



# ALBUQUERQUE PUBLIC SCHOOLS

## Request for Proposal

RFP # 19-002-RA

**RFP Title: Infor Lawson Cloud Migration Services**

### RFP Schedule

Action	Date
RFP- Issued	6/15/2018
Pre-proposal Meeting	7/11/2018 @ 9:00 am to 10:00 am (local time)
Pre-proposal Location	6400 Uptown Blvd NE- Rio Puerco Room Albuquerque, NM
Deadline for Questions	07/20/18 @ 5:00pm (local time)
RFP Due Date and Time	07/31/18 @ 3:00pm (local time)
<i>Proposals must be received by the due date and time. No late proposals will be accepted.</i>	
Evaluation of Proposals	TBD
Contract Negotiations	TBD

### RFP Buyer Contact Information

Name	Rennette Apodaca
Phone Number	505-878-6112
E-mail	Rennette.apodaca@aps.edu
Any inquiries or requests regarding clarification of this RFP document shall be submitted to the buyer in writing. Proposers may contact ONLY the buyer regarding the terminology stated in the procurement documents.	

### RFP Submittal Location

Physical Address <b>(NO USPS MAIL)</b> <b>(*for walk-in delivery or carrier service (UPS, FedEx, etc.))</b>	US Postal Mail Address <b>(allow 10 extra days for delivery)</b>
<b>APS Procurement Department Bid Clock is the official submission time on all bids and proposals.</b>	
Albuquerque Public Schools Attention: Procurement Dept. 6400 Uptown Blvd NE Suite 500 E Albuquerque, NM 87110	Albuquerque Public Schools Attention: Procurement Dept., City Center, Suite 500 E PO Box 25704 Albuquerque, NM 87125-0704
The outer most envelope of your proposal shall be clearly labeled with the following: Proposers' business name, RFP number and RFP title, and opening date & time. Please note: if you put your sealed bid inside of a FedEx, UPS, etc. envelope, all of this information must be clearly written on that outer envelope as well.	
<b>*Please note: APS does not have a mailbox on site. For US Postal Mail, we can only accept delivery at our P.O. Box. If you send a USPS package or letter to the Physical Address, it will <u>not</u> reach our office.</b>	

### RFP Term

As Negotiated
---------------

<b>TABLE OF CONTENTS</b>	<b>PAGE #</b>
PROPOSERS' GENERAL INSTRUCTIONS	3
TERMS AND CONDITIONS	6
PROTESTS	9
RFP SCHEDULE	9
OVERVIEW	10
PROJECT OVERVIEW	10
PROJECT SCOPE	10
EVALUATION CRITERIA	15
SUBMITTAL REQUIREMENTS	16
LETTER OF TRANSMITTAL	17
PROPOSAL SUBMITTAL REQUIREMENTS AND CHECKLIST	18
RICE Report	
APS Environment Components IDB Report	
Campaign Contribution Form	
Conflict of Interest/Debarment and Suspense Certification Form	
Statement of Confidentiality	

## **PROPOSERS' GENERAL INSTRUCTIONS**

1. **Read All Documents**: Proposers should familiarize themselves with all the documents contained herein; it is mandatory that all submitted offers be in compliance with all the provisions contained in Request for Proposal. Proposers should promptly notify the Buyer of any ambiguity, inconsistency, error, or missing attachments which they may discover upon examination of the RFP.
2. This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Proposer's possession and the version maintained by APS, the Proposer acknowledges that the version maintained by APS shall govern.
3. By responding to this RFP, Proposers acknowledge and agree to the terms and conditions set forth in this RFP.
4. Responses, including proposal prices, will be considered firm for one hundred twenty (120) days after the due date.
5. Proposer shall submit one (1) original proposal, five (5) identical copies and one (1) identical electronic copy. Electronic copy is not email; please provide a Jump Drive loaded with your proposal. Fax copies are not accepted.
6. Any and all Proposals not received by the Proposal submission date and time shall be rejected. No late proposals will be accepted under any circumstances, not even if Delivery Company or Delivery Service is late. It is recommended to send your proposal early.
7. APS may in its sole discretion extend the time for the submission of offers upon a finding that it is in the best interest of the District to do so. Such extensions shall be by addendum, which may be issued before the submission due date.
8. No Addendum will be issued later than five (5) days prior to the date for receipt of Proposals, except an Addendum withdrawing the Request for Proposal, or one which includes postponement of the due date for receipt of Proposals.
9. All costs incurred by a Proposer in connection with responding to this RFP, the evaluation and selection process undertaken in connection with this procurement, and any negotiations with the District, will be borne by the Proposer.
10. Any exceptions to the scope of work and/or specifications shall be listed separately in the offer and, unless otherwise stated, specifications attached are the minimum requirements. Minor deviations to the specifications as listed, may be considered.
11. Proposers may contact **ONLY** the buyer regarding the terminology stated in the procurement documents. Other APS employees do not have the authority to respond on behalf of APS. Proposers **MAY NOT** contact other District Departments or employees. Any contact with a District Department or employee may automatically result in a rejection of any proposal. Any other communication will be considered unofficial and non-binding. Communication directed to parties other than the Buyer will have no legal bearing on this RFP or the resulting contract(s). Any response made by the District will be provided in writing to all Proposers by addendum; no verbal responses shall be authoritative.

12. Any contact during the RFP evaluation process, or attempt to have contact with the Evaluation Committee, where it is unsolicited by the Evaluation Committee's members, is grounds for disqualification of your offer.
13. Proposers will be allowed to withdraw their proposal at any time prior to the deadline for receipt of proposals. The Proposer must submit a written withdrawal request to the Buyer and signed by the Proposer to withdraw their offer. The approval or denial of withdrawal request received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.
14. Definition of Terminology: This section contains definitions that are used throughout this procurement document, including appropriate abbreviations:

“Agency” shall mean Albuquerque Public Schools (APS).

“Contract” shall mean an agreement for the procurement of items of tangible personal property or services.

“Contractor” shall mean successful Offeror.

“Determination” shall mean the written documentation of a decision of a procurement manager including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

“Desirable” the terms “may”, “can”, “should”, or “prefers” identify a desirable or discretionary item or factor.

“Evaluation Committee” shall mean a body of District employees or other representatives assigned to perform the evaluation of Offeror proposals.

“Finalist” is defined as an Offeror who meets all the mandatory specifications of the Request for Bid and whose score on evaluation factors is sufficiently high to qualify that Offeror for further consideration by the Evaluation Committee.

“Mandatory” the terms “must”, “shall”, “will”, “is required”, or “are required”, identify a mandatory item or factor. Failure to meet a mandatory item or factor will result in the rejection of the Offeror's proposal or bid.

“Offeror” or “Proposer” is any person, corporation, or partnership who chooses to submit a proposal or a bid.

“Purchase Order” shall mean the document, which directs a contractor to deliver items of tangible personal property or services pursuant to an existing contract.

“Request for Proposal” or “RFP” means all documents, including those attached or incorporated by reference, used for soliciting proposals.

“Responsible Offeror” shall mean an Offeror who submits a responsive bid and who has furnished, when required, information and data to prove that its financial resources, production or

service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services or items of tangible personal property described in the bid.

“Responsive Offer” shall mean an offer, which conforms in all material respects to the requirements set forth in the request for proposal.

15. Submitted proposals shall not be publicly opened.
16. This request for proposal may be canceled or proposals may be rejected in whole or in part when it is in the best interest of Albuquerque Public Schools.
17. The District reserves the right, in its sole discretion, to waive minor informalities in offers submitted, provided that such informalities have no effect on price, quality, quantity, fitness, delivery or any matter to be evaluated in making a selection and confer no material advantage on the Offeror whose nonconformity is waived.
18. Any sole response that is received may be rejected by the District depending on available competition and timely needs of the District. The District reserves the right to award the contract to the responsible proposers submitting responsive proposals with resulting agreements most advantageous and in the best interest of the District.
19. This procurement in no manner obligates Albuquerque Public Schools until a valid signed contract or valid Purchase Order is executed.
20. The District reserves the right to add to or delete from the Scope of Work set forth in this RFP.
21. The District reserves the right to eliminate any Proposer who submits incomplete or inadequate responses or is not responsive to the requirements of this RFP.
22. The District reserves the right to discontinue negotiations with any selected Proposer.
23. The contents of the proposals shall not be disclosed during any negotiations that may occur. A public log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to NMSA 1978, § 13-1-116, the contents of proposals shall not be disclosed to competing potential Offerors during the negotiation process. The negotiation process is deemed to be in effect until the contract is awarded pursuant to this Request for Proposals. Awarded in this context means the final required District signature on the contract(s) resulting from the procurement has been obtained.
24. After final contract is negotiated, approved and awarded, all proposal documents pertaining to this procurement will be open to the public, except for the material which is proprietary or confidential. The Procurement Department will not disclose or make public any pages of an offer on which the Offeror has stamped or imprinted “proprietary” or “confidential”, subject to the following requirements.

Proprietary or confidential data shall be readily separable from the offer in order to facilitate eventual public inspection of the non-confidential portion of the offer. Confidential data is normally restricted to confidential financial information concerning the Offeror’s organization and data that qualifies as trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7 NMSA 1978.

The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information.

25. Where a brand-name or equal specification is used in a solicitation, the use of a brand name is for the purpose of describing the standard of quality, performance and characteristics desired, and is not intended to limit or restrict competition. If a vendor proposes an “equal” to scope of work/specifications, APS reserves the right to refuse any or all proposals and is the sole interpreter of the scope of work/specifications and sole judge as to whether the “equal” proposed complies with the scope of work/specifications.
26. The District reserves the right to multi award contracts as necessary for adequate delivery or service in accordance with 13-1-153 NMSA.
27. The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Proposer to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any potential Proposer who is not a responsible Offeror, or who fails to submit a responsive offer, as defined in NMSA 1978 13-1-83 and 13-1-85.

## **TERMS AND CONDITIONS**

1. **TERM:** APS reserves to right to procure the services/goods as described in this RFP and enter into a contract as described on RFP cover page.
2. **NON-APPROPRIATION:** The District’s obligation to make payment under the terms of this RFP is contingent upon its appropriation of sufficient funds to make those payments. If the District does not appropriate funds for the continuation of this procurement, this procurement will terminate upon written notice of that effect to the Contractor. The District determination that sufficient funds have not been appropriated is firm, binding and not subject to review.
3. **PROCUREMENT CODE:** The Procurement Code, Sections 13-1-28 through 13-1-199 NMSA 1978, imposes civil and misdemeanor criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.
4. **TERMINATION:** Either party may terminate this contract as follows:
  - A. Termination by the Contractor
    1. The contractor may terminate this contract only if Albuquerque Public School District fails to comply with any provisions of this contract and after receiving notice of the noncompliance, the District fails to cure the noncompliance within ten (10) days, or
    2. By written mutual agreement between the Contractor and the District.
  - B. Termination by the District
    1. For Cause
      - a. The occurrence of either one of the following events will justify termination for cause:

- i. Contractor’s persistent failure to perform the work in accordance with the contract documents (including but not limited to, failure to supply sufficient skilled workers or suitable materials or equipment).
  - ii. Contractor’s violation in any substantial way of any provisions of this contract.
- b. If either one of the events identified above occur, the District may, after giving Contractor (and the surety, if any) ten (10) days written notice, terminate the service of Contractor, exclude Contractor from site, and take possession of the work. Contractor shall be paid for project costs incurred up to the date of termination but shall not be paid for loss of profits resulting from such termination.
- c. Where Contractor’s services have been so terminated by the District, the termination will not affect any rights or remedies of District against contractor then existing or which may thereafter accrue. Any retention or payment of moneys due the Contractor by the District will not release the Contractor from liability.

2. For Convenience

- a. Upon ten (10) days written notice to contractor, APS may without cause and without prejudice to any other right or remedy of APS, elect to terminate the contract.
- b. In such case, Contractor shall be paid (without duplication of any items):
  - i. for completed and acceptable work executed in accordance with the contract documents prior to the effective date of termination,
  - ii. for expenses sustained prior to the effective date of termination in performing services and furnishing labor, materials or equipment as required by the contract document in connection with uncompleted work.
- c. Contractor shall not be paid on account of loss of anticipated profits or revenue or other economic loss arising out of or resulting from such termination.

5. INDEMNIFICATION: The Proposer shall be responsible for damage to persons or property that occurs as a result of his fault or negligence, or that of any of his employees, agents or subcontractors. He shall save and hold harmless Albuquerque Public Schools against any and all loss, cost, damage, claims, expense or liability in connection with the performance of the contract. Any equipment or facilities damaged by the Proposer’s operation shall be repaired and/or restored to their original condition at the Proposer’s expense.

6. INSURANCE (If Applicable): The successful proposer shall purchase and maintain statutory limits of Worker's Compensation, Public Liability and Automobile Liability insurance approved by APS at the time of contract award. Albuquerque Public Schools shall be included as a loss payee and/or additional insured. Public Liability and Automobile Liability insurance shall include at least the following coverage:

General Liability Insurance – per occurrence	\$2,000,000
General Aggregate - \$1,000,000	
Product/completed operations aggregate \$1,000,000	
Bodily injury, per occurrence	\$1,000,000

Medical and medically-related expenses	\$5,000
Vehicle bodily injury, each occurrence, excluding medical and medically related expenses	\$750,000
Property Damage, per occurrence	\$1,000,000

Contractor shall furnish Owner with certificates of insurance with the contract documents and prior to the commencement of work.

**NOTE: Certificate holder shall be:** Board of Education  
Albuquerque Public Schools

**Certificate of Insurance forwarded to:** Albuquerque Public Schools – Procurement Department  
P.O. Box 25704  
Albuquerque, New Mexico 87125

7. **AUDIT:** The District reserves the right to audit the contractor’s records associated with this contract at any time during the contract period and for a period of up to three years following the expiration or termination of the agreement. Such audit may be conducted by District personnel or a third party under contract with the District. The District shall give the contractor reasonable notice prior to the conduct of any audit and upon receiving the notice from the District the contractor agrees to fully cooperate with the auditors. If contractor subcontracts any portion of its obligation to another party, contractor shall guarantee District’s access to books and records of such party.
8. **INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor performing services for the District. The Contractor shall not accrue leave, retirement, insurance, or any other benefits afforded to employees of the District as a result of this procurement.
9. **PROCUREMENT UNDER EXISTING CONTRACTS:** In accordance with NMSA 13-1-129, proposers are hereby notified that other governmental entities within the State of New Mexico, or as otherwise allowed by their respective governing directives, may contract for services with the awarded proposer. Contractual engagements accomplished under this provision shall be solely between the awarded proposer and the contracting entity with no obligation by Albuquerque Public Schools
10. **DEBARMENT OR SUSPENSION:** A business (contractor, subcontractor or supplier) that has either been debarred or suspended pursuant to the requirements of 13-1-177 through 13-1-180, and 13-4-11 through 13-4-17 NMSA 1978 as amended, shall not be permitted to do business with the District and shall not be considered for award of the contract during the period for which it is debarred or suspended with the District.
11. **CONFLICT OF INTEREST:** By submitting a proposal, the proposer certifies that no relationship exists between the proposer and the District that interferes with fair competition or is a conflict of interest; and no relationship exists between such propose and another person or firm that constitutes a conflict of interest that is adverse to the District.



12. **NON-DISCLOSURE:** The proposer shall not disclose any information relating to students, and employees of APS other than such information that may be authorized by the individual student or employee. Vendor agrees to indemnify and hold harmless APS from any damages, claims, liabilities, and costs including reasonable attorney fees in the event any unauthorized release of such information occurs.
13. **ASSIGNMENTS:** The awarded Contractor shall not assign nor delegate specific duties as part of this RFP nor transfer any interest nor assign any claims for money due or to become due under this RFP without the written consent of APS.
14. **PAYMENT:** Any invoice received and payment made shall be subject to District's terms and conditions (NET 30) unless specifically waived by District in a separate written document and not this RFP or any response.

## **PROTESTS**

1. Any Offeror who is aggrieved in connection with a solicitation or award of an Agreement may protest to the Purchasing Office in accordance with the requirements of the Contracting Procurement Regulations and the State Procurement Code. The protest should be made in writing within 24 hours after the facts or occurrences giving rise thereto, but in no case later than 15 calendar days after the facts or occurrences giving rise thereto (13-1-172 NMSA 1978). The protest must be in writing and delivered to the Executive Director – Procurement Department, Albuquerque, New Mexico.
2. In the event of a timely protest under this section, the Purchasing Agent and the Contracting Agency shall not proceed further with the procurement unless the Purchasing Agent makes a determination that the award of Agreement is necessary to protect substantial interests of the Contracting Agency (13-1-173 NMSA 1978).
3. The Purchasing Agent or his designee shall have the authority to take any action reasonably necessary to resolve a protest of an aggrieved Offeror concerning a procurement. This authority shall be exercised in accordance with adopted regulations, but shall not include the authority to award money damages or attorneys' fees (13-1-174 NMSA 1978).
4. The Purchasing Agent or his designee shall promptly issue a determination relating to the protest. The determination shall:
  - A. State the reasons for the action taken; and
  - B. Inform the protestant of the right to judicial review of the determination pursuant to 13-1-183 NMSA 1978.
5. A copy of the determination issued under 13-1-175 NMSA 1978 shall immediately be mailed to the protestant and other Offerors involved in the procurement (13-1-176 NMSA 19).

## **RFP SCHEDULE**

The RFP Buyer will make every effort to adhere to the RFP Schedule as noted on front cover page of this RFP. The schedule is subject to change by addendum. The evaluation committee *may* interview the Proposer(s) of the top rated proposals; however, contracts may be awarded without such interviews and

based solely on written offers. Finalists will be contacted to schedule interviews, if required. If an interview is requested, evaluation scores will be re-scored to reflect written response and interview response.

## **OVERVIEW**

Albuquerque Public Schools is the largest school district in New Mexico and one of the nation's largest school districts, covers more than 1,230 square mile geographical area. Currently, the district has 13 high schools, 12 schools of choice, 29 middle schools, 88 elementary schools plus 25 APS authorized Charter schools. APS has approximately 84,000 students and 14,000 employees. An elected Board of Education composed of seven members serving staggered terms of four years each governs the District. The Superintendent is Raquel Reedy.

## **PROJECT OVERVIEW**

This is a request for professional services to migrate the current Infor v10x in a single tenet environment to the Infor CloudSuite v10x for Albuquerque Public Schools. This is to include the upgrade of all Infor v10x application components to Infor v10x in the Infor CloudSuite.

### **1.0 IMPLEMENTATION PARTNER QUALIFICATIONS**

Albuquerque Public Schools is the largest school district in New Mexico that requires a top implementation partner to successfully complete this initiative. The successful selected offer must have the following characteristics.

- A long and successful track record in Infor Lawson CloudSuite implementations.
- Experienced with the Infor Public Sector Financials, Procurement and Supply Chain products.
- Experience in the K-12 Public Sector space.
- An Infor CloudSuite Certified Partner.

### **2.0 PROJECT SCOPE**

Infor shall provide a CloudSuite environment for Albuquerque Public Schools to migrate to. The services partner will lead the preparation of the new CloudSuite environment including set up, configurations, migration of reports, interfaces, integrations, customizations and extensions matching the current single tenet Infor Cloud environment. Where current system modified components are not congruent with Infor CloudSuite customization guidelines, the services partner will recommend and build with alternative tools and/or approaches that are allowed by Infor.

#### **License Software Scope Assumptions**

Unless otherwise noted, a single centralized environment/instance will be implemented for Albuquerque Public Schools, using single common configuration and business processes.

For all applications listed in the attached schedule of applications and modules, each will be upgraded with the latest generally available Infor software version at the time of the software delivery.

Infor advises Albuquerque Public Schools that the destination CloudSuite environment will be upgraded in tandem with upgrades in the current Albuquerque Public Schools cloud environment they are migrating from. We anticipate that at the time of the migration to the Infor CloudSuite, there will be no noticeable change in the end user experience.

#### **2.1 Upgrade Activities and Deliverables Scope**

Deliverables expected during the course of the project are as follows. These will be prepared jointly by the implementation partner and the Albuquerque Public Schools project manager.

1. Project Charter

2. Project Risk Workpaper
3. Project Plan
4. Communication Plan
5. Environment Planning Memorandum
6. Project Plan (Microsoft Project)
7. Desktop Planning Memorandum
8. Project Go Live Cutover Plan
9. Lessons Learned Workpaper

Services to be provided by Infor and the services partner:

Migration and upgrade of all Albuquerque Public Schools Infor v10x ERP products including LTM currently licensed to the v10x supported in the Infor Cloud Suite including configuration for reports, interfaces, process flows and application extensions, and move the environment to the Infor CloudSuite environment.

## **2.2 Organizational and Geographic Scope**

As provided herein, the parties anticipate that services will be performed for Albuquerque Public Schools at their locations in Albuquerque, New Mexico or remotely.

## **2.3 Current and Future State Assessment Scope**

Albuquerque Public Schools wants the implementation partner to complete a current state assessment of all primary areas that use the Infor systems including Finance, Human Resources, Payroll and Supply Chain. This assessment should compare current operations with best practice of the Infor product suite and make the appropriate recommendations to an improved future state. Recommendations from this review should also be divided into three categories for Albuquerque Public Schools to manage.

1. Simple procedural changes that can be implemented immediately.
2. Changes that require professional and/or technical guidance with up to 40 hours of effort.
3. Significant consulting beyond one week of service.

## **2.4 Interface/Integration Scope**

The current production environment of Infor at Albuquerque Public Schools has a significant number of interfaces and integration with other systems within and outside of the organization. These interfaces will have to be migrated to the v10x Infor CloudSuite environment using best practice to eliminate any prohibited customizations, use of proprietary executables and other means to run the jobs. Best practice is intended to include IPA or other Infor standard utilities delivered with the product.

“Interfaces” means those objects that allow data to move either into or out of the installed applications, either in batch, real-time or near real-time. Interfaces are defined by the business processes they facilitate, the points during those process where data is exchanged, the frequency in which data is exchanged, and the method by which the data is exchanged.

Interface Assumptions

- Albuquerque Public School’s IT staff has a high degree of dedication to current operations.
- The implementation partner will have to plan and budget to take responsibility for all migration development and unit testing.
- Integration testing will be performed by and will be the responsibility of Albuquerque Public Schools.
- All Integration and Interfaces are documented in the “RICE” report.

## **2.5 Customizations Scope**

The current production environment of Infor at Albuquerque Public Schools has a significant number of customizations. These customizations will have to be migrated to the v10x Infor CloudSuite environment using best practice to eliminate any prohibited customizations, use of proprietary executables and screen changes. Best practice is intended to include proper screen renaming techniques, use of Design Studio or other Infor standard utilities delivered with the product. Before the project begins, Albuquerque Public Schools will be reviewing customizations to determine those that can be retired.

### **Customization Assumptions**

- Albuquerque Public School's IT staff has a high degree of dedication to current operations.
- The implementation partner will have to plan and budget to take responsibility for all migration development and unit testing.
- Integration testing will be performed by and will be the responsibility of Albuquerque Public Schools.
- All customizations that are migrated to the CloudSuite environment will have to be approved by Infor.
- All customizations are documented in the "RICE" report.

## **2.6 Custom Tables Scope**

The current production environment of Infor at Albuquerque Public Schools has a number of custom tables. These custom tables will have to be migrated to the v10x Infor CloudSuite environment using best practice to eliminate any prohibited customizations. Prior to the beginning of the project, Albuquerque Public Schools will review the custom tables currently in use and identify candidate tables that can be eliminated. The implementation partner will be expected to also review the custom table list to determine any that can be eliminated.

### **Customization Assumptions**

- Albuquerque Public School's IT staff has a high degree of dedication to current operations.
- The implementation partner will have to plan and budget to take responsibility for all migration development and unit testing.
- Integration testing will be performed by and will be the responsibility of Albuquerque Public Schools.
- All custom tables that are migrated to the CloudSuite environment will have to be approved by Infor.
- All custom tables are documented in the "RICE" report.

## **2.7 Reports Scope**

The current production environment of Infor at Albuquerque Public Schools has a significant number of reports written in Crystal 2008 and managed via LBI. Most of these reports (259) will have to be migrated to the v10x Infor CloudSuite environment, converting the current reports from Crystal 2008 to 2013/2016. There are also COBOL reports (126). Also, the current reports are pointed to an Oracle DB. In CloudSuite, the reports will have to be pointed to SQL. Before the project begins, Albuquerque Public Schools will be reviewing reports to determine those that can be retired.

### **Reports Assumptions**

- Albuquerque Public School's IT staff has high degree of dedication to current operations.
- The implementation partner will have to plan and budget to take responsibility for all report development and unit testing.

- Final review and acceptance testing will be performed by and will be the responsibility of Albuquerque Public Schools. This includes user testing and data validation.
- All reports are documented in the “RICE” report.

## **2.8 Extensions and Modifications Scope**

The current production environment of Infor at Albuquerque Public Schools has a number of extensions, including third party products by companies that partner with Infor.

“Extensions and Modifications” refer to the modification of delivered Infor objects, or the creation of new objects that extend functionality.

- Albuquerque Public School’s IT staff has high degree of dedication to current operations.
- The implementation partner will have to plan and budget to take responsibility for all extension migration, development and unit testing.
- Final review and acceptance testing will be performed by and will be the responsibility of Albuquerque Public Schools.
- All extensions are documented in the “RICE” report.

## **2.9 Infor Process Automation (IPA)**

Albuquerque Public Schools has deployed the IPA tool as a solution in a limited fashion. The total number of production IPA is one. There will likely be an opportunity to address many customizations and interfaces in the migration to CloudSuite with IPA. In anticipation of this, Albuquerque Public Schools is investing in IPA training this summer. In addition, it is anticipated that the IT staff will be employed to assist in IPA development and testing when feasible, but should not be included in the budget for IPA development.

## **2.10 Business Process and Report Management Scope**

The implementation partner and Infor will upgrade (if needed) the Infor v10x Infor Process Automation (IPA) with the support of Albuquerque Public Schools.

Albuquerque Public Schools will require guidance in re-entry of current v10 LBI Dashboards to v10 in CloudSuite

In addition to the report customization work detailed above in the RICE report, Albuquerque Public Schools will require guidance and support on the upgrade of the v10 reports, dashboards and smart notes. Albuquerque Public Schools does not use Smart Notifications.

## **2.12 Security Configurations**

1. The Implementation Partner will work closely with the security staff at Albuquerque Public Schools in the configuration and rebuild of security service accounts required for the process flows and integrations in the new CloudSuite production environment.

## **2.13 Additional Scope Related Assumptions**

- Albuquerque Public School’s IT staff has high degree of dedication to current operations.
- The transition from the current Infor cloud to CloudSuite will require minimal end user training except for system access and new URL’s for possible implementation of Mingle.
- Albuquerque Public Schools will have an on-site project manager for purposes of project coordination with the project manager of the implementation partner.
- Infor will stand up the environment for v10x IPA with the Albuquerque Public Schools subscription license.

- The implementation partner will provide application assistance in testing and knowledge transfer of Infor v10x differences. Albuquerque Public Schools and implementation partner will mutually agree to work tasks before implementation partner work is initiated.
- Albuquerque Public Schools, the implementation partner and Infor will coordinate installation of the software prior to the start of each server upgrade.
- It is assumed that the CloudSuite “production” environment will be the development environment until cutover. At cutover, both the production and development environment will be available.
- Albuquerque Public Schools is one of the largest school systems in the United States with 15,000 employees

## **2.14 Go Live Scope**

Go live support is the work required to complete the cutover. “Go Live” is defined as the first time Albuquerque Public Schools uses the Licensed Software to process data in Albuquerque Public Schools live production environment in CloudSuite.

- Go Live Cutover Plan – A cutover plan shall be prepared by the implementation partner and Albuquerque Public Schools project managers. This plan will include all coordinated countdown activities from a month before go live until after go live including the first pay period pay day and the first accounting month end.
- Go Live Event – The weekend cutover activity where the legacy environment is closed down, copied and data restored in the new production environment in the Infor CloudSuite.
- Post Go Live Support – The support required to help Albuquerque Public Schools address any cutover issues, system issues and challenging mission critical business operations requiring assistance. On site and remote support will be part of the post go live strategy. The post go-live budget should include on-site payroll support during the week of the first live payroll after go live.

## **2.15 Training Scope**

### Technical Training

Albuquerque Public Schools will require the following technical training provided on site in Albuquerque, New Mexico:

### Design Studio Development

Infor Lawson/Landmark Security Architecture

Migrating 4GL customizations to Infor Cloud

Infor Lawson/Landmark System Administration

Any other classes recommended by the implementation partner will be considered. An IPA class will likely be scheduled outside of this proposal before start of the project

### Train the Trainer

End user training will be conducted by lead subject matter experts at Albuquerque Public Schools (Supply Chain, Accounts Payable, Accounting/Finance, Payroll and Human Resources). The implementation partner will conduct any required training of the subject matter experts.

**EVALUATION CRITERIA**

Proposals must address each of the following criteria. Each proposal may be awarded points up to the numeric value listed. Points will be awarded in compliance with NMSA 13-1-21 for New Mexico In-State Resident Business and Resident Veteran Business. If proposal is a Joint Venture, Offeror shall state in submitted proposal the percentage of work that will be performed by Resident Business and/or Resident Veteran Business. Please Note: An Offeror cannot be awarded both a resident preference and a resident veteran business preference. Offerors shall include in their proposal a copy of certificate issued by State of New Mexico Taxation & Revenue.

**\*\*\*The Offeror should contact Buyer for clarification of evaluation criteria or terminology\*\*\***

	Possible Points	Points This RFP
<p><b>Qualifications:</b> Submit a detailed narrative, describing your qualifications providing cloud suite migration services in a K-12 school setting. Include documentation that your company is an Infor CloudSuite Certified Partner. Include any information that will document the offeror’s has demonstrated competence, credibility and responsiveness in providing such services in the past and can be reasonably expected to perform in a like manner in the future.</p>	20	
<p><b>Experience and References</b> Submit detailed information that demonstrates your long and successful track record in Infor Lawson CloudSuite implementations, experienced with the Infor Public Sector Financials, Procurement and Supply Chain products.and experience in the K-12 Public Sector space. Include information on previously completed similar contracts with other entities and include contact name, email and phone number.</p>	20	
<p><b>Assigned Personnel:</b> Submit resumes for the assigned personnel that will directly be providing services to APS. Include their roles and responsibilities for this project.</p>	15	
<p><b>Methodology and Timeline:</b> Submit a detailed narrative of your company’s approach to this project, including detailed phases and timelines. Offeror should include the proposed contract document.</p>	20	
<p><b>Price Consideration and Proposed Contract:</b> Offeror should submit a detailed price proposal that provides hourly rates and estimated time for each phase of project.</p>	25	
<p><b>Total Possible Points</b></p>	<b>100</b>	
<p><b>New Mexico Resident Business Preference:</b> Five percent of the total possible points to a resident business. Offeror shall include a copy of their In-State Certificate issued by State of New Mexico Taxation &amp; Revenue Department.</p>	5	
<p><b>Veteran New Mexico Resident Business Preference:</b> Ten percent of the total possible points to a resident veteran business. To qualify an Offeror must include a copy of their Resident Veteran Certificate issued by State of New Mexico Taxation &amp; Revenue Department, and NM Tax &amp; Revenue documentation of annual business revenue.</p> <ul style="list-style-type: none"> <li>• 10 points for Resident Veteran Business/Contractor with annual revenues of \$3 million or less as verified by State of NM Tax &amp; Revenue.</li> </ul>	10	
<p><b>Total Possible Awarded Points</b></p>	<b>100-110</b>	

**Note: FAILURE** to adequately address and meet the above requirements may be cause for the proposal to be deemed non-responsive by the Buyer.

## **SUBMITTAL REQUIREMENTS**

**(For ease of evaluation, Proposals should be formatted in the order as listed below)**

The Offeror is particularly encouraged to address all points that will be evaluated as described herein, in each point of the evaluation criteria. If a factor of evaluation is not adequately responded to by the Offeror, the Offeror may be determined to be non-responsive.

**Your response shall not exceed 65 (sixty five) single sided pages.** The page limit does not include: front and back cover, Table of Contents, any required attachments, and blank dividers.

**Proposal shall include:**

1. **Letter of Transmittal Form**
2. **Qualifications**
3. **Experience and References**
4. **Assigned Personnel**
5. **Methodology and Timeline**
6. **Price Considerations**
7. **Attachments: All documents should be signed:** Campaign Contribution Form, Conflict of Interest and Debarment/Suspension Certification Form, Statement of Confidentiality Form, **Acknowledgement of Addendums**, Copy of New Mexico Resident or Veteran Resident Certificate.



**LETTER OF TRANSMITTAL FORM – Submit with your proposal**

Item #1 to 4 EACH **MUST BE RESPONDED TO**, Failure to respond to all four items **WILL RESULT IN THE DISQUALIFICATION OF THE PROPOSAL.**

1. Identity (Name) and Mailing Address of the submitting organization:


2. For the Person authorized by the organization to contractually obligate the organization:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

3. For the person authorized to negotiate the contract on behalf of the organization:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

4. For the person to be contacted for clarifications:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

- On behalf of the submitting organization named in Item #1, above, I accept the Terms and Conditions Governing the Procurement.
  
- I acknowledge receipt of any and all amendments of this RFP.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## **PROPOSAL SUBMITTAL REQUIREMENTS AND CHECKLIST**

Please submit your completed proposal, including the following items.\* Note that the requested information is mandatory and **failure to submit these items with your response may deem it non-responsive and may be disqualified.**

- Letter of transmittal, **SIGNED**
- Cost Proposal**
- Completed Conflict of Interest and Debarment/Suspension Form, **SIGNED**
- Campaign Contributions Disclosure Form, **SIGNED**
- Resident Contractor (or Veteran Resident Contractor) Preference Certificate – if applicable
- Addendums (if applicable) – **before** submitting your proposal, please check for addendums here:  
<http://www.aps.edu/procurement/current-bids-and-rfps>
  
- The following RFP information must be clearly labeled on the **outer envelope of your sealed proposal.**  
**Please note: If you put your sealed proposal inside a FedEx, UPS, etc. envelope, all of this information must also be written and visible on the outermost envelope** of your sealed proposal:
  - Offeror's Business Name** (not an individual's name)
  - Bid Number & Title:
  - Opening Date & Time:
  - Proper Delivery Address (see cover page)

*\* If items are not completed as required, your proposal may be deemed non-responsive.*

## CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

**THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.**

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to federal, statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

**“Family member”** means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

**“Pendency of the procurement process”** means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“**Person**” means any corporation, partnership, individual, joint venture, association or any other private legal entity.

“**Prospective contractor**” means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

“**Representative of a prospective contractor**” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

**DISCLOSURE OF CONTRIBUTIONS:**

Contribution Made By: \_\_\_\_\_

Relation to Prospective Contractor: \_\_\_\_\_

Name of Applicable Public Official: \_\_\_\_\_

Date Contribution(s) Made: \_\_\_\_\_

Amount(s) of Contribution(s): \_\_\_\_\_

Nature of Contribution(s): \_\_\_\_\_

Purpose of Contribution(s); \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

– **OR** –

**NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE** to an applicable public official by me, a family member or representative.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

\_\_\_\_\_  
Offeror Business Name

**CONFLICT OF INTEREST AND  
DEBARMENT/SUSPENSION CERTIFICATION FORM**

As utilized herein, the term "Vendor" shall mean that entity submitting a proposal to Albuquerque Public Schools in response to the above referenced request for proposals.

**The authorized Person, Firm and/or Corporation states that to the best of his/her belief and knowledge:** No employee or board member of Albuquerque Public Schools (or close relative), with the exception of the person(s) identified below, has a direct or indirect financial interest in the Vendor or in the proposed transaction. Vendor neither employs, nor is negotiating to employ, any Albuquerque Public Schools employee, board member or close relative, with the exception of the person(s) identified below. Vendor did not participate, directly or indirectly, in the preparation of specifications upon which the quote or offer is made. If the Vendor is a New Mexico State Legislator or if a New Mexico State Legislator holds a controlling interest in Vendor, please identify the legislator: \_\_\_\_\_ List below the name(s) of any Albuquerque Public Schools employee, board member or close relative who now or within the preceding 12 months (1) works for the Vendor; (2) has an ownership interest in the Vendor (other than as an owner of less than 1% of Vendor's stock, if Vendor is a publicly traded corporation); (3) is a partner, officer, director, trustee or consultant to the Vendor; (4) has received grant, travel, honoraria or other similar support from Vendor; or (5) has a right to receive royalties from the vendor. \_\_\_\_\_

**DEBARMENT/SUSPENSION STATUS**

The Vendor certifies that it is not suspended, debarred or ineligible from entering into contracts with the Federal Government, or any State agency or local public body, or in receipt of a notice or proposed debarment from any Federal or State agency or local public body. The vendor agrees to provide immediate notice to Albuquerque Public School's Procurement Department in the event of being suspended, debarred or declared ineligible by any department or agency of the Federal government, or any agency of local public body of the State of New Mexico, or upon receipt of a notice of proposed debarment that is received after the submission of the quote or offer but prior to the award of the purchase order or contract.

**CERTIFICATION**

The undersigned hereby certifies that he/she has read the above CONFLICT OF INTEREST and DEBARMENT/SUSPENSION status requirements and that he/she understands and will comply with these requirements. The undersigned further certifies that they have the authority to certify compliance for the vendor named and that the information contained in this document is true and accurate to the best of their knowledge.

**Signature:** \_\_\_\_\_

**Name of Person Signing (typed or printed):** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Name of Company (typed or printed):** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

**ALBUQUERQUE PUBLIC SCHOOLS  
TERMS AND CONDITIONS  
STATEMENT OF CONFIDENTIALITY**

The undersigned employee of/subcontractor to \_\_\_\_\_, hereinafter referred to as "Offeror" and/or "Contractor", agrees, during the RFP process, and during the term of the Contract between Contractor and the Albuquerque Public Schools (APS) and forever thereafter, to keep confidential all information and material provided by APS or otherwise acquired by the employee/subcontractor, excepting only such information as is already known to the public, and including any such information and material relating to Attachments of this RFP, and relating to any client, vendor, or other party transacting business with APS, and not to release, use or disclose the same except with the prior written permission of APS. This obligation shall survive the termination or cancellation of the Contract between Contractor and APS or of the undersigned's employment or affiliation with Contractor, even if occasioned by Contractor's breach or wrongful termination.

The undersigned recognizes that the disclosure of information may give rise to irreparable injury to APS, a client or customer of APS, or to the owner of such information, inadequately compensable in damages and that, accordingly, APS or such other party may seek and obtain injunctive relief against the breach or threatened breach of the within undertakings, in addition to any other legal remedies which may be available. The undersigned acknowledges that he or she may be personally subject to civil and/or criminal proceedings for such breach or threatened breach.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Offeror Business Name

\_\_\_\_\_  
Date