Request for Proposal
for

Enterprise Resource Planning (ERP) Software and Implementation

Issued by:

The City of Highland Park

Proposals must be submitted
No later than TIME 4:30 PM (CDT) September 19, 2018 to:

The City of Highland Park
Attn: Jon O'Connell
Highland Park City Hall
1707 St. Johns Ave
Highland Park, Illinois 60035

LATE PROPOSALS WILL BE REJECTED
Proposals will not be opened publicly.

For further information regarding this
RFP contact: Jon O'Connell
Email: JOConnell@cityhpil.com

Issued: August 20, 2018

Request for Proposal (RFP)

Schedule of Events

August 20, 2018	RFP issued
September 4, 2018	Intent to Respond and Questions from Proposers due Submit Intent to Respond and Questions to: Jon O'Connell Email: JOConnell@cityhpil.com Proposers who intend to respond to this RFP must submit an e-mail with all contact information to the e-mail address listed above. All questions must be submitted in writing via e-mail. Responses will not be issued for questions submitted after the September 4th deadline. Responses to questions will be issued via addendum(s) to all Proposers who have submitted an Intent to Respond.
September 10, 2018	Addendum issued (if required) via e-mail to all Proposers who have notified the City of their Intent to Respond
September 19, 2018	DUE DATE FOR PROPOSALS Proposals shall be opened at 1707 St, Johns Ave Highland Park, Illinois 60035 by 4:30 PM (CDT). LATE PROPOSALS WILL BE REJECTED.
October 8, 2018	City will notify selected Proposers of its decision to move forward with product demonstrations.
October 22, 2018- November 9, 2018	Proposer demonstrations Note that in addition to conducting scripted demonstrations, proposers are expected to provide a lab environment where City staff can experience the proposed system in a test environment. Proposers are expected to provide all equipment and hardware required for the lab environment.

Method of submittal: Written proposals must be in a sealed envelope and clearly marked in the lower left hand corner: "Sealed Proposal - ERP Software and Implementation". Proposals must be received by 4:30 pm (CDT), local time, on September 19, 2018. Three paper copies of the proposal must be submitted. In addition, one electronic copy of the proposal and any supporting documentation in PDF format (Attachments B, C & D should be submitted in Excel) must be submitted on a USB flash drive. Proposals submitted by telephone, facsimile or electronic transmission will not be accepted. Proposers accept all risks of late delivery of mailed proposals, regardless of fault. Proposals arriving after the deadline will be returned unopened and will not be considered.

Submit Proposals to:

City of Highland Park
Attn: Jon O'Connell
1707 St. Johns Ave
Highland Park, Illinois 60035

Although every effort will be made to follow this schedule, the City reserves the right to modify the dates as necessary and to accommodate special circumstances. Any such revision will be formalized by the issuance of an addendum to the RFP. All Proposals are due by the time specified. Any Proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. The City reserves the right to amend the RFP at any time and the amended RFP will be posted and proposer's who have submitted an Intent to Respond will be notified of the amended RFP.

Table of Contents

1.0 Information and Instructions 6
1.1 General Information/Project Overview 6
1.2 Definitions 6
1.3 About the City of Highland Park 6
1.4 About this Project 7
1.5 Five to Ten Year Vision for the City of Highland Park Administrative Applications 9
1.6 Business Context & Assessment Summary 9
1.7 Current Environment 18
1.8 Potential Interfaces 18
1.9 Data Conversion 20
1.10 Technical Environment 21
1.11 Current Functional Statistics 23
1.12 Warranty 24
2.0 Preparing and Submitting a Proposal 25
2.1 General Instructions 25
2.2 Proprietary Information 25
2.3 Eligibility 25
2.4 Required Elements of Proposals 25
2.5 Background Material 26
2.6 Executive Summary – Proposal Section 1.0 26
2.7 Scope of Services – Proposal Section 2.0 27
2.8 Company Background – Proposal Section 3.0 28
2.9 Proposed Application Software & Computing Environment –Proposal Section 4.0 29
2.10 Responses to Functional/Technical Requirements – Proposal Section 5.0 32
2.11 Implementation Plan – Proposal Section 6.0 32
2.12 Training Plan – Proposal Section 7.0 34
2.13 Maintenance and Support Program – Proposal Section 8.0 35
2.14 City of Highland Park Specific Issues to be Addressed by Proposal Section 9.0 36
2.15 Client References – Proposal Section 10.0 37
2.16 Exceptions to the RFP – Proposal Section 11.0 37
2.17 Sample Documents – Proposal Section 12.0 37
2.18 Price Proposal – Proposal Section 13.0 38
3.0 PROPOSAL SELECTION AND AWARD PROCESS 39
3.1 Evaluation and Selection 39
3.2 Verbal Presentations – Scripted Software Demonstrations 39
3.3 Site Visits with Government Users in Live Environment 39
4.0 GENERAL TERMS AND CONDITIONS 40
4.1 Termination of RFP 40
4.2 Final Selection 40
4.3 Execution of Agreement 40
4.4 Clarification 40
4.5 Withdrawal of Proposal 40
4.6 Agreement 40
4.7 Offers Only 40
4.8 Acceptance/Rejection 40
4.9 Retention of Proposals 40
Attachment A – RFP Submittal Checklist 41
Attachment B – Software Reference Form 42

Attachment C - Requirements Matrix 43
Attachment D – Price Proposal 44
Attachment E – Benefit Tables 45

1.0 Information and Instructions

1.1 General Information/Project Overview

The City of Highland Park, Illinois ("City") is seeking proposals from qualified Proposers to provide Enterprise Resource Planning (ERP) software and implementation services. The general scope for this procurement includes financial management, human resources/payroll, utility billing, time and attendance, community development and miscellaneous City operations software. Submittal of a proposal does not create any right or expectation to a contract with the City.

The City has hired Baker Tilly Virchow Krause, LLP to facilitate the selection process. Baker Tilly Virchow Krause, LLP will play no role in the selection of the finalist Proposer; an internal City project team is overseeing the entire selection process and will make recommendations for selection.

1.2 Definitions

A. Shall – The term "shall" denotes mandatory requirements.

B. Must – The term "must" denotes mandatory requirements.

C. May – The term "may" denotes an advisory or permissible action.

D. Should – The term "should" denotes a desirable action.

E. Contractor – A Proposer who contracts with the City.

F. City – City of Highland Park

G. Discussions- For the purposes of this RFP, a formal, structured means of conducting written or verbal communications/presentations with responsible Proposers who submit proposals in response to this RFP.

H. RFP – Request for Proposal.

I. Proposer – Person or entity responding to this RFP.

J. Agreement – A contract between the Contractor and the City.

K. Evaluation Committee – Committee established for the purposes of evaluating proposals submitted in response to this RFP.

1.3 About the City of Highland Park

The City of Highland Park, incorporated in 1869, has a long-standing heritage as one of the prestigious communities within Chicagoland's Lake Michigan's North Shore. The City occupies a land area of 12.25 square miles, located 26 miles north of Chicago, and serves a population of 29,902. The City automatically became a home-rule unit of government when the 1970 Illinois Constitution was adopted because it had a population in excess of 25,000.The adopted annual operating and capital budget for FY18 is $90,565,000.

The City operates under a council-manager form of government. Policy-making and legislative authority are vested in a seven-member Council composed of a mayor and six council members elected on an at-large basis for four year, staggered terms. The City Council appoints the City Manager. The City Manager is responsible for carrying out the policies and ordinances of the City Council, for overseeing the day-to-day operations of the City, and for appointing the directors of the City's six departments (City Manager's Office, Community Development, Finance, Fire, Police and Public Works).

1.4 About this Project

In 2018, the City began efforts to re-evaluate how its human resource, financial, payroll information and other data is managed across the organization. The City's adopted annual budget for FY18 includes the employ of 278 full-time equivalent employees in its six operating departments. This project focuses on the administrative functions affecting the staff in all of these occupations.

The City uses the Tyler Eden system to support many of its financial and operational activities. Modules used include Building Permits, Cash Receipts, Fixed Assets, Accounting/Budgeting, Accounts Receivable and Accounts Payable, Utility Billing, Payroll/Human Resources, Licensing, Customer Request, Purchasing, Code Enforcement, Project Accounting and Parcel Management

In addition to Eden, the City utilizes multiple supporting systems to manage public safety operations, work orders and inventory and citizen requests for service. More significantly, the City relies on numerous, more manual, non-integrated systems (Excel, paper, Access databases), to supplement limited functionality within primary systems, or completely replace functionality not provided by a primary system.

The City seeks to implement a "vanilla" software package and to limit the amount of modification to the base application. It also requests that the selection process minimize impact to ongoing operations. The City is looking for the best solution which can provide both the breadth and depth for these functional areas. One of the factors most critical to the City is finding a solution that provides comprehensive integration across modules. For example, the City needs parcel data which is effectively integrated across ALL system modules. Ensuring consistency of data records is one of the core reasons for undertaking this project. Proposers should use the minimum functional requirements provided in Attachment C for more detail regarding intended scope. The scope for this procurement is summarized in the following figure.

Financials and City Operations	
General Ledger/Budget Control	Budget Development and Management
Accounts Payable	Accounts Receivable and Cashiering
Purchasing	Fixed Assets
Project/Grant Accounting	Utility Billing
Work Orders	Inventory
Financial Reporting	Parcel Management
Customer Relationship Management	Electronic Document Management
Real Estate Transfer Taxes	Vehicle Stickers
Human Resources/Payroll	
Personnel Administration	Benefits Administration
Payroll	Time and Attendance/Advanced Scheduling
Applicant Tracking	Position Control
Employee Self-Service	Manager Self-Service
Community Development	
Code Enforcement	Business Licensing
Permits and Inspections	Code Compliance Adjudication

The following serves as the basic motivations for replacing the current financial system are as follows:

- **Current systems do not fully support business needs.** In many of the functional areas, staff have been required to develop systems of workarounds to produce desired results. For example, community development has been forced to rely on multiple paper applications and approvals for permits and licenses.

- **System requires multiple entry points to maintain information.** Modules are not fully integrated, requiring staff to enter data into multiple modules instead of a single source of information (e.g. update parcel information in both the utility billing and community development modules). The redundant efforts are an inefficient use of time and increase the opportunity for data entry error.

- **Network of systems required to manage City business is too complex.** Because the core system, Tyler Eden, does not meet all of the City's information needs, staff have developed Excel spreadsheets and Access databases to address the need to complete work in a given area. For example, Finance maintains two lists of capital assets. One list is maintained in an Access database for annual audits while the other list is maintained in an Excel spreadsheet for insurance tracking. This complexity creates issues with data integrity and results in substantial amounts of reconciliation between multiple data sources, decreasing the efficiency of the City's process.

- **Lack of electronic human resource records.** Currently, the master personnel records are paper-based. The City does not have an automated system for dealing with human capital issues. As a result, it is challenging for the City to track and analyze human capital data to drive strategic thinking.

- **Lack of standardized and user driven report writing.** Most report writing at the City relies on separate spreadsheets or modification of system-generated reports. User-driven reporting on Eden is difficult and often does not relay all needed information. As a result, City staff is forced to rely on other systems to track data or to manipulate data, thereby exposing the City to increased risks of human error. Features such as user-driven reporting and dashboards would provide managers with ownership of the data and allow them to drive issues related to what the data is indicating.

- **Electronic capabilities maximizing administrative efficiencies are missing.** Electronic features, such as online service requests or invoicing, do not exist in Eden and as a result, City staff must manually enter work orders received or invoices received into the system. Furthermore, Eden has many limitations, such as the inability to close out licensing batches at the community development level without also closing licenses at the City Manager's office, create complications in executing processes.

- **The system is not intuitive or user friendly.** While the current ERP system meets many basic functional needs, it does not have an intuitive, user-friendly interface. Therefore, training new employees required a longer onboarding time.

1.5 Five to Ten Year Vision for the City of Highland Park Administrative Applications

The City's long-term vision for the City's HR, financial and peripheral systems is to maximize its data management capabilities. The City desires to increase business efficiencies, reduce its dependency on paper, and use interfaces between systems in order to create a single, integrated system focused on the delivery of real-time data. The City's primary need is to move from a transaction-focused environment to an environment that allows the City to utilize its data for analytical purposes. Typically, when business processes are dependent upon paper and multiple, unconnected systems, the focus is on completing a transaction and not on the information itself or how it can be used to improve business operations. Staff should be able to focus more on data analysis and making data informed decisions if the City can remove the focus on the process. The City's long-term vision is based on the following:

- Employee and Manager Self Service
- Data Driven Decision Making
- Mobile Computing
- Data Progression
- Online Options and Transparency
- Data Reliability and Increasing Accountability
- Knowledge Management
- Customer Support & Training
- GIS system integration across modules

1.6 Business Context & Assessment Summary

The City conducted an Assessment of its strengths, weaknesses and business needs as part of an effort to determine the scope of future system functionality. The following sections describe the limitations of the current environment and provide an overview of the future business needs.

General Ledger (GL)/Budget Control

Business Needs

1. Establish budget control parameters
2. Ability to electronically print posting logs in any module
3. Ability to flag items to exclude from reports
4. Recall and ability to access posted reports
5. Ability to schedule out monthly journals for a year
6. Notifications for out of balance postings
7. Escalation of out of balance notification for additional review
8. Function that shows unposted balance in expenditure reports.
9. Ability to extract G/L account detail in Excel
10. Control mechanisms that provide notifications before they close if they are out of balance
11. Mechanisms that lock worksheets to prevent work being overwritten
12. Ability to clearly identify assets and liabilities as part of the GL account string
13. Ability to easily query account codes
14. Out of balance posting
15. Real time fund balances
16. Enhanced user-friendly reporting capabilities to support CAFR, GASB, Year End and Council reporting
17. User driven and intuitive reporting
18. Drill down capabilities in order to see the documentation behind a particular transaction, within a single screen
19. Ability to add comments and notes to journal transactions
20. Enhanced GL account string management: validation at account creation and entry and "quick-key" or drop-down menus at entry
21. Automation of monthly reconciliation preparation and review

Budget Development and Management

Business Needs

1. Ability to recall reports (i.e. reprint a report that was just run)
2. Easy budget editing capability and review
3. Comment box for budget justifications
4. The ability for Finance to set up budget parameters prior to pushing the budget documents out to departments
5. Ability to easily combine or extract combined budget documents in file formats such as PDF
6. Budget estimates within the system that include detail on line items
7. Automated email notifications when budgets have been accepted or approved in the system
8. Tracking of budget adjustments with justifications The ability to maintain multiple “sandbox” versions of a budget in the system until a final budget is selected for approval
9. Ability to track and maintain contractual changes on personnel budget
10. Robust CIP, personnel, planning, and debt planning budgeting functionality which would include the ability to tie projects to multiple funds throughout the budgeting process and monitor the availability of funds to complete projects (i.e. if throughout the budgeting process, a project was cancelled, the funds dedicated to that project should be made available to fund other potential projects that were previously unfunded).
11. Forecasting and budget scenario capabilities
12. Ability to conduct budgeting entirely within the system, without the need for separate Word and Excel spreadsheets
13. Ability to make budget adjustments in Excel and upload them to the system as a budget scenario, if desired
14. User-friendly, department driven reporting
15. Ability to see line item detail, multiple fiscal year actuals, and trend line data
16. Comprehensive budget document creation and editing capabilities with the ability to make mass changes to formatting components of the budget document (i.e. font ,color changes, text, charts, and tables)

Accounts Payable

Business Needs

1. Stronger alerts and warnings
2. Ability to process multiple payments against a single invoice as multiple departments may need to pay on single invoice
3. Track contract pay outs
4. Identify duplicate erroneous payments based on more than just the invoice date and vendor
5. Customizable email notification frequency
6. Payment approval routing
7. The application of credit to blanket PO’s
8. Detailed and user friendly expenditure report
9. Detailed workflow
10. Three way matching
11. Ability to support ACH payments
12. Electronic receiving of invoices from vendors
13. Clean vendor list
14. Associate multiple addresses to a vendor account
15. If the Accounts Payable module is being used to process employee reimbursements, the ability to protect sensitive information related to any payments made

Accounts Receivable and Cashiering

Business Needs

1. Ability to customize point-of-sale items by cashier/department
2. Ability to bill employees on leave for health insurances benefits
3. Barcode scanning of invoices
4. Decentralized invoicing
5. Decentralized payment
    a. User driven payment
    b. Self service
    c. Credit cards, ACH, etc.
    d. Mobile
6. Master customer records where residents can pay multiple bills at once.
7. Ability to disclude bad debt from current debt reports.
8. Ability to make certain information private on invoices (i.e. ability to mask certain information when billing employees for insurance benefits while on medical leave)
9. Mobile payment functionality to enhance processing times during busy seasons (i.e. vehicle stickers)
10. Ease of use in account query to see detail on recent transactions and drill down to history of past transactions

Purchasing

Business Needs

1. The ability to see account balances when typing G/L numbers
2. Confidential field on requisitions for Human Resources purposes
3. Short and long description field capabilities
4. Auto-population of information
5. The ability to copy blanket and regular purchase orders from the previous year for convenience without rolling forward balances
6. Ability to make vendors inactive and removed from lists
7. Track vendor and contractor performance
8. Link multiple addresses and history to specific vendor
9. Create PO's for future fiscal years
10. Ability to copy requisitions
11. Ability to drill down by department, credit card, vendor, to identify what has been spent
12. Obtain ad-hoc reports broken down by vendor, date, and budget item
13. Customized input screens based on user preferences
14. Dashboard for contract management
15. Time-based workflow escalation
16. Enhanced ability to manage vendor file, including: notating a vendor as preferred, tracking vendor performance and flagging vendors with poor performance, flagging duplicate vendors at entry and ability to deactivate vendors
17. Ability to track contractor licensing and certification as well as expiration dates
18. Enhanced and user-friendly reporting
19. Automatic purge of files at retention date (i.e. supporting quote documentation)
20. Ability to attach supporting documentation within the system (i.e. invoices, quotations, etc.)
21. Enhanced workflow, tracking, reporting for change orders

Fixed Assets

Business Needs

1. Single, central source of information on capitalizable (and other) assets and the location of these assets
2. Need to track critical information related to the asset (condition, warranty, useful life, etc.) in a single repository
3. Access to asset data for risk management purposes
4. Single policy for managing assets, including those falling below the capitalization threshold. Departments should be educated on this policy
5. Printable list of assets to do physical inventory checks, sortable by location
6. Ability to develop fixed asset aging and replacement reports for purposes of forecasting and capital budgeting

Project/Grant Accounting

Business Needs

1. Utilize project ledger from a budgeting perspective
2. Single inventory of grants
3. Ability to track project retainage within the financial system
4. Ability to create fixed asset shells at milestone or full project completion
5. Single and automated method for tracking grants/projects
6. Dashboard to review grant/project budget
7. Management of grants across fiscal years
8. Improved tracking of time to grants and projects including integrated time management

Inventory Management

Business Needs

1. Inventory module integrated with the work order, fixed assets, purchasing and HR modules of a larger ERP system
2. City-wide inventory policy, tracking, and management process
3. Contract management
4. Flag performance issues on an inventory item record
5. Mobile access
6. The creation of separate “warehouses” within the inventory module so that PACE inventory could be segregated from sewer inventory which could be segregated from streets inventory, etc.
7. Automatic notification of low stock items and reorder points
8. Use of barcoding or tagging system
9. Demand history reports
10. Minimum and maximum review
11. Improved tracking of bulk items (sand, salt, etc.)
12. Ability to designate inventory items as ‘Critical’ (i.e., must have on hand at all times)

Human Resources

Business Needs

1. Electronic personnel files – management of human capital
2. Position control and budgeting (FTE count, vacancy listing, etc.) which accommodates the complexity of the City's classification and compensation system
3. Reduced dependency on Excel and paper forms
4. Integration with systems (online application module)
5. Free up staff time to be more strategic in human capital management
6. More automation for reduced reconciliation time
7. Customizable reports
8. Employee self-service
9. Learning and performance management
10. FMLA tracking
11. Security features, field level security

Payroll

Business Needs

1. More intelligent reporting and analysis
2. Integration with electronic Personnel Action Requests/Forms (PAR/PAF)
3. Benefits tables with two tiered wellness discounts (percentage based) capable of maintaining a large number of combinations
4. Ability to convert sick leave to flex spending hours, 457 plans, incentive hours or payout
5. Payout rate calculation based on average of employee pay rates across the City
6. Ability to effective date employee start dates for payroll purposes

Time and Attendance

Business Needs

1. Ability for Public Works to track time by increments multiple time increments (down to 3 minutes)
2. User driven time reporting with workflow to supervisors for review (daily, weekly, bi-weekly)
3. Elimination of paper time sheets and data redundancies
4. Quick keying for time entry
5. Ad-hoc reporting capability
6. Overtime budget reporting
7. Mobile time entry
8. Swipe card time entry
9. Reporting capabilities prior to payroll posting (entered but not posted)
10. Dashboard view of department standing (year-to date for compensatory time, OT, sick-leave, etc.)
11. Integration with the advanced scheduling and payroll modules

Advanced Scheduling

Business Needs

1. Ability to set minimum employee staffing levels that trigger hire-backs for Fire Department
2. Elimination of paper overtime sign-ups, leave requests, leave approvals
3. Integration with leave accrual banks to notify supervisors of employee leave ability
4. Separate scheduling views for employees and supervisors
5. Mobile access
6. Vacation approvals based upon first in, first approved as well as vacation bidding within the system
7. Consistent policy for leave approval
8. Analytical tools for leave use history
9. Ad-hoc reporting capability
10. Dashboard view of department forecasting (year-to date for compensatory time, OT, sick-leave, etc.)
11. Integration with time keeping system

Work Orders

Business Needs

1. Integration with GIS
2. Cost reporting
3. Dashboards
4. Universal workorder platform
5. Alerts for field technicians when work is to be completed nearby
6. Single resident request portal
7. Reduction of data redundancies and paper
8. Prioritization of work orders and tasks
9. Automated scheduling of work orders
10. Categorization of work orders for tracking purposes
11. Work order status/expected completion date visibility
12. Link costs (staff time, materials, etc.) to work orders
13. Ability to bill based on work orders
14. Sort/filter work orders by location
15. Flag repeated work order requests linked to assets
16. Integration of work order system to inventory

Permitting and Code Enforcement

Business Needs

1. Mobile component
2. GIS and parcel database integration
3. Citizen portal for initiating code enforcement complaints which includes feedback on case status
4. Online inspection scheduling
5. Customer portal for submitting plan review and permit applications as well as plan review comments
6. Integration of code enforcement case management module with adjudication module/system
7. Flexible case/process management functionality to accommodate various plan review and permitting processes
8. Integration with cashiering for intake and tracking of fees
9. Robust reporting, dashboarding and system notifications

Code Compliance Adjudication

Business Needs

1. Classification of tickets as open, closed, continued or default
2. Due date and court dates assigned by the system
3. Ability to create and apply rules for when fines are applied
4. Ability to generate customized letters to notify recipients of hearings, open tickets and other actions
5. Integration with AR/Cashiering for intake and tracking of payments
6. The ability to designate a case as on hold for collections due to juvenile status

Business Licensing

Business Needs

1. Ability to take online payments for all departments
2. System that supports automated processes
3. Single system for all department needs
4. Ability to track expiration dates and status within the system
5. Integrated financial system with a single record for a customer (i.e., finance, utilities, inspections)
6. Automated checks to determine if other fees/taxes have been paid
7. Ability for the City to accept applications and payment online
8. Ability for applicants to schedule inspections online
9. Automated workflow for license approval
10. Formal reconciliation of records between disparate systems

Real Estate Transfers

Business Needs

1. Ability to track change of ownership by parcel
2. Integration with GIS, Community Development, Utility Billing and Finance modules
3. Ability to view all outstanding permitting and code fees
4. Ability to track exemption rationale if an exemption was applied

Utility Billing

Business Needs

1. Integration with Neptune AMR meters
2. Integration with GIS
3. Ability to combine billing of multiple meters at one location onto one bill
4. Ability to separate billing of multiple meters at one location onto distinct bills
5. Final meter read tracking in the system
6. Regular billing and off-cycle final billing
7. Automatic recognition for when a deposit should be reimbursed or applied to remaining account
8. Code temporarily vacant/vacant/snow bird accounts so they do not appear on the variance report
9. Ability to generate invoices outside of standard billing cycle
10. Standardize final bills to one billing cycle
11. User-friendly online payment system with a shopping cart (account search and payment identified by address, select payment date, schedule payments in advance, etc.)
12. Web based work order request tracker
13. Data inventory system
14. Ability to set criteria for delinquent account shut-offs then generate the report
15. Standardized letters generated by the system (NSF, payment plan, canceled credit card, etc.)
16. Read only mode to allow multiple people to access an account
17. Payment plan calculation and tracking within the system
18. Automatic application of late fees (set dollar value or percentage) based upon City defined time limits.

Electronic Document Management and FOIA

Business Needs

1. Searchable fields
2. Redacting of sensitive information based upon user security levels
3. Audit trails for document changes
4. Mass purge capability based upon date for document retention compliance
5. Online FOIA request accessibility
6. City defined request categories
7. Page for the City to store frequently requested items (in a sortable format by date posted, request category, relevant department)
8. Standardized position based workflow routes dependent on request categories
9. Ad-hoc internal routing capability
10. Non-linear workflow capability to allow multiple departments to concurrently contribute to completing the request
11. Out-of-office routing settings to forward FOIA requests to designated co-worker during user-defined dates and time periods
12. Auto escalation of FOIA request if a response has not been made within a user defined time
13. Ad-hoc reporting capability that includes the ability to:
    a. Track repeat requests
    b. Report on request categories
    c. Track time spent responding to requests
    d. History of requests received by individual requestors
14. Web-enabled document searching for citizens for documents such as ordinances and resolutions
15. Single sign on to the document management system
16. User-defined security systems within the ERP system should extend to documents stored within the system
17. A document management system which complies with all confidentiality requirements including HIPAA and CEGIS

Vehicle Stickers

Business Needs

1. Search of registered vehicles by parcel address to renew all vehicles with one payment
2. Integration with adjudication, Finance module and parcel management
3. Online payment option
4. Multiple vehicle sticker types
5. Bar code application tracking tied to vehicle data
6. Ability to prorate fees

1.7 Current Environment

While it is difficult for the City to identify the exact number of Users it will have using the ERP environment, Proposers shall utilize the following initial estimates for pricing purposes. The descriptions below are for reference purposes only and are provided as guidelines. They are not intended to be comprehensive, nor limiting.

Type of User	Description	Estimated Number Users
Professional Users	Entering and/or approving transactions in the system on a regular basis. May utilize the system for inquiry and standard reporting purposes (e.g., looking up account balances, invoice status, vendor payments, etc.) and advanced reporting (e.g., budget document, dashboards, etc.).	175
Power Users	Perform, approve, and/or update any transaction in the system	5
Advanced Users	Advanced reporting, dashboarding and transaction approval capabilities (i.e. may have ultimate approval authority within a specific module)	25
Self-Service Users	Will use the system to enter time and leave requests, update address and direct deposit information, and check leave balances.	225 (includes part-time and full-time employees)

It is highly likely that some users will fall into more than one of the categories defined above (i.e., neither the rows nor columns are intended to be additive in any way). For example, a professional user may also be a self-service user. The total number of users is likely to be close to 225. The estimates provided above are intended only to assist Proposers in proposing the correct number of various types of licenses.

1.8 Potential Interfaces

Proposers shall evaluate the following list of likely interfaces. If the Proposer agrees that it is unlikely that the functionality as described in the description column can be provided by the Proposer's software, the cost of an interface to these systems MUST be included in the cost of the proposal. If the interface cost does not include all of the following interfaces, Proposers must be very specific about which are not included and provide a detailed explanation of how that functionality will be performed.

Function	Purpose/Use	System/Platform	Nature of Interface
Fire Department	Fire inspection and record management.	Firehouse	Two Way
Accounts Receivable/Payable	Process electronic wire transfers, post to the GL and process receivable transactions.	City's Financial Institution	Two Way
General	Upload, access, and manage documentation.	Laserfiche	Two Way

Function	Purpose/Use	System/Platform	Nature of Interface
Fleet Management	Vehicle inventory tracking, shop floor, and work orders.	CFA Software	Two Way
Work Orders	Building maintenance work orders	FacilityDude	Two Way
Tree Inventory	Maintenance of tree inventory and tracking of work performed on trees	TreeKeeper	One Way
Human Resources	Add employee performance rating to employee records and provide access.	Performance Pro	One Way
Human Resources	Employee benefits selection	Benefit Solver (Gallagher)	One Way
Finance	Auto-post and update dashboards of the budget and actual statistics. Online payment capability.	City Website	Two Way
General	Asset tracking and parcel management.	GIS	Two Way
Human Resources	Hiring, employee records, testing, and onboarding.	NEOGOV	One Way
Advanced Scheduling	Police advanced scheduling	Schedule Anywhere	Two Way
Utility Billing	Online customer accounts and bill payment	Water Smart	Two Way
Utility Billing	Meter reading	Neptune	One Way
Parking tickets	Parking ticket issuance and fine tracking	Cardinal	Two Way
Plan Review	Plan review markup and tracking	Bluebeam Revu	Two Way

1.9 Data Conversion

Proposers shall assume that the City wishes to convert at least the following data to be used in any ERP solution. As part of Attachment D – Price Proposal, proposers shall fill out tab 3, specifying data conversion costs for each of the following.

Source System	Data Element	Minimum Conversion Requirements
Eden	General Ledger account balances and transaction data	Current, plus seven years historical
Eden	Budget history	Current, plus seven years historical
Eden	Payroll, HR, and Absence history	Current, plus five years historical
Eden	Vendor File	Active vendors
Eden	Accounts Payable history	Current, plus five years historical
Eden	Accounts Receivable	Open receivables
Eden	Purchase Orders and receiving history	All open and three years of history
Eden	Permitting and inspection data	Minimum: current plus 10 years of building permit and inspection history Desired: current plus 16 years of building permit and inspection history. Provide pricing for both
Eden	Utility billing customer records and account balances	Total active customer history plus five years historical
Eden	Meter inventory	Current
Excel	Fixed Assets	Current balances
Excel	Police Department permit data (film, block party, solicitor, and taxi license)	All current permits plus one year historical
Eden	Rental registration and contractor license data	Current plus three years historical
GIS	Complete parcel information	Full database import

Source System	Data Element	Minimum Conversion Requirements
GIS	Water and Sewer system asset information	Full database import
Firehouse	All fire permit and inspection data	All current permits plus two years historical
Access	Real estate transfer tax data	Current fiscal year plus five years historical
MSI	Vehicle sticker data	All current sticker data plus two years historical

1.10 Technical Environment

Current City technical environment is explained below:

Server Hardware	Dell 730xd
Virtualization	VMWare
Server Operating Systems	Windows Server 2008r2 and Server 2012
Mail Server	On Premise Exchange 2010
Web Server	Hosted by Revize LLC
Workstation	Dell OptiPlex 3020's * 3050's
Network	Aruba/HP ProCurve Switches connecting remote building via gb fiber
Database	SQL Server 2016
Office Applications	Microsoft Office Word, Excel, Access, PowerPoint
Report Writer	Crystal Reports & SQL
Backup and Recovery	Veeam Backup
Security	Symantec End Point Protection

Proposers shall take into consideration the following preferences when proposing an ERP solution:

Technical Function	Preferred Technology/Platform
Server Operating Systems	Windows Server 2016
Client Operating Systems	Windows 10
Database Software	SQL Server 2016
Web Browser	Internet Explorer, MS Edge, Chrome & Firefox
Mail Server Software	On Premise Exchange 2010/2016 Also support Office 365 cloud
Office Applications	Local Office 2013/2016 Professional Also support Office 365 cloud

The City prefers software that is standards-based and does not lock the City into proprietary technology. In addition, the City preference is for GUI-based applications running in a client-server or Web-based environment. Applications should be user-friendly and table-driven, and able to utilize the City's existing network.

The technology standards and preference information is provided for informational purposes only. Proposers are encouraged to recommend the optimal enterprise technology environment to support its proposed solution.

1.11 Current Functional Statistics

The following table contains information regarding the City's current operations by function. Proposers shall refer to these tables when responding to the business requirements and the Cost spreadsheets.

HR/Payroll:	
Number of Active Employees	244
General Ledger:	
Number of Funds	15 funds
Operating Budget:	
Operating Budget (includes Grants)	$54.0 Million (2018)
Capital Budget	$19.3 Million (2018)
Total Revenues	$85.2 Million (2018)
Total Expenditures	$90.6 Million (2018)
Budget Type	Line Item Budgeting
Fixed Assets:	
The City tracks the following types of assets:	Vehicles, Land, Machinery, Equipment, and Buildings
Business Licensing/Permitting/Inspections/Code Enforcement:	
Number of businesses registered	916 businesses registered including 55 new businesses
Number of inspections performed	Fire inspections- 4,262 Community Development-Building Inspections- 12,343
Utility Billing (Water Plant)	
Service area	60,000 customers regionally 23 square mile service area
Projects and Grants	
Total value of grants awarded	$1.9 Million

1.12 Warranty

The City desires the software and implementation services procured pursuant to this RFP to have a minimum warranty. The extent of the warranty coverage will be evaluated as part of the overall procurement process.

Software. The selected software Proposer must warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP. The selected Proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all modules/suites/applications included in the implementation.

Implementation Services Firm. The City also requires a warranty for the services (e.g., work products, developed modifications, and system configuration) for a minimum of 24 months after the final acceptance date (as will be defined during the negotiation process) of the respective modules.

2.0 Preparing and Submitting a Proposal

2.1 General Instructions

Proposal submittals should include three hard copies, and one electronic copy in PDF format on a flash drive, submitted to the following address:

City of Highland Park
Attn: Jon O'Connell
1707 St. Johns Avenue
Highland Park, IL 60035

Proposals are due on or before 4:30 PM (CDT) on September 19, 2018

Failure to submit three hard copies and one electronic copy in PDF format on a flash drive by the due date specified above will be deemed to be non-responsive and will result in disqualification from the RFP process. Specify "ERP Software Proposal" on the exterior of the envelope. Proposals will not be opened publicly. Proposals submitted after the due date and time will be returned unopened. No verbal, telephone, email, or fax proposals will be considered. A submittal checklist is provided as Attachment A to this RFP.

2.2 Proprietary Information

Under the Illinois Freedom of Information Act, all records in the possession of the Cityare presumed to be open to inspection or copying, unless a specific exception applies. 5 ILCS 140/1.2. One exemption is "[t]rade secrets and commercial or financial information obtained from a person or business where the trade secrets or commercial or financial information are furnished under a claim that they are proprietary, privileged or confidential, and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business, and only insofar as the claim directly applies to the records requested." 5 ILCS 140/7(1)(g). The City will assume that all information provided in a proposal is open to inspection or copying by the public unless clearly marked with the appropriate exception that applies under the Freedom of Information Act. The City FOIA Officer is the final authority on determining whether information in a proposal may be disclosed.

2.3 Eligibility

Proposers must demonstrate that they, or the principals assigned to the project, have successfully completed services, similar to those specified in the Scope of Services section of this RFP, to at least three agencies similar in size and complexity to the City of Highland Park to be eligible to respond to this RFP.

2.4 Required Elements of Proposals

Proposals shall provide a straightforward, concise delineation of the Proposer's capability to satisfy all of the elements and requirements of the RFP both in content and in sequence. Each proposal shall be submitted in the requested format and provide all pertinent information. One original copy of each proposal shall be signed in ink by a duly authorized officer of the company. A proposal will not be considered if it modifies or fails to conform to each of the requirements set forth in this Section. The proposal must conform to the outline below and contain all requested information in the same sequential order as outlined below. Proposals deviating from the proposal format and organization may be removed from further consideration.

Proposers must assemble their proposals in strict adherence to the layout requirements so that competing proposals can be equally and easily compared. Failure to follow all proposal layout requirements may result in disqualification. Each Proposer is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. The proposal shall be organized into the following major sections:

0.0 Introductory Material (Title Page, Letter of Transmittal, and Table of Contents)

1.0 Executive Summary

2.0 Scope of Services

3.0 Company Background (including most recent audited financial statements)

4.0 Proposed Application Software and Computing Environment

5.0 Responses to Functional/Technical Requirements (Attachment C)

6.0 Implementation Plan

7.0 Training Plan

8.0 Maintenance and Support Program

9.0 Essay Responses to the City of Highland Park Specific Issues

10.0 Client References (Attachment B)

11.0 Exceptions to the RFP

12.0 Sample Documents

13.0 Price Proposal (Attachment D)

2.5 Background Material

The Title Page must show the subject, name of the Proposer, address, telephone number, email address and the date. Letter of Transmittal, executed by an authorized representative, and Table of Contents must also be included.

2.6 Executive Summary – Proposal Section 1.0

This part of the response to the RFP should be limited to a brief narrative summarizing the proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel.

2.7 Scope of Services – Proposal Section 2.0

This section of the proposal should include a general discussion of the Proposer's overall understanding of the project and the scope of work proposed.

- List and describe all proposed modules. Proposer must explicitly state the software module name and versions that are proposed as part of this ERP solution. All modules shall be listed on Attachment D (Price Proposal) and included in the price proposal.
- Confirm that the proposed cost in reflective of the number of users the City has defined in Section 1.7. Describe the approach to licensing (i.e. site license versus per user). If licensing is based on user count, provide the tiers of users used to determine pricing.
- All functional requirements that are responded to with a positive response (anything except "NA") will be considered to be in scope. Proposal, including price and staffing requirements, must address all of these requirements.
- Proposers may indicate some modules as "optional." Optional modules shall not be included in the overall price proposal, however, prices for optional modules (including software license and implementation) should be provided. If a module required to fulfill some requirements is listed as optional, the appropriate response code is "NA." Proposers should then indicate in the comments column that module is available but optional.
- What are the proposed third-party applications? The Proposer shall explicitly state the name of any third-party products that are part of the proposed solution to the City or any third-party firms providing services for implementation, training, or other services. For each third-party product or service provider there shall be a statement about whether the Proposer's contract will/will not encompass the third-party product/service and/or whether the City will have to contract on its own for the product.
- The Proposer shall also provide written proof that it has approved access to the third-party software source code (owned or in escrow) and that the Proposer has the ability to provide long-term support for the third-party software components of its system.
- Proposers must include the price for any third-party products, including software license, hardware prices (if pertinent), maintenance, implementation, training, and any other related prices in the total price of the proposal. Third-party software included in the proposal must be included in any demonstration of functionality if the Proposer is invited to that phase of the evaluation.
- If third-party products or services are proposed, Proposers must complete Attachment B (References) for each third-party product or service that is proposed.
- Confirm the data conversions that have been proposed. The City expects Proposers to include all conversions listed in section 1.9 of the RFP.
- Confirm all interfaces that have been proposed. The City expects Proposers to include an interface to all systems listed in section 1.8. If Proposers do not include all interfaces, please provide an explanation.
- List all modifications/customizations/enhancements to the software that have been proposed as part of scope. Modifications listed here should accommodate all functional requirements in Attachment C listed as "MOD." If customizations are not part of scope, the correct response to the functional requirements should be "NA."

2.8 Company Background – Proposal Section 3.0

This section of the proposal should provide a general overview of the company responding to the RFP, including any subcontractors and/or third parties. Please provide the following information:

- **Prime Software Firm and Implementation Firm:** Please provide an overview of the Company(ies) (including sub-contractors) represented in this response. In the case of teamed responses, please reply to all questions for each company involved. In addition to the proposer's overview, please address the following items:
    - Describe the proposing company's(ies') structure(s) (corporation, partnership, or privately held).
    - Describe the number of years the company(ies) in this proposal have been in software and professional services.
    - State the location of the primary office(s) from which this engagement will be serviced and the range of activities performed at that office.
- **Prime Software Firm and Implementation Firm:** The proposer should include information with regard to the organization's resources that it deems advantageous to the successful provision of the requested products and services. This might include management capabilities and experience, technical resources, and operational resources not directly assigned to this project, but available if needed.
- **Shared History:** Provide a history of the previous work conducted individually and as a team by the software and implementation firms included in this proposal, including third party software providers and sub-contractors.
- **Financial Information:** For all companies proposed in this proposal (including sub-contractors), provide an overview of the company's Financial Stability in terms of the past year, three years, five years and finally 10 years. In addition to the proposer's overview please address the following items:
    - Audited Financial Statements for the last fiscal year available
    - Description of any litigation or pending litigation arising from any of the firms' performance in the last five years.
    - Description of any investigations of any of the proposing firms by State or Federal regulatory or law enforcement agencies in the last ten years.
    - Description of the amounts and types of professional liability insurance and the name of the carrier. Please provide a copy of the certificates of insurance.
- **Prime/Sub Relationship Structure and Project Resource Resumes:** Provide a detailed description of the prime/sub relationship structure being proposed for this project. Please provide a resume for each proposed team member for all implementation firms and subcontractors in the proposal. The City expects that key individuals will provide services on this project from start to finish, ensuring continuity and success. Elaborate on the Proposer's willingness and ability to maintain key personnel dedicated to the project, both in terms of reassignment within the organization and retaining them generally as employees. Additionally, if there is a change in key personnel on the project, the City requires approval of these changes. Further, any ramp up time and costs incurred due to transitioning personnel will not affect the project timeline nor the overall cost to the City.

- **Subcontractor Information:** The Proposer shall list any subcontractor's name, address and state of incorporation that are proposed to be used in providing the required products and services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, the subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Proposer of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal.

2.9 Proposed Application Software & Computing Environment –Proposal Section 4.0

The Proposer must present, in detail, features and capabilities of the proposed application software. In addition to the description, answers to the following questions must be provided in succinct narrative form (at least one paragraph per item):

Application Overview

- Provide the name of the proposed system(s), modules within each system, middleware, current version(s), and release date(s). Identify each system as core software or third party software.
- Describe the Web functionality of the proposed systems, both current capabilities and future direction.
- Identify the programming language for each module of the proposed systems including the report writer(s). Additionally identify any programming languages that are proprietary.
- Describe in detail the proposed database platform(s) for the proposed solution.
- Describe the system technical architecture (i.e. multi-tiered, thin client, web-based, etc.)
- Describe the integration of the proposed system modules. Identify any modules that are not fully integrated.
- Describe in detail the proposed IT technical development toolset solution for this proposal.
- Describe how the solution would be performance tested.
- Describe how the solution would perform during peak periods (e.g., benefits enrollment).
- Will the proposer's firm commit to transaction response times? If so, what is the proposer's stated commitment?
- Describe the monitoring tools to be used and how alerts from the monitoring of various components of the solution (e.g., physical infrastructure operating systems, integration services, and applications) would be managed and integrated for root-cause analysis of incidents and problems.

Technology Overview

The City's IT Department is intending to procure any required hardware for the project through existing procurement contracts. Therefore, it is critical that the proposer include detailed specifications and recommendations for hardware sizing appropriate to the requirements for the City. The City's IT Department will develop the hardware estimate for the Cost Proposal based upon the representations provided by the proposer(s).

Describe in detail the proposed hardware environment solution for this proposal. Include the following items:

- Describe the hardware required for the City to support the scope of software proposed within the RFP response:
    - Server recommendations/requirements (including detailed specifications) for all components of the solution (database, application, web, third-party, printing, etc.)
- Explain the approach to sizing of the hardware environment.
- Describe how the proposer will take responsibility for approving the sizing of the hardware infrastructure given the City intends to procure the hardware.
- Describe the number of environments recommended for the City to maintain both pre-implementation and post-implementation and the purpose of each environment. (At a minimum, the City would like to maintain two environments: one live and one for testing.)

- Describe the recommended workstation configuration including any and all user peripherals (including detailed specifications).
- Discuss the proposer's flexibility in supporting different types of platforms including the Microsoft Surface platform. How is the proposer adapting to rapidly changing technology?

Network Environment

Describe in detail the proposed network environment solution for this proposal. Include the following items:

- Describe the preferred physical architecture for the proposer's solution. Also include documentation on the conceptual and preferred technologies the proposer's solution uses.
- Describe the proposer's architecture roadmap for upcoming and future releases.
- Describe the overall networking and connectivity solution that will be necessary to provide access to the ERP, including from the following locations outside the City network:
    - Employees using wireless devices in the field (e.g., handheld devices or laptop computers).
    - Employees working from home, a hotel or other locations where a City network connection is not available.
    - Other locations.
- Describe the specifications of the network and connectivity infrastructure required to support the ERP solution.
- Describe the assumptions around network bandwidth required for each desktop workstation.
- Describe the proposer's recommended and ideal environment for the City.

Document Management Tools

Describe in detail the proposed workflow tools solution for this proposal. Include the following items:

- Describe how the proposer's solution enables document storage and retrieval so that source documents can be tracked within the system.

Workflow Management Tools

Describe in detail the proposed workflow tools solution for this proposal. Include the following items:

- Describe how the proposer's solution enables workflow management both within the solution and integrating with other tools.
- Describe specifically which modules of the proposer's software support the standard workflow tools.
- Describe specifically which modules of the proposer's software do not support workflow.

Reporting and Data Warehousing

<u>Report Writing Tools</u>: Describe in detail the proposed report writing tools solution for this proposal. Include the following items:

- Describe the recommended solution's reporting capabilities (dashboards, scorecards, shared reports, event triggered reporting, report versioning, and job scheduling).
    - Describe how user created templates can be shared in a user community.
- Describe the reporting application architecture and how it relates to the back-end infrastructure. Differentiate between any architecture components (Independent data marts, Bus Architecture, Hub and Spoke, Centralized or Federated).
    - Describe the impact using the report writer will have on the production environment.
    - Describe whether you do/do not recommend running reports against mirrored databases.
- Describe in depth any analytical reporting capabilities within the product(s).
- Describe and differentiate between embedded/on-line transactional reporting against any analytical reporting.
- Describe in detail any third party proposer reporting engines embedded within the product(s).

    - Describe any Architecture or Reporting Licenses you have with third parties.
- Describe how metadata is created, administered/maintained and shared in terms of business, technical, application, and process metadata.
- Describe any performance concerns in using the report writing tools.
- Describe the following information analysis and reporting tools provided by the proposed system:
    - Standard on-screen inquiries
    - On-screen print screen capabilities for screens, inquiries and reports
    - Query tools
    - Report writer
- Describe how the product(s) create value at an organization level from the perspective of business intelligence and meeting strategic directives.
- Describe how the proposer's solution enables business intelligence both with the solution and integrating with other tools. Please list any other tools to which the proposer's solution has been successfully integrated.
- Identify any reporting limitations for producing reports on data contained within the database via the proposed toolsets.

Data Warehouse/Data Mart: Describe in detail any proposed data warehouse/data mart solution for this proposal. Include the following items:

- Describe if the software product or specific module being proposed in the solution includes data warehouse / data mart reporting functionality.
- If the proposer's proposed solution includes such functionality, explain the features, functionality, data model, extract/load capabilities, and reporting available.

ERP Application Security

Describe in detail the proposed solution's security tools and capabilities for this proposal. Include the following items:

- Describe the recommended solution's approach to role based security.
- Describe in detail the proposer's proposed single sign on and Active Directory solution for this proposal. Include the following items:
    - Describe in detail how the product(s) support single sign-on.
    - Describe in detail how the product(s) support active directory.
- Describe in detail how the proposer's proposed solution would protect the privacy of information designated as private or confidential such as social security numbers, credit card numbers, ACH transactions, information, and employee health information—which is processed or stored.
- Describe in detail the proposer's transaction log and audit trail capabilities including the data recorded and the tools used to view and report the information.
- Describe how electronic signatures are used within the application. Are they certificate or credential based?
- Describe the encryption technology used within the system.
- Explain any other differentiating security features within the solution.
- Explain why the proposer's solution is a best practice solution from a security standpoint.
- If the proposer's company is issued an SSAE16 report or equivalent, please include a copy of the most recent report in the response. If not, please explain why the proposer's company does not get an SSAE16 issued and describe the internal controls in place to protect against cybersecurity incidents and other risks.

2.10 Responses to Functional/Technical Requirements – Proposal Section 5.0

Responses to the requirements listed in the proposal. Proposers shall use the format provided and add explanatory details as necessary in a separate spreadsheet using the requirement number as a reference. The following answer key must be used when responding to the requirements.

Response to Functional Requirements			
F	Provided fully functional out of the box or with configuration (no custom development)	CR	Custom Report Development Required
MOD	Modification/Customization/Software Enhancement (Any custom development that will cost extra)	TP	Third-party Software Required to Fully Provide Requirement (Third-party Software Must be Proposed)
SR	Provided with Standard Report or Reporting Tool	NA	Not Included in the proposal

- Functional requirements represent functionality that is currently needed as well as functionality that is expected or is likely to be required in the future. **Failure to provide some requirements or excluding some requirements will not eliminate the Proposer from contention.** The City will evaluate the proposal as a whole including price/value comparisons when evaluating proposals.

- Proposers must use one code only per requirement. The spreadsheet is locked to enforce this. All requirement responses must be submitted in the format presented in the attached spreadsheet (Attachment C). The requirements responses submitted, including requirement responses, will become attached to the software license and implementation services contract. Proposers are expected to warrant all positive responses (every response except “NA”). For requirement responses, other than “NA,” Proposers must indicate the module or product that is required to meet the requirement.

- For requirement responses of “CR”, Proposers must provide estimated costs and projected time to complete the customization.

- All responses which are marked F, MOD, CR, SR, or TP must be included in the scope, cost proposal and staffing matrix submitted in the proposal. Furthermore, the module necessary to perform that functionality must be included in the scope and cost of the proposal.

- If a module is required for only a few functional requirements and it is not cost-efficient to include in the proposal, the Proposer should mark the requirement as “NA” and indicate accordingly in the comment field that this module is available but not being included in the proposal.

- If functionality is not available, but expected to be available in future versions of the software, the expected release date can be noted in the comments column.

2.11 Implementation Plan – Proposal Section 6.0

The City expects to provide staffing of 50% of the total implementation hours, but reserves the right to alter the mix upon further discussion with Proposers. Pricing should assume 50% implementation work effort by the City and 50% work effort by implementation consultants.

Implementation Methodology & Approach

Provide an overview of the implementation methodology, including a description of the approach including project initiation/planning, design, configuration, development, testing, training, conversion, and post go-live support. In addition to the overview please address the following items:

- Describe how the implementation plan has been designed in such a way to minimize any negative impacts on existing City operations and responsibilities.
- Describe how the implementation plan has been designed to provide for the deployment and use of management, supervisory or other key personnel during the project. (The detailed plan below should show all management, supervisory and key personnel that will be assigned to manage, supervise and monitor the project.)
- Describe how the implementation plan has been designed in such a way to minimize the startup time of the project.
- Describe specific actions the City could take to support an accelerated start-up. Describe how the implementation plan makes use of subcontractor(s), if any, on this project.
- Describe how the implementation work plan will be maintained and updated throughout the course of the project.
- Describe the Proposer's experiences with organizations that have successfully prepared for, implemented and supported the solution. Additionally, for each experience describe what items/actions led to the organization being prepared.
- Describe experiences with organizations that have not been successful or have struggled in preparing for, implementing and supporting the solution. Additionally, for each experience describe what items/actions caused the failure or struggle, and how you would recommend the City prepare to ensure success.

Implementation Work Plan & Deliverables

Please provide a detailed work plan for each phase of the implementation. The work plan section should include the following:

- **Phases and Major activities**
  - Description of each phase (e.g. system design, modification, installation, implementation, technical training, user training, and acceptance).
  - Description of major activities within each phase showing all significant tasks required for successful completion of the Phase objectives.
- **Detailed timeline** (by Gantt, Pert or other chart)
  - Timeline details for all phases indicating the start dates, end dates and milestones.
  - Timeline details for all major activities indicating the start dates, end dates and milestones.
  - Timeline details for all deliverables indicating the start dates, end dates and milestones.
- **Resource allocations**
  - Identification of hours by resource (City, Proposer and any sub-contractors) for all phases.
  - Identification of hours by resource (City, Proposer and any sub-contractors) for all major activities.
- **Deliverables**
  - Comprehensive inventory of project deliverables by phase.
  - Detailed description of all deliverables (e.g. process documentation, interface specification, etc.)
  - Identification of major dependencies for each deliverable.
  - Detail the deliverable acceptance period for each deliverable.
  - Provide samples of all major deliverables proposed.

Implementation Project Team

Please provide a detailed description of the project organization strategy for the proposed work plan. As part of the description, please address the following items:

- Detailed description of the team structure and roles for all firms involved (including sub-contractors) and the City.
- Detailed description of the responsibilities for each role defined in the team structure for all firms involved (including sub-contractors) and the City.
- Detailed description of the number of personnel and the estimated hours for all firms involved (including sub-contractors) and the City.

Project Management

Describe in detail the proposed project management approach for the proposal. Include the following items:

- Describe what status reporting and frequency of communication will be proposed for the City.
- Describe the project coordination, documentation, and communication tools you will provide for the project (e.g. SharePoint)
- Describe the approach that will be used to manage scope and changes during the course of the project.
- Describe the approach that will be used to assess go-live readiness.

Testing Approach

Describe in detail the proposed testing approach for the proposal. Include the following items:

- Describe the different aspects of testing included within the approach (e.g. unit, integration, security, parallel, system, stress, performance, regression, etc.).
- Describe the testing environment recommended for testing.
- Describe the user acceptance testing recommended.

2.12 Training Plan – Proposal Section 7.0

The Proposer must provide a detailed plan for training. This information MUST include:

- Describe how a training environment would be created and maintained.
- Describe the proposed approach to training for this project (i.e. on site at the City vs. at Proposer facilities, train the trainer vs. train all users), training materials, and methodologies. Please include all software (including third party products) proposed in the proposal. **This should be the SPECIFIC approach to training that was included in the cost proposal, not just the general training options you offer.**
- Identify whether there is instructor-led, classroom training available.
- Identify whether there is computer-based training available. If so, identify what is included in the proposal.
- Identify what other tools are optionally available for the City.
- Provide a list of the courses proposed, with the course name, description, and hours.
- Describe in detail how training regarding the operation and use of the ERP will be delivered to each subset of the end-user community, and what tools and materials will be employed.
- Describe the time commitment required of each group of trainees.
- Describe whether or not custom training materials will be provided by the Proposer based upon the City's configurations, modifications and process decisions during the implementation. If custom training material is not recommended to be provided by the Proposer (i.e. the City is responsible for custom training materials), please estimate the cost for the Proposer to create the custom training materials.
- Describe the technical training and knowledge transfer approach to IT personnel to support the ERP hardware, if necessary.
- Describe the proposed methodology and approach for ongoing training. Address the procedures for training new users and for delivering refresher training to existing users.

- Identify whether the system includes a user reference manual and a technical reference manual.
- Identify whether the technical reference manual includes descriptions and diagrams of the relational database structure, tables, and elements within the database. Please provide a sample of description and diagram the relational database structure, tables, and elements within the database.
- Identify whether all manuals are available in electronic format.
- Identify whether all manuals are updated with each new release of software.
- Identify whether online help is provided.
- Identify whether online tutorials are provided.
- Describe whether and how the help feature can be called from the specific transaction being processed (field-sensitive help).
- Provide a sample training plan relevant to this implementation.
- Describe the benefits and risks to the proposed training strategy.

2.13 Maintenance and Support Program – Proposal Section 8.0

The proposal must specify the nature of any post-implementation and on-going support provided by the Proposer including:

- Describe the maintenance and support package you are proposing to the City.
    - Fully describe terms and conditions of the annual software maintenance agreements.
    - Please include a copy of the standard agreement.
    - Note if the maintenance and support package differs for any of the proposed software solutions, including third-party solutions
- Describe why this is the best option for the City.
    - Describe the ongoing support services provided, including hours of operation, procedures, and problem escalation measures available.
    - Describe the ratio of customers to support personnel.
    - Describe the customer support locations and hours of operation in terms of CST.
    - Describe the committed support time for support questions.
    - Describe the average response time for support questions.
    - Describe the range of response time for support questions.
    - Describe a typical customer support call based on an application error.
    - Describe a typical customer support call based on a data error (interface not working, data not replicating).
    - Describe a typical customer support call based on a report not working properly or displaying incorrect data.
    - Describe the follow-up process with a client after resolution of a help desk call.
    - Identify whether the support is available seven (7) days a week, 24 hours a day. If so, identify the cost above your recommended support.
    - Describe your support staffs ability to "log in" to the customer system for certain types of support. Explain the process and the security supporting the process.
    - Identify whether onsite support is available if needed. Describe how onsite support costs are handled.
    - Describe the available web-based support options.
    - Describe any web-based reporting tools available to review open/pending support issues.
- Describe the Proposer's approach to recruiting and retaining quality support staff. What are the training requirements of support staff?
- Describe the other maintenance and support packages available to the City that are not proposed (including Helpdesk type support)

2.14 City of Highland Park Specific Issues to be Addressed by Proposal Section 9.0

The City has some unique questions or business process needs that it would like addressed as part of all proposals. Proposers are required to answer these questions with as much detailed information as possible. Proposers are strongly encouraged to make sure the response answers the questions and is not comprised of marketing material.

1. Does the ERP require a GIS Server plugin like a Server Object Extension (SOE)?
2. Currently the City provides a form to employees to complete to indicate what they would like to do with their sick time, flex, deferred comp, incentive time, or HP-21. This physical election form is completed by the employee and returned to the City. Human Resources representatives then check the elections made on these forms against City records and update leave balance banks on a spreadsheet and in the employee record.
    a. Does the ERP system have the capability to create and collect the election form electronically?
    b. Does the system have the capability to create customized forms based on employee time banks and include updated time bank information?
3. In regards to Laserfiche, how would the document integration work between the proposed ERP system and the City's system? How will security settings for Laserfiche be pulled over to the proposed ERP system?
4. The City's Water Production team informs customers of any changes or device information through a letter. In order to properly notify new residents, address changes are communicated through an address card which is updated in an Excel spreadsheet and Cross Track. Once new owner information is updated they generate a letter for the resident.
    a. Is your ERP system capable of automating this process of address/owner updates?
    b. If parcels have any device relevant to the Water Production Department (i.e. a backflow prevention device), is your ERP system able to track/flag these parcels when ownership changes to create a letter to notify the new resident?
5. The City is considering purchasing an activity registration system to support registrations and membership fee tracking at the Senior and Youth Center. The City would like this system to integrate with and ERP system. Based on your ERP systems capabilities please indicate which activity registration systems your ERP system has successfully integrated with?
6. One of the City's primary goals of the new ERP system is to have unified customer accounts across all City transactions. For example, if a customer pays a utility bill through Finance, purchases licenses through the City Manager's Office, has a code enforcement fine, and also applies for a building permit with community development, all of these transactions should be visible when completing an inquiry on the customer. Please discuss your system's ability to enable this functionality and how customer databases and address management would be handled across distinct system modules.
7. The City takes in developer deposits at the onset of development and zoning projects in the City. These deposits are booked as a liability at the time they are received. However, the City also uses the project accounting module and sets up a project number for each deposit/project and books expenses against this project as they occur. Throughout the project, if expenses exceed the original deposit, an invoice is issued to the developer. At the end of the project, a refund is issued for any balance remaining. At the end of the fiscal year, in order to reconcile the liability account and recognize revenue, journal entries are made to the liability account so that it accurately reflects any amount due to or from developers. While this process works, it creates some frustration because of the effort required to track developer deposits and then reconcile them to the liability account at year end. Is there any functionality in your system that would help address this?
8. What, if any, would the cost be to add a new legal entity to the general ledger after go-live (e.g. if the City began processing financial transactions for the school district or neighboring municipality).

9. Designated staff at the City have access to use credit cards to make purchases. These purchases are still added to the system as a requisition/PO and the vendor is listed as the City's bank, Chase, so that approved POs in the system can be tied back to the credit card statements at month end. However, this doesn't allow the City to track purchases made to the specific vendor, since the vendor is always listed as Chase, instead of the location where the purchase was actually made. Describe any functionality your system may have to track purchases made through a credit card while simultaneously tracking the vendor from which the purchase was actually made.
10. Generally, once forms have been created in the system (i.e. invoice templates, form letters, etc.) what is the process for making changes to those forms? Is it a process the City can complete on its own or must they contact the Proposer and incur a cost to make changes?
11. Should the City implement a utility billing module as well as a work order and inventory module, where should water distribution and treatment inventory (i.e. pipes, valves, etc.) be stored in the system, the utility billing inventory or the general work order inventory?
12. The City has a multitier benefits rate structure with over two hundred fifty (250) different possible employee contribution rates. Employee contribution rates are determined based upon plan choice, number of dependents covered, salary band and wellness program participation. Wellness program participation is based upon a point system and completion of required health screening and assessments. There are two separate rate contribution structures, one for members of the fire union and one for all other employees (See Attachment E). Please explain how/if the system is able to accommodate this structure, and note any recommended changes or questions.

2.15 Client References – Proposal Section 10.0

The City considers references for both the software and implementation services to be important in its decision to award a contract. Using the form provided in Attachment B, please provide three public sector client references for clients serviced in the past five years. At least one of the references should be similar in size to the City and have a similar implementation scope. Regional clients are preferred but the City understands this may be difficult and inability to provide regional references will not negatively impact the evaluation process. If the software proposer is different from the implementation firm, three references should be provided for each. Additionally, provide three references for any third-party software firms. All references should be for fully completed (live) installations, completed within the past five years.

Finally, in addition to the references, proposers must submit a list of Midwest clients currently using or implementing the software solutions proposed.

2.16 Exceptions to the RFP – Proposal Section 11.0

All requested information in this RFP must be supplied. Proposers may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section and a written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the City, and the description of the advantages or disadvantages to the City as a result of exceptions. The City, in its sole discretion, may reject any exceptions or specifications within the proposal.

2.17 Sample Documents – Proposal Section 12.0

Proposers shall include sample copies of the following documents. Although they are sample forms, the documents must contain all material terms so that the City can fairly evaluate the Proposer's forms.

- Sample software licensing agreement.
- Sample maintenance agreement.
- Sample implementation services agreement.
- Sample standard reports.
- Sample documentation (user guides, training materials, etc.).
- Sample implementation project plan.

2.18 Price Proposal – Proposal Section 13.0

Proposers shall submit price proposals according to the format provided in Attachment D to this RFP. The City reserves the right to contact Proposers on price and scope clarification at any time throughout the selection process and negotiation process.

It is important that Proposers use the format presented in this RFP. Attachment D shall include total price for all software, services, and additional costs to acquire all software and services referenced in the proposal including third party prices. If third party products or services are included, do not provide separate versions of Attachment D (Costs) for each third-party product.

Do **NOT** use “To Be Determined” or similar annotations in the cells for cost estimates. The City is asking Proposers to estimate prices and hours for all categories with the understanding that they may have to make assumptions. Such assumptions should be stated. Proposers may submit additional pricing sheets as an addendum to the cost template; however the cost template MUST be completed.

The City may award a purchase contract, based on initial offers received without discussion of such offers. A Proposer’s initial offer should, therefore, be based on the most favorable terms available. It may also request revised pricing offers from such Proposers, and make an award and/or conduct negotiations thereafter.

3.0 PROPOSAL SELECTION AND AWARD PROCESS

3.1 Evaluation and Selection

A review and selection committee ("Selection Committee") consisting of representatives of the City will review and evaluate all proposals. As part of the selection process, the Selection Committee may interview none, some, or all of the Proposers for the Agreement. The Selection Committee will then make a recommendation to the City Council as to which Proposer should be awarded the Agreement.

The following criteria shall aid the Selection Committee in recommending which Proposer should be awarded the Agreement:

- Technical competencies as evidenced by the professional qualifications and related work experience of the firm. Specific professional qualifications, training, and experience of the assigned and committed personnel for the satisfactory performance of this work.
- Previous experience of the firm with related work. Positive references shall be considered.
- The Proposer's pricing to complete the Services.
- The firm's understanding of the Services to be performed and a description of the technical approach to be taken to accomplish the Services.

3.2 Verbal Presentations – Scripted Software Demonstrations

Selected Proposers may be required to make verbal presentations and scripted software demonstrations to supplement their proposals. The City has reserved the weeks of **October 22, 2018-November 9, 2018** for this purpose. Proposers will be required to have live demonstrations as well as a concurrent lab environment where users can access the proposed system. Proposers should plan to have enough staff on-site to provide coverage for both live demonstrations and the lab. Proposers should supply all equipment and hardware required for the lab environment. The City will make every reasonable attempt to schedule each presentation at a time which is agreeable to the Proposer. Failure of a Proposer to conduct a presentation to the City on the date scheduled may result in rejection of the Proposer's proposal.

3.3 Site Visits with Government Users in Live Environment

The City may conduct site visits to local government users of selected Proposers in order to observe the software in a live operating environment. This would be done prior to or after the scripted software demonstrations have been completed.

4.0 GENERAL TERMS AND CONDITIONS

4.1 Termination of RFP

The City reserves the right, at its sole discretion, to terminate this process at any time, or reject any and all proposals without penalty, prior to the execution of the Agreement.

4.2 Final Selection

Following the review by the City, the final selection, if any, will be based on the proposal which best meets the requirements set forth in the RFP and is in the best interest of the City.

4.3 Execution of Agreement

The City reserves the right to award the contract to the next most qualified firm if the successful firm does not execute a contract within 30 days after the award of the proposal.

4.4 Clarification

The City reserves the right to request clarification of information submitted and to request additional information of one or more Proposers.

4.5 Withdrawal of Proposal

Any proposal may be withdrawn up until the date and time set above for the opening of proposals by written request to the City Manager. Any proposals not so withdrawn shall constitute an irrevocable offer, for a period of 90 days, to provide the Services to the City, or until one or more of the proposals have been approved by the City, whichever occurs first.

4.6 Agreement

Any agreement or contract resulting from the acceptance of a proposal shall be on forms supplied or approved by the City. The City reserves the right to reject any agreement that does not conform to the request for proposal and the City's requirements for agreements and contracts.

4.7 Offers Only

Proposals submitted are offers only, and the decision to accept or reject is a function of quality, reliability, capability, reputation, and expertise of the firms submitting proposals. Issuance of this RFP does not obligate the City to pay any costs incurred by a respondent in its submission of a proposal or making any necessary studies or designs for the preparation of that proposal, or for procuring or contracting for the services to be furnished under this RFP.

4.8 Acceptance/Rejection

The City reserves the right to accept the proposal that is, in its judgment, the best and most favorable to the interests of the City and to the public; to reject the low price proposal; to accept any item of any proposal; to reject any and all proposals; and to waive irregularities and informalities in any proposal submitted or in the RFP process; provided, however, that the waiver of any prior defect or informality shall not be considered a waiver of any future or similar defect or informality. Proposers should not rely upon, or anticipate, such waivers in submitting their proposal.

4.9 Retention of Proposals

The City reserves the right to retain all proposals submitted and use any idea in a proposal regardless of whether the proposal is selected.

Attachment A – RFP Submittal Checklist

Task	Reference	Submitted
Background Material	2.5	
Executive Summary	2.6	
Scope of Services	2.7	
Company Background (including copy of certificate of insurance)	2.8	
Proposed Application Software and Computing	2.9	
Responses to Functional/Technical Requirements (Attachment C) ***Excel Format***	2.10	
Implementation Plan	2.11	
Training Plan	2.12	
Maintenance and Support Program	2.13	
City of Highland Park Specific Issues to be Addressed by RFP	2.14	
Client References (Attachment B) ***Excel Format***	2.15	
Exceptions to the RFP	2.16	
Sample Documents	2.17	
Price Proposal (Attachment D) ***Excel Format***	2.18	
Other Required Attachments		
Attachment A RFP Submittal Checklist	This sheet	
Attachment B Software Reference Form		
Attachment C Requirements Matrix		
Attachment D Price Proposal		
Number of Hard Copies	3	
Number of Digital Copies	1 USB	

Attachment B – Software Reference Form

References shall be included subject to the City's preferences cited in Section 2.15 of the RFP.

(Separate Excel Document Provided for Completion)

Attachment C - Requirements Matrix

(Separate Excel Document Provided for Completion)

Attachment D – Price Proposal

(Separate Excel Document Provided for Completion)

Attachment E – Benefit Tables

Employee Insurance Contribution Rates
January 1, 2018 - December 31, 2018

Percent of Premium		
Salary Band	Single	Family (Single + 1 - Single +>4)
$25,000 - $49,999.99	12%	13%
$50,000 - $89,999.99	14%	16%
$90,000 plus	16%	17%

5 % Wellness Benefit Tier Percent of Premium		
Salary Band	Single	Family (Single + 1 - Single +>4)
$25,000 - $49,999.99	7%	8%
$50,000 - $89,999.99	9%	11%
$90,000 plus	11%	12%

10% Wellness Benefit Tier Percent of Premium		
Salary Band	Single	Family (Single + 1 - Single +>4)
$25,000 - $49,999.99	2%	3%
$50,000 - $89,999.99	4%	6%
$90,000 plus	6%	7%

Full Rate Monthly Basis					
Plan	Single	Plus 1	Plus 2	Plus 3	Plus 4
HMO	$ 573.22	$ 1,354.70	$ 1,693.38	$ 2,032.05	$ 2,370.73
Base PPO	$ 675.12	$ 1,339.75	$ 1,674.69	$ 2,009.62	$ 2,344.56
PPO HCA	$ 719.33	$ 1,427.54	$ 1,784.42	$ 2,141.30	$ 2,498.19
PPO Plus	$ 738.58	$ 1,465.74	$ 1,832.18	$ 2,198.62	$ 2,565.05

Full Rate Biweekly Basis (Monthly x 12 % 26)					
Plan	Single	Plus 1	Plus 2	Plus 3	Plus 4
HMO	$ 264.56	$ 625.25	$ 781.56	$ 937.87	$ 1,094.18
Base PPO	$ 311.59	$ 618.35	$ 772.93	$ 927.52	$ 1,082.10
PPO HCA	$ 332.00	$ 658.86	$ 823.58	$ 988.29	$ 1,153.01
PPO Plus	$ 340.88	$ 676.50	$ 845.62	$ 1,014.75	$ 1,183.87

Employee's Biweekly Contribution Per Pay Period

HMO					
Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 31.75	$ 81.28	$ 101.60	$ 121.92	$ 142.24
$50,000 - $89,999.99	$ 37.04	$ 100.04	$ 125.05	$ 150.06	$ 175.07
$90,000 plus	$ 42.33	$ 106.29	$ 132.86	$ 159.44	$ 186.01
BASE PPO					
Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 37.39	$ 80.38	$ 100.48	$ 120.58	$ 140.67
$50,000 - $89,999.99	$ 43.62	$ 98.94	$ 123.67	$ 148.40	$ 173.14
$90,000 plus	$ 49.85	$ 105.12	$ 131.40	$ 157.68	$ 183.96
PPO HCA					
Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 39.84	$ 85.65	$ 107.07	$ 128.48	$ 149.89
$50,000 - $89,999.99	$ 46.48	$ 105.42	$ 131.77	$ 158.13	$ 184.48
$90,000 plus	$ 53.12	$ 112.01	$ 140.01	$ 168.01	$ 196.01
PPO PLUS					
Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 40.91	$ 87.94	$ 109.93	$ 131.92	$ 153.90
$50,000 - $89,999.99	$ 47.72	$ 108.24	$ 135.30	$ 162.36	$ 189.42
$90,000 plus	$ 54.54	$ 115.00	$ 143.76	$ 172.51	$ 201.26

Highland Park Employees WIN

Creating a culture of health

Employee Insurance Contribution Rates

January 1, 2018 - December 31, 2018

HMO

10% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 5.29	$ 18.76	$ 23.45	$ 28.14	$ 32.83
$50,000 - $89,999.99	$ 10.58	$ 37.51	$ 46.89	$ 56.27	$ 65.65
$90,000 plus	$ 15.87	$ 43.77	$ 54.71	$ 65.65	$ 76.59

5% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 18.52	$ 50.02	$ 62.52	$ 75.03	$ 87.53
$50,000 - $89,999.99	$ 23.81	$ 68.78	$ 85.97	$ 103.17	$ 120.36
$90,000 plus	$ 29.10	$ 75.03	$ 93.79	$ 112.54	$ 131.30

Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 31.75	$ 81.28	$ 101.60	$ 121.92	$ 142.24
$50,000 - $89,999.99	$ 37.04	$ 100.04	$ 125.05	$ 150.06	$ 175.07
$90,000 plus	$ 42.33	$ 106.29	$ 132.86	$ 159.44	$ 186.01

BASE PPO

10% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 6.23	$ 18.55	$ 23.19	$ 27.83	$ 32.46
$50,000 - $89,999.99	$ 12.46	$ 37.10	$ 46.38	$ 55.65	$ 64.93
$90,000 plus	$ 18.70	$ 43.28	$ 54.11	$ 64.93	$ 75.75

5% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 21.81	$ 49.47	$ 61.83	$ 74.20	$ 86.57
$50,000 - $89,999.99	$ 28.04	$ 68.02	$ 85.02	$ 102.03	$ 119.03
$90,000 plus	$ 34.28	$ 74.20	$ 92.75	$ 111.30	$ 129.85

Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 37.39	$ 80.38	$ 100.48	$ 120.58	$ 140.67
$50,000 - $89,999.99	$ 43.62	$ 98.94	$ 123.67	$ 148.40	$ 173.14
$90,000 plus	$ 49.85	$ 105.12	$ 131.40	$ 157.68	$ 183.96

PPO HCA

10% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 6.64	$ 19.77	$ 24.71	$ 29.65	$ 34.59
$50,000 - $89,999.99	$ 13.28	$ 39.53	$ 49.41	$ 59.30	$ 69.18
$90,000 plus	$ 19.92	$ 46.12	$ 57.65	$ 69.18	$ 80.71

5% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 23.24	$ 52.71	$ 65.89	$ 79.06	$ 92.24
$50,000 - $89,999.99	$ 29.88	$ 72.47	$ 90.59	$ 108.71	$ 126.83
$90,000 plus	$ 36.52	$ 79.06	$ 98.83	$ 118.60	$ 138.36

Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 39.84	$ 85.65	$ 107.07	$ 128.48	$ 149.89
$50,000 - $89,999.99	$ 46.48	$ 105.42	$ 131.77	$ 158.13	$ 184.48
$90,000 plus	$ 53.12	$ 112.01	$ 140.01	$ 168.01	$ 196.01

PPO PLUS

10% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 6.82	$ 20.29	$ 25.37	$ 30.44	$ 35.52
$50,000 - $89,999.99	$ 13.64	$ 40.59	$ 50.74	$ 60.88	$ 71.03
$90,000 plus	$ 20.45	$ 47.35	$ 59.19	$ 71.03	$ 82.87

5% Wellness Benefit Tier Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 23.86	$ 54.12	$ 67.65	$ 81.18	$ 94.71
$50,000 - $89,999.99	$ 30.68	$ 74.41	$ 93.02	$ 111.62	$ 130.23
$90,000 plus	$ 37.50	$ 81.18	$ 101.47	$ 121.77	$ 142.06

Premium Contribution

Salary Band	Single	Plus 1	Plus 2	Plus 3	Plus 4
$25,000 - $49,999.99	$ 40.91	$ 87.94	$ 109.93	$ 131.92	$ 153.90
$50,000 - $89,999.99	$ 47.72	$ 108.24	$ 135.30	$ 162.36	$ 189.42
$90,000 plus	$ 54.54	$ 115.00	$ 143.76	$ 172.51	$ 201.26

City of Highland Park

Highland Park Fire Fighters Union Member Rates

January 1, 2018 through December 31, 2018

Full Rate
Monthly Basis

	EE	EE + 1	Family	Family	Family
HMO	$ 573.22	$ 1,354.70	$ 1,796.29	$ 1,796.29	$ 1,796.29
Base PPO	$ 675.12	$ 1,339.75	$ 2,010.11	$ 2,010.11	$ 2,010.11
PPO HCA	$ 719.33	$ 1,427.54	$ 2,141.88	$ 2,141.88	$ 2,141.88
PPO Plus	$ 738.58	$ 1,465.74	$ 2,199.18	$ 2,199.18	$ 2,199.18

Full Rate
Per Pay Period Basis

	EE	EE + 1	Family	Family	Family
HMO	$ 264.56	$ 625.25	$ 829.06	$ 829.06	$ 829.06
Base PPO	$ 311.59	$ 618.35	$ 927.74	$ 927.74	$ 927.74
PPO HCA	$ 332.00	$ 658.86	$ 988.56	$ 988.56	$ 988.56
PPO Plus	$ 340.88	$ 676.50	$ 1,015.01	$ 1,015.01	$ 1,015.01

Plan Name	Salary Band	Contribution Per Pay Period				
HMO		Employee	E+1	E+2	E+3	E+4
	Up to $35,000	$ -	$ 10.13	$ 18.16	$ 22.63	$ 26.53
	$35,001 - $50,000	$ 5.69	$ 23.57	$ 35.98	$ 40.46	$ 44.35
	$50,001 - $75,000	$ 9.26	$ 38.33	$ 58.61	$ 65.91	$ 72.29
	$75,001 - $100,000	$ 13.23	$ 54.77	$ 83.73	$ 94.10	$ 103.22
	$101,001 +	$ 15.03	$ 62.21	$ 95.09	$ 106.87	$ 117.23
Base PPO		Employee	E+1	E+2	E+3	E+4
	Up to $35,000	$ -	$ 10.02	$ 20.32	$ 25.33	$ 29.69
	$35,001 - $50,000	$ 6.70	$ 23.31	$ 40.26	$ 45.27	$ 49.63
	$50,001 - $75,000	$ 10.91	$ 37.90	$ 65.59	$ 73.76	$ 80.90
	$75,001 - $100,000	$ 15.58	$ 54.17	$ 93.70	$ 105.30	$ 115.50
	$101,001 +	$ 17.70	$ 61.53	$ 106.41	$ 119.59	$ 131.18
PPO HCA		Employee	E+1	E+2	E+3	E+4
	Up to $35,000	$ -	$ 10.67	$ 21.65	$ 26.99	$ 31.63
	$35,001 - $50,000	$ 7.14	$ 24.84	$ 42.90	$ 48.24	$ 52.89
	$50,001 - $75,000	$ 11.62	$ 40.39	$ 69.89	$ 78.59	$ 86.20
	$75,001 - $100,000	$ 16.60	$ 57.72	$ 99.84	$ 112.20	$ 123.08
	$101,001 +	$ 18.86	$ 65.56	$ 113.39	$ 127.43	$ 139.78
PPO Plus		Employee	E+1	E+2	E+3	E+4
	Up to $35,000	$ -	$ 10.96	$ 22.23	$ 27.71	$ 32.48
	$35,001 - $50,000	$ 7.33	$ 25.50	$ 44.05	$ 49.53	$ 54.30
	$50,001 - $75,000	$ 11.93	$ 41.47	$ 71.76	$ 80.69	$ 88.51
	$75,001 - $100,000	$ 17.04	$ 59.26	$ 102.52	$ 115.20	$ 126.37
	$101,001 +	$ 19.36	$ 67.31	$ 116.42	$ 130.83	$ 143.52

Highland Park Employees WIN

Creating a culture of health

WIN Points Summary Chart

Phase 1-Program Eligibility					
ACTIVITY	POINTS EARNED	PROGRAM GUIDELINES	EMPLOYEES	SPOUSES	FINAL DATE TO EARN WIN POINTS
Biometric Screening	N/A	**Required** - Will be administered by wellness vendor.	✓	✓	February 2018
Health Risk Assessment (HRA)	N/A	**Required** - Will be administered by wellness vendor.	✓	✓	October 31, 2018
Coaching Sessions	N/A	May be **required** - Coaching will be determined by risk factors from HRA & Biometric Screening.	✓	✓	October 31, 2018
Phase 2-Earning WIN Points Points Needed to Earn 10% Single 100 or with Spouse 150 Points Needed to Earn 5% Single 50 or with Spouse 75					
Zero Risk Factors	30	Employees or spouses can earn 30 points for zero risk factors based on biometric screening results.	✓	✓	October 31, 2018
Milestone Screening	25	Employees or spouses will earn 25 points for any required screening; only employees who fall into the age requirement or risk factors are eligible.	✓	✓	October 31, 2018
Wellness Exam	20	Employees or spouses who complete a physical will earn 20 points; must submit physical form to receive credit.	✓	✓	October 31, 2018
Dental Visit	20	Employees or spouses will receive 20 points for a dental visit; must submit dental form to receive credit.	✓	✓	October 31, 2018
Complete eLearning Lessons	30	Access the WIN website to complete eLearning lessons on various topics. Employees or Spouses will receive 5 points per lesson.	✓	✓	October 31, 2018
Health and Fitness Trainings	15	Employees will receive 15 points per training attended; sign in is required to receive points. There are a minimum of 4 trainings per program year.	✓	✓	October 31, 2018
Health Challenge Programs	25	Employees or spouses can earn 25 points after completing a challenge. There are a minimum of 4 challenges per program year.	✓	✓	October 31, 2018
Fitness Bonus Tests	30	Employees are not required to pass to earn points; 10 points will be awarded per test—3 test limit.	✓	✓	October 31, 2018
Use of Fire/Police Fitness Center, Rec Center Track or Home Gym	20	Employees or spouses will receive 2 points per visit up to 10 visits (Police station is only available to Police Employees); sign in or affidavit is required to receive points.	✓	✓	October 31, 2018
Gym Membership	20	Employees or spouses will receive 20 points if they have an active gym membership; proof of membership is required.	✓	✓	October 31, 2018
External Nutrition or Fitness Programs	20	Employees or spouses will receive 20 points if they belong to a nutritional program or fitness league/group.	✓	✓	October 31, 2018
Organized Run / Walk (5K, 10K, Half Marathon, etc.)	10	Employees or spouses who submit a copy of a race bib or registration confirmation can earn 5 points per run/walk up to 10 points. City sponsored races cannot be used to earn points in this category.	✓	✓	October 31, 2018