard, 6 Holland Street, PO Box 139, Moultonborough, NH 03254 at which time they will be opened and publicly read aloud. Each submitted bid should be in a sealed envelope marked, Town of Moultonborough, with the service or item sought and due date clearly marked.

If mailed, the bid submission should be in a similarly marked separate sealed envelope to protect against the actual bid being opened in error.

8.) Contract Award

The contract will be awarded to the most qualified and responsive bidder not solely on the basis of fee.

**Town of Moultonborough
Software Procurement Services
Proposal Submission Form
June 21, 2011
(Please Print in Ink or Type)**

Name of Proposer: _____

Address: _____

Contact Person: _____

_____ Telephone _____ Fax _____
_____ Email _____

ATTENTION: Mr. Joel R. Mudgett, Chairman
Board of Selectmen
PO Box 139
Moultonborough, NH 03254

Dear Mr. Mudgett:

Having examined the documentation provided with the subject Invitation for Proposals the undersigned proposes to furnish the services as proposed in my submission and in keeping with with the subject documents.

The undersigned acknowledges it has seen Addenda #(s) _____
(If none, write none).

If I am notified my proposal is accepted within forty five (45) days of opening, I will execute a contract for the work within fourteen (14) days thereafter.

I propose to provide the following items for the following unit pricing:

<u>Item</u>	<u>Price</u>
1.) Baseline Services (Paragraph 3 items a through j)	
A. As specified	\$ _____ (In Figures)
_____ Dollars and _____ Cents (In Words)	

NOTE: Attach a breakdown to this form if you are looking for progress payments tied to specific deliverables

2.) Services During Deployment (Paragraph 3 item k)

NOTE: Include the rate schedule in Section of your proposal.

I understand that the town reserves the right to reject any and all proposals, and waive any minor or non-material informalities, if deemed to be in its best interests.

I understand that the Town may hold my proposal for forty five (45) days prior to awarding a contract.

I certify, under the penalties of perjury, that (1) I have had an opportunity to view the full bid package and am aware it was my responsibility to perform my own due diligence appropriate to submitting this proposal, (2) I am fully authorized to submit this bid, (3) I have not engaged in discussions, negotiations, or collusion with any person to determine what my bid will be and (4) that I, to the best of my knowledge and belief, have paid all taxes, fees, assessments, betterments or other municipal charges that I owe to the Town of Moultonborough or have payment agreement in place or have filed an appeal over the same.

Signature of Proposer

Corporate

Title of Proposer

Seal

Signed this _____ day of _____, _____.