

REQUEST FOR PROPOSAL # MCARC-106

Riverside County Regional Medical Center (RCRMC) LAN Assessment, Migration, and Training Services



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INSTRUCTIONS TO BIDDERS

Buyer: Rick Hai Email: rhai@co.riverside.ca.us

Visit our Website: www.purchasing.co.riverside.ca.us

Telephone: (951) 955-4937

- I. Vendor Registration – Unless stated elsewhere in this document, vendor must register online at www.Purchasing.co.riverside.ca.us with all current Vendor information, to be registered on the County's database.
 - II. Prices/Notations All prices/notations must be typewritten or written in ink. No erasures permitted. Mistakes shall be crossed out, corrections made adjacent and initialed by person signing document. Each item shall be bid separately.
 - III. Pricing/Terms/Tax - All pricing shall be quoted both F.O.B. shipping destination, (e.g., cash terms less than 20 days should be considered net) excluding applicable tax. The County pays California Sales Tax and is exempt from Federal excise tax. In the event of an extension error, the unit price shall prevail.
 - IV. Period of Firm Pricing - Unless stated otherwise elsewhere in this document, prices shall be firm for 180 days after the RFP closing date. If the County elects to do negotiations that require additional time, the County may request bidder's prices be firm for an additional period of time to complete negotiations and award the contract.
 - V. Recycled Material - Wherever possible, the County of Riverside is looking for items made from, or containing in part, recycled material. Bidders are encouraged to bid items containing recycled material as an alternative for the items specified; however, the County reserves the right to reject those alternatives as non-responsive.
 - VI. Method of Award - The County reserves the right to reject any or all offers, to waive any discrepancy or technicality and to split or make the award in any manner determined by the County to be most advantageous to the County. The County recognizes that prices are only one of several criteria to be used in judging an offer and the County is not legally bound to accept the lowest offer.
 - VII. Other Terms and Conditions – The terms and conditions as indicated in this document and/or attached are hereby included with full force and like effect as if set forth herein. Copies of the applicable Terms and Conditions may be obtained by visiting the County's website at www.purchasing.co.riverside.ca.us or contact Riverside County Purchasing at the number shown above and request a copy to be faxed or mailed to you.
 - VIII. Return of Bid/Closing Date/Return to - The bid response shall be delivered to **Purchasing and Fleet Services, 2980 Washington Street, Riverside, CA 92504 by 1:30 p.m.** on the closing date listed above. Bid responses not received by County Purchasing by the closing date and time indicated above will not be accepted. The closing date and time and the R.F.Q./R.F.P. number referenced above shall appear on the outside of the sealed envelope. A duly executed copy of the signature page of this bid document must accompany your response. The County will not be responsible for and will not except late bids due to delayed mail delivery or courier services.
 - IX. Auditing – The Contractor agrees that Riverside, County the State of California, the Federal government, or designated representatives shall have the right to review and copy any records and supporting documentation pertaining to the performance of this contract. Contractor agrees to maintain such records for possible audit for a minimum of (3) years after final payment, or until closure of pending matter unless a longer period of records retention is stipulated. Contractor agrees to allow auditor(s) access to such records during normal business hours and allow interviews of any employees or others who might reasonably have information related to such records. Further, the Contractor agrees to include a similar right of Riverside County, the State of California, or the Federal government to audit records and interview staff in any subcontract related to the performance of this contract.
 - X. Local Preference - The County of Riverside has adopted a local preference program for those bidders located within the County of Riverside. A five percent (5%) price preference may be applied to the total bid price during evaluation of the bid responses. To qualify as a local business, the business must have fixed offices within the geographical boundaries of Riverside County and must credit all sales taxes paid resulting from this RFQ/P to that Riverside County location. To qualify for local preference BIDDER must include a copy of a Riverside Business Tax Certificate that supports the local preference status and complete Form 116-260 Local Business Qualification Affidavit. Application of this local preference may be waived if funding sources disallow it.
- Or
- XI. Disabled Veteran Business Enterprise Preference - The County of Riverside has implemented a Disabled Veteran Owned Business preference policy. A three (3) percent preference shall be applied to the total bid price of all quotes/bids/proposals received by the County from certified disabled veterans owned businesses. Bidder must provide certification of Disabled Veteran Status. If the bid is submitted by a non-Disabled Veteran owned business, but lists subcontractors that are identified and qualified as Disabled Owned Business, the total bid price will be adjusted by 3% of the value of that subcontractor's portion of the bid.

IF CHECKED, THE FOLLOWING DOCUMENTS HEREBY MADE PART OF THIS RFQ/P

Please go to www.purchasing.co.riverside.ca.us to access these terms and conditions

☒ APPENDIX "A"	☒ EXHIBIT (A-D)	☐ PLANS/DRAWINGS	☐ SAMPLES
☐ #116-110	Special Conditions/Response	☐ 116-150	Special Conditions RFP
☐ #116-140	Special Conditions Personal/Professional Services RFP	☐ 116-130	Equipment Information Sheet
☒ #116-260	Local Business Qualification Affidavit		

**IF CHECKED, THE FOLLOWING GENERAL CONDITIONS ARE INCLUDED WITH FULL FORCE
AND LIKE EFFECT AS IF SET FORTH HEREIN**

☐ #116-200	General Conditions	☐ #116-210	General Conditions Materials and/or Services
☐ #116-230	General Conditions - Equipment	☐ #116-220	General Conditions - Public Works
☒ #116-240	General Conditions - Personal/Professional Service		

Proposal Cover Page

BIDDER TO COMPLETE ALL APPLICABLE AREAS

Bidders are required to register (If not already registered) on the County of Riverside Purchasing website:

WWW.PURCHASING.CO.RIVERSIDE.CA.US

The County of Riverside Purchasing Department on behalf of the Riverside County Regional Medical Center (RCRMC) is soliciting proposals from qualified organizations to provide LAN Assessment, Migration, and Training Services as detailed in Appendix A.

There will be a (Mandatory) bidders meeting to be held on:

Date: April 29, 2009

Time: 1:00 PM

Location:

26520 Cactus Avenue, Moreno Valley, CA 92555
Conference Room B & Room C

BID CLOSING DATE: May 21, 2009 no later than 1:30 pm.

NO FAXED PROPOSALS WILL BE ACCEPTED

After close of this RFP, the award may be announced within 30- 120 days.

If an addendum is issued for this procurement, it will be the Bidder's responsibility to retrieve all applicable addendum(s) from the Purchasing website.

"Execution hereof is certification that the undersigned has read and understands the terms and conditions hereof, and that the undersigned's principal is fully bound and committed."

Company
Name:

Street Address:

Mailing Address:

City: State: Zip:

Remit to Address:

City: State: Zip:

Phone # () FAX # ()

Vendor Website:

Name: Title:

Signature: Date: Email:

Please Check ☐ Disabled Veteran or ☐ Local Business – if checked, the above signer certifies that the above business is located within the geographical boundaries of Riverside County and that all sales taxes generated based on this RFP will be credited to that location in Riverside County. Form 116-260 must be completed and submitted with the Bidder's proposal

APPENDIX A SCOPE OF SERVICE

1.0 DEFINITIONS

Wherever these words occur in this RFP, they shall have the following meaning:

- A. “RFP” shall mean Request for Proposal.
- B. “Addendum” shall mean an amendment or modification to the RFP (Request for Proposals).
- C. “Bid” shall mean the proposal submitted by a Bidder on the Bid Form consistent with the Instructions to Bidders, to complete the Work for a specified sum of money and within a specified period of time.
- D. “Bidder” shall mean an individual, firm, partnership or corporation that submits a qualified Bid for the Work, either directly or through a duly authorized representative.
- E. “Contractor” shall mean any employee, agent or representative of the contract company used in conjunction with the performance of the contract. For the purposes of this RFP, Contractor and Bidder are used interchangeably.
- F. “MQs” shall mean minimum qualifications.
- G. “COUNTY” shall mean the County of Riverside and its Riverside County Regional Medical Center. For purposes of this RFP, RCRMC and County are used interchangeably.
- H. “OS” shall mean Operating System.
- I. “MRI” shall mean Magnetic Resonance Imaging.
- J. “CT” shall mean Computerized Tomography.
- K. “RDD” shall mean Requirement Definition Document.
- L. “DNS” shall mean Domain Name System.
- M. “WINS” shall mean Windows Internet Name Service.
- N. “VPN” shall mean Virtual Private Network.
- O. “ACL” shall mean Access Control List.
- P. “PKI” shall mean Public Key Infrastructure.
- Q. “HIS” shall mean Hospital Information Services.
- R. “DDS” shall mean Detailed Design Solution.
- S. “WAN” shall mean Wide Area Network.
- T. “LAN” shall mean Local Area Network.

- U. "DHCP" shall mean Dynamic Host Configuration Protocol.
- V. "MOF" shall mean Microsoft Operation Framework.
- W. "FTP" shall mean File Transfer Protocol
- X. "NDS" shall mean Novell Directory Services

2.0 PURPOSE/BACKGROUND

2.1 PURPOSE: The County of Riverside Purchasing (County) on behalf of Riverside County Regional Medical Center (RCRMC) is soliciting this Request for Proposal (RFP) for a qualified organization that can provide assessment of the current environment and provide system migration services to Microsoft environment. This migration is necessary to transition RCRMC's current server and workstation infrastructure into a world-class infrastructure to support a new Hospital Information System.

2.2 The successful bidder will provide and provide in writing in detail the following services:

- a. Complete inventory of existing network environment (excluding items listed in Out of Scope section)
- b. The design and migration to a Windows 2003 Active Directory Service structure suitable for RCRMC
- c. The design and migration from a Novell 4.1 Network Operating System to Windows Server 2003 Active Directory
- d. The design and migration from Novell GroupWise 6.5 to Exchange Server 2007
- e. Implementation assistance with planning, requirements, and setup of workstations migration/upgrade/replacement.
- f. Provide support to the operations team for problem escalation and resolution for a period of two weeks after the migration is completed.
- g. Training of user base on Exchange
- h. Training of operations staff on supporting the new Microsoft environment and Exchange

2.3 This is optional. RCRMC would like to receive cost estimates for managed services of IT operations to support the new environment. If bidders submit cost estimates for the managed services, the following options are required:

- a. 7x24x365 On-Site Support Model, or
- b. 7x24x365 Hybrid Support Model (on-site, on-call, and remote monitoring), or
- c. 6am-6pm 7x365 On-Site and 6pm-6am 7x365 On-Call Support Model

2.4 BACKGROUND:

Riverside County is the fourth largest county in the state by population, consisting of over 7200 square miles and stretching nearly 200 miles across. Riverside County shares borders with densely populated Los Angeles, Imperial, Orange, San Diego, and San Bernardino Counties, and extends from within 14 miles of the Pacific Ocean to the Colorado River.

2.5 Riverside County Regional Medical Center (RCRMC) is located in the city of Moreno Valley, centrally located and accessible for all areas of Riverside County.

2.6 Although the institution is over 100 years old, a new modern, seismically compliant building opened in March 1998. The Medical Center is a 520,000 square foot state-of-the-art tertiary care and level II adult and pediatric facility, licensed for a total of 439 beds. There are 362 licensed beds in the main acute-care hospital, and 77 licensed beds in a separate psychiatric facility. RCRMC has 12 operating rooms, a helipad located

directly adjacent to the Trauma Center, and state-of-the-art digital radiology services, including magnetic resonance imaging (MRI) and computerized tomography (CT) and all single bed rooms. There are also adult, pediatric and neonatal intensive care units, a birthing center and complete pulmonary services including hyperbaric oxygen treatments. The award winning RCRMC is well designed and equipped to provide the latest in health care through the 21st century and beyond.

2.7 A teaching hospital accredited by the Joint Commission for Accreditation of Healthcare Organizations (Joint Commission), RCRMC offers training programs for nursing students, medical residents, and allied health professionals attending Riverside Community College, Loma Linda University, Western College of Health Services, and other facilities.

2.8 RCRMC has the capacity to manage 200,000 patient visits in specialty outpatient clinics; the Emergency Room/Trauma Unit has the capacity to manage 100,000 patient visits annually. Employees and staff are at approximately 2,100. RCRMC is located at: 26520 Cactus Avenue, Moreno Valley, CA 92555. RCRMC HIS Project Team is located at 14375 Nason Street, Moreno Valley, CA 92555.

2.9 RCRMC has a large majority of services that run on equipment that are past end of life. RCRMC has an initiative to replace its current Intel based systems. Some or all of the listed hardware may continue to be used in a production or support environment and may not be taken into consideration for this project.

2.10 The following list is an approximation:

- a. 6 Novell 4.11 file and print servers only running IPX
- b. 1 Groupwise 7.0 Mail server
- c. 1 Novell 6.5 server, (Fiscal)
- d. 3 or 4 Novell 6.5 pre-production test servers.
- e. 15 Windows 2000 servers
- f. 10 Windows 2003 servers
- g. 6 NT 4 Servers
- h. 6 Linux Servers
- i. 1 Linux iSCSI server, connected to HP EVA6000
- j. 2 Alpha Servers
- k. 1 Alpha test Server
- l. 12 plus miscellaneous servers - combination of: MS/Linux, VM and VirtualBox, and ZEN for various project efforts.

2.11 RCRMC IT supports approximately 1500 plus workstations, hundreds of printers and other devices over 3500 nodes network located at three locations: the Hospital, CPC, and remote Mental Health facility.

3.0 MANDATORY MINIMUM REQUIREMENTS

3.1 Interested and qualified Bidders' that can demonstrate their ability to successfully provide the services outlined in Section 4.0, Scope of Work, of this RFP are invited to submit proposal(s), provided they meet the following minimum, mandatory requirements. An initial screening of all proposals will be conducted by County Purchasing and RCRMC Proposal Evaluation Committee. Any proposal fails to meet any of the following "Mandatory (Pass/Fail) Minimum Requirements"; the proposal may be rejected and not evaluated.

- a. Bidder must have at least five (5) years experience providing specialized assessment, migration and training services from Novell environment to Microsoft environment, equivalent or similar to the Services identified in Section 4.0, Scope of Work.
- b. Bidder must have a Contract Manager assigned to this project with at least five (5) years of

project management experience in similar engagements to that specified in this RFP.

- c. Bidder must submit a minimum of five (5) references that will individually or collectively validate Bidder's ability to successfully perform the assessment and migration of similar engagements.
- d. Bidders must provide documentation of current and active Microsoft Gold Certified Partner standing along with documentation of current and active Microsoft Registered Partner (minimum required standing) for all third parties.

4.0 SCOPE OF SERVICE

Currently RCRMC is utilizing the Microsoft Solutions Framework. This framework and methods utilize an iterative process, which offers a systematic approach as well as proven component level design, resulting in a solid solution. By following this approach, the solution can be built, one block at a time, and then refined before moving on to the next block. The flexibility needed to return to the previous block and fix it is maintained, which allows for better control of the requirements and traceability. The requirements from the previous process are realized and are not missed during the next iteration.

RCRMC requires the successful bidder to deliver the entire solution as required by this RFP within a five (5) months performance period upon executing of the agreement.

The following phases shall be required in the performance of this contract, and in achieving RCRMC's project objectives:

4.1 Phase 1

4.1.1 Perform a detailed and well documented inventory

It is critical that the selected vendor conduct a thorough and detailed discovery assessment to formulate a baseline understanding of the existing environment. The following bulleted items represent the minimum items to be evaluated and documented:

- a. Operating systems (servers, desktops, and portable devices)
- b. Protocols
- c. Services
- d. Login scripts
- e. User accounts (types, special settings, home directory, scripts, etc)
- f. Group accounts
- g. NDS and any other directory service. (customizations or extensions)
- h. Security settings (password length, expiration, existing anti-virus and SPAM filtering system, backup and disaster recovery plans, etc.)
- i. Monitoring systems
- j. External access to services (include services provided to users and those provided by servers such as FTP, web, mail, VPN, etc)
- k. Communication systems (fax, video, etc)
- l. Identify all software, including Novell dependent software, Groupwise e-mail system (web services, messaging, instant messaging, calendar, contacts, and to do list integration, message archiving, support for mobile devices, mail box sizes, etc)
- m. File and print services
- n. Terminal services
- o. PC client system requirements – Operating Systems , office suites, and other applications
- p. Hardware configurations for servers, desktops, mobile devices
- q. Identify all types of information stored on the Netware network (not just NDS or Bindery information), including its owners, users, locations, and its security, where it is stored, its

size, who is responsible for which information, which subsets of users have access to which data, and what the associated security requirements are.

4.1.2 Deliverables

4.1.2.1 Detailed Inventory:

4.1.2.1.1 **Must be included with the response to the RFP** – Section 12.0, sub-section D: A project plan to complete this phase showing resources, time frame, and milestones (Include signoff milestones).

4.1.2.1.2 Detailed Infrastructure documentation of the current environment network, Including:

4.1.2.1.2.1 Diagram the environment and all its components (hardware and Operating System). Identify which servers are file and print servers, Internet servers, mail servers, database servers, etc. Document servers thoroughly, including OS versions, transport protocols, and directory versions (Bindery or NDS)

4.1.2.1.2.2 Detailed categorized list of inventory that in compliance with ITIL V3 supported format (in an electronic format such as a Microsoft SQL) and printed hardcopy of reports showing the following but not limited to:

4.1.2.1.2.2.1 Servers:

- a. Operating System (Novell, Dec, Unix)
- b. Hardware specifications
- c. Serial numbers

4.1.2.1.2.2.2 Desktops / Laptops:

- a. Operating System
- b. Processor
- c. Serial numbers

4.1.2.1.2.2.3 Printers (Output devices):

- 4.1.2.1.2.2.3.1 Locally attached
- 4.1.2.1.2.2.3.2 Network attached
- 4.1.2.1.2.2.3.3 Serial numbers
- 4.1.2.1.2.2.3.4 Attached devices

4.1.2.1.2.2.4 Scanners:

Barcode readers

4.1.2.1.2.2.5 Applications

4.1.2.2 Must be included with the response to the RFP – Provide ITIL V3 compliant configuration matrix showing data fields and description. Indicate preferred underlying technology (e.g. MS Sql, MySql, and Excel) that will be used to deliver the final detailed inventory.

4.1.2.3 RCRMC will need the ability to electronically evaluate and search for various combinations of hardware and software.

4.1.3 Acceptance Letter

4.1.2.1 The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this phase.

4.2 Phase 2

4.2.1 Migration from Novell Netware to Microsoft Active Directory Domain Services

Migration from a Novell Netware based environment to a Microsoft Active Directory Domain Services environment.

This migration will need to include all services currently provided through Novell Netware. The implementation will need to provide a secure, well documented Active Directory Domain Services suitable for RCRMC. Development of group policies, procedures, and standards suitable to support and maintain the final Detail Design Solution.

- 4.2.1.1 To implement a secure, well documented Active Directory Services infrastructure, as well as the migration of all user accounts, printers, and other devices.
 - 4.2.1.2 To develop group policies, procedures, and standards suitable for RCRMC.
 - 4.2.1.3 Develop a migration plan with specific objectives and timeline for the move of RCRMC's current Novell environment to Windows 2003 Active Directory. Also, develop as part of this plan the capability to roll back to the existing Novell environment in the event that a catastrophic problem is encountered during the upgrade process.
 - 4.2.1.4 Ensure that during the migration process that critical applications are still operating correctly after the migration. Minimizing user, application, and server impact during the migration is of the utmost importance.
 - 4.2.1.5 Configure the new Active Directory domain DNS, and also migrate DHCP to the server running DNS.
 - 4.2.1.6 Establish processes and standards for adding and maintaining remote locations under Active Directory.
 - 4.2.1.7 Establish a Web Access for electronic mail retrieval.
 - 4.2.1.8 Provide initial support for the implementation of client access to the new Microsoft domain, with the goal of RCRMC IT technical staff completing an automated rollout of any client pieces and/or Microsoft Outlook to the desktop.
 - 4.2.1.9 Provide support and informal phone mentoring for two weeks at no cost following implementation.
- 4.2.2 RCRMC has the expectation that at a minimum the selected vendor will perform the following during the Analysis, Design, Built/Test, and Migration processes:
- 4.2.2.1 Analysis:**
 - 4.2.2.1.1 Migration is critical to success. Without well tested migration paths, new solutions can fail because legacy components introduce risks that were never accounted for during planning.
 - 4.2.2.1.2 The objectives of this Phase 2 Analysis are:
 - 4.2.2.1.2.1 Identify and mitigate all risks discovered during Phase 1
 - 4.2.2.1.2.2 To divide the migration activities into smaller, more manageable components, with well defined tasks that can then be addressed separately
 - 4.2.2.1.2.3 To finalize basic design decisions about the overall migration solution and confirm the High Level Requirements
 - 4.2.2.1.3 During the analysis process it is RCRMC expectation that the selected vendor will validate our High Level Requirements and will make recommendations. However, based upon the Analysis of Phase 1, RCRMC may find it necessary to modify the High Level Requirements in order to meet the Hospital Information Services (HIS), regulatory, functionality, or other requirements. RCRMC will modify the High Level Requirements documentation as required.

4.2.2.1.4 Using the initial High Level Requirements (provided to selected vendor by RCRMC) and taking the information from Phase 1, perform an assessment and identify gaps and all migration issues. Create a conceptual migration design by providing more detailed logical and functional technical specifications to the set of core infrastructure and operational components and processes that are in scope. During the design process, more concrete decisions about system components, such as how they are constructed, what are their functions, how are they used, where are they placed, and how they are integrated will be addressed.

4.2.2.1.5 **Guidelines**

4.2.2.1.5.1 The following general areas should be considered when performing the Analysis:

- a. Type of migration - Upgrade, restructure or pristine (parallel) environment
- b. Automated vs. manual deployment process
- c. What tools? (including scripts)
- d. Size of migration
- e. Coexistence requirements
- f. Decommissioning of replaced resources
- g. Rollback
- h. Pre-migration and post-migration tasks
- i. Support and end user readiness

4.2.2.1.5.2 The following identified components need to take into consideration as part of the migration project:

- a. Data - user data, application data, profiles, databases, mailboxes, PDAs, etc.
- b. Network - Dynamic Host Configuration Protocol (DHCP), Domain Name System (DNS), Windows Internet Name Service (WINS), Virtual Private Network (VPN)/Remote Access
- c. Directory Services - users, computers, groups, schema, policies
- d. Security - Access Control Lists (ACLs), templates, user rights assignments, Public Key Infrastructure (PKI)
- e. Server - Operating System (OS) servers, Messaging and Collaboration servers, Change and Configuration Management servers, etc.

4.2.2.1.6 **Signoff - Analysis:**

Once the High Level Requirements have been confirmed, RCRMC will signoff on them thus establishing the finalized scope of the project. Once signed off, the Design process can begin.

4.2.2.1.7 **Deliverables - Analysis:**

4.2.2.1.7.1 The Requirements Definition Document (RDD):
The purpose of this document is to gain an understanding of the changes to the current business processes and technology that will be required to support the goals,

expectations, and high level requirements of the new solution.

- 4.2.2.1.7.2 Current application capabilities are compared against the goals, expectations, and high level requirements for the new solution. Possible analysis could indicate when a new component or suite of components of the solution is needed. Also it could indicate that an existing application or product needs to be updated, or no change/migration is required. Examples of changes include the following:
 - a. Functional changes
 - b. Data migration
 - c. User migration
 - d. Interface or communication changes
- 4.2.2.1.7.3 Likewise, the current operational infrastructure is examined to determine what is needed to enable the new capability. Changes or enhancements to the operational infrastructure may include:
 - a. Transaction workload
 - b. Network capacity
 - c. Communications speed, reliability, security
 - d. Physical compatibility
 - e. Servers consolidation
- 4.2.2.1.7.4 The following represent the minimum items to be evaluated and documented in the RDD:
 - a. Systems/applications. Determine which systems/applications can be migrated or possibly decommissioned
 - b. Determine how users, groups, objects, folders, files, databases, and e-mail systems (GroupWise or others) will be affected
 - c. Issues discovered during phase 1 that will require special attention during the migration.
 - d. Directly address all gaps discovered during Phase 1

4.2.2.2 Design:

- 4.2.2.2.1 The Design stage focuses on creating a Detailed Design Solution (DDS), built upon the Requirements Definition Document (RDD).
- 4.2.2.2.2 The overall objective of this process is to identify the viable migration options and tools that are available, and to develop the best approach based on the project scope, goals, and approved requirements. Emphasis should be placed on developing an approach that is as efficient and seamless as possible, with little or no interruption to users, the network, other systems, or to the business.
- 4.2.2.2.3 The Design stage is the beginning of an iterative process that will allow for all assumptions to be proven (Proof of Concept (POC) described below), built, and tested. All assumptions will need to be documented clearly in the DDS along with the outcome of each POC.

- 4.2.2.2.4 With the migration to new technology, there is a chance that existing business, office productivity, and other applications may be impacted. The developed migration approach will need to address this by planning tasks designed to help ensure each application is identified, categorized, and prioritized so that testing and remediation tasks can be executed in later activities to ensure compatibility with the proposed infrastructure change.
- 4.2.2.2.5 Depending on the number of applications and the test approach, application testing may require considerable cooperation from various business units and application owners. Tasks will need to be added to identify the application stakeholders early in the project and lobby to get them involved to review and approve the test plans or to commit resources to an agreed upon level.
- 4.2.2.2.6 The migration design must address the processes and tasks for operations support to ensure that the new infrastructure can be properly supported and managed. RCRMC committed to the principles of the Microsoft Operations Framework (MOF). This activity focuses on the technology, organization, and process aspects of operations. While these tasks will focus of the operations architecture to support the runtime or production environment, the test environments used throughout this project should be considered in scope as well. It is critical that all of the existing infrastructure and operations processes be understood, as the impact of the new infrastructure will affect the operations staff and will provide RCRMC a clear understanding on how each of the existing Service Level Agreements (SLAs) will be clearly assessed.
- 4.2.2.2.7 Development of Test Plans. These tasks will define and document in the DDS the types of testing to be performed, outline high level test scenarios for each test type defined, and to create high level test plan outlines that the project team will leverage in later stages of the project. Test plans are outlined as the logical design is completed, migration and application remediation approaches are developed, and operations processes and the support model are defined. The high level test plans will be based on completed project approach, the logical design, as well as the functional and technical requirements. In later stages, test cases for each test type will be executed in a thorough testing activity designed to ready the system for release.
- 4.2.2.2.8 It is the vendor responsibility to provide necessary tools as part of the proposal. If alternative exists to provide potential savings to RCRMC, bidders should be clearly stated in their response.
- 4.2.2.2.9 Proof of Concept (POC):
 - 4.2.2.2.9.1 A technical risk is one that threatens the technical correctness of the solution. In other words, some part of the proposed solution may be impossible to develop with existing technology or may not meet the requirements. Designers, at the time of designing, might not know whether the particular configuration is viable. If they don't

know and don't have time to determine viability, but assume that the configuration will work, then there is a technical risk.

- 4.2.2.2.9.2 Technical risks are by far the easiest to handle, because they are, after all, only technical problems, the answers to which are not currently known. Technical risks are determined by performing a set of exploratory actions. This should be done preferably as early in the life of the project as possible by development of proof-of-concept prototypes.
- 4.2.2.2.9.3 RCRMC is requiring that all identified risks/assumptions/unknowns to be documented in the DDS and that a POC must be completed to address each issue. The outcome of each POC must also be documented in the DDS.
- 4.2.2.2.9.4 RCRMC will work closely with the vendor to ensure that all Design decisions are viable.

4.2.2.2.10 Signoff - Design:

Once the Detail Design Solution document has been created or modified, RCRMC will signoff on the assumptions and approach thus establishing the baseline for the vendor to build and test against. Since the Design stage is part of an iterative process RCRMC will be required to signoff on each iteration prior the Detail Design Solution document moving into the Build/Test stages.

4.2.2.2.11 Deliverables - Design:

- 4.2.2.2.11.1 Detailed Design Solution, at a comprehensive level, describes what will happen during the migration. It leverages design goals, processes, and procedures developed during prior activities; and documents how the migration activities will occur.
- 4.2.2.2.11.2 The Detailed Design Solution should incorporate extensive design documentation, including:
 - a. Design diaries detailing original design decisions and rationale and documenting changes made to the design over time
 - b. Introductory, non-technical design descriptions which can be understood by senior management, staff, and other stakeholders
 - c. Descriptions of redesigned or newly designed business processes
 - d. Proof of Concept outcomes
 - e. Logical and physical models of different aspects of the system
 - f. Metadata specifications
 - g. Structured, precise hardware and software design specifications aimed at computer system developers and

vendors (third party products that may need to be updated and why)

- h. Skeletal system implementation plan
- i. Pre-migration Tasks
- j. Migration Tasks
- k. Post-migration tasks
- l. Initial testing plans
- m. Initial training plans

4.2.2.3 Build and Test:

- 4.2.2.3.1 When the Detailed Design Solution has been completed or modified and signed off by RCRMC, the process of building the environment necessary to properly test migration can begin. This activity is essentially a validation of the DDS document. Tasks will need to be identified to prepare the infrastructure and implement the necessary migration tools.
- 4.2.2.3.2 The process of testing the migration design, the tools, and procedures associated with the migration, consolidation, and conversion of any existing data, such as security settings, permissions and privileges, application related data, profiles, scripts, databases, mailboxes, public folders, end user data, etc., to the new infrastructure will be system tested, validated, and refined as necessary.
- 4.2.2.3.3 All documentation will be updated accordingly and as needed based on the build and test process.
- 4.2.2.3.4 The Build and Test processes are part of an iterative design, build, and test process. During each iteration; the design is built and tested, the results are used to refine the design, and the design is built and tested again. This iterative process continues until the design is complete. It is vitally important that the iterative nature of the design, build, and test process is fully understood and followed since it is crucial to the design success.
- 4.2.2.3.5 Once the Detail Design Solution has passed all tests and the documentation is complete a Detailed Migration Plan will need to be finalized. This plan will be based on the information from the DDS and will identify all necessary tasks to perform and implement the DDS during the migration phase.
- 4.2.2.3.6 Acceptance tests are formal tests conducted to determine whether a system satisfies the scope and requirements of the project. RCRMC will signoff on these thus allowing for the migration schedule to be finalized.
- 4.2.2.3.7 **Signoff - Build and Test:**
RCRMC will be required to signoff on the Detail Design Solution, Detail Migration Plan, and Master Test Plan prior to moving into the next stage. Once signed off, each of these documents will be considered final and no changes will be allowed.
- 4.2.2.3.8 **Deliverables - Build and Test:**
 - 4.2.2.3.8.1 Finalized Detailed Migration Design with complete

documentation.

- 4.2.2.3.8.2 Finalized Detailed Migration Plan with complete documentation. Detailed Migration Plan describes the implementation activities for the migration, the migration schedule and milestones, resource requirements, escalation procedures, rollback scenarios, test plans and processes, documentation and operations requirements, etc.
- 4.2.2.3.8.3 The Detailed Migration Plan is a complete road-map that will be used to complete the migration and the following general areas should be considered during the development of the Detailed Migration Plan:
 - a. Describe logistics and schedule
 - b. Describe the final migrated infrastructure
 - c. Identify key components (Server and Client)
 - d. Describe how each component will be migrated
 - e. Describe rollback procedures
 - f. Identify migration dependencies and requirements
 - g. Identify migration support (Who, When, Where, What)
 - h. Identify Service Level Agreements (What is currently in place)
 - i. Identify escalation procedures (Who will do what when issues occur)
 - j. Identify established communication procedures
 - k. Verify training has been completed
 - l. Verify facilities have been procured
 - m. Identify risks (and mitigation options)
- 4.2.2.3.8.4 **Master Test Plan**
 - 4.2.2.3.8.4.1 The Master Test Plan describes in detail how the required key components will be tested and deployed, making reference to activities in the Detailed Design Solution and Detailed Migration Plan documents where relevant.
 - 4.2.2.3.8.4.2 Each test plan associated with the Master Test Plan is a composite deliverable that includes:
 - a. Test Approach and Goals - explains the objectives and scope of the test, entry and exit criteria, resources, and key dates.
 - b. Test Scenarios - explain what needs to be tested and how to carry out the test at a high level.
 - c. Test Procedures - detail the exact steps that a tester must follow to complete testing.

4.2.2.4 Migration Activities:

- 4.2.2.4.1 Migration into the production environment is the next logical step required by this RFP. After the completion of this process, the production environment will be supported by the RCRMC operations team.
- 4.2.2.4.2 This is an opportunity for both the vendor and RCRMC to review all the documentation and address any final questions before the hand-off to the RCRMC operations team. This review will also highlight any areas of the infrastructure that will need to be monitored by the RCRMC operations team.
- 4.2.2.4.3 After this, the final Detailed Design is deployed to the production environment and tested. End users and all applicable data are migrated, and packaged applications are installed and configured. End user training is ongoing and completed once deployment activities are finished. Interim operational support is continued to ensure deployment success and transition activities are initiated at deployment completion to bring the stage to an end.
- 4.2.2.4.4 Key activities in this stage:
 - a. Deploy the production Detailed Design Solution
 - b. Test production infrastructure based upon the Master Test Plan
 - c. Deploy and test applications in production
 - d. Migrate user data and related items
 - e. Continue interim operational support
 - f. Transition interim operational support to the RCRMC operations team
 - g. Transfer deliverables and other project outputs
 - h. Continue communication across all channels
- 4.2.2.4.5 An agreed upon defined milestone task will trigger RCRMC to meet with the vendor, all parties should agree that the performance of the solution is consistent with the objectives of the project, and the technology is ready to be handed over to the RCRMC operations team. Once the operations team has accepted the technology from the vendor, the vendor will no longer be directly responsible for problem escalations; however, the vendor will provide support to the operations team for problem escalation and resolution for a period of two weeks after the migration is completed.
- 4.2.2.4.6 The Interim Operational Support activity involves providing support services for the production infrastructure during the acceptance testing and until the support responsibilities are transitioned to the RCRMC operations team.
- 4.2.2.4.7 Vendor personnel may have been performing vital implementation, migration, support, and operational roles during the project. It is likely that key information was discovered and that valuable operational experience was developed during the project. This information, along with all active roles, must be transferred.

4.2.2.4.8 Deliverables - Migration Activities:

- 4.2.2.4.8.1 The Phase 2 Acceptance Letter - The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this phase. A review of and detailed listing the Scope of Work Deliverables and High Level Requirements will be referenced in the Project Acceptance Letter.
- a. Document and review key information
 - b. Identify RCRMC resources to replace vendor resources
 - c. Provide an open forum for communication
 - d. Consider one-on-one meetings, Question and Answer sessions, structured meetings, and side-by-side operations
 - e. Transfer final deliverables as part of the transition
 - f. The transition activities are part of the project acceptance criteria

4.3 Phase 3 - Migration from Novell GroupWise to Microsoft Exchange

4.3.1 Migration from Novell GroupWise environment to Microsoft Exchange 2007 environment. This migration will need to include all services currently provided through Novell GroupWise. The implementation will need to provide a secure, well documented Exchange environment suitable for RCRMC. Development of group policies, procedures, and standards that is suitable to support and maintain the final Detail Design Solution.

- a. To implement a secure, well documented Exchange environment, as well as the migration of all user accounts including email, calendars, task, contacts, and notes.
- b. To develop group policies, procedures, and standards suitable for RCRMC.
- c. Develop a migration plan with specific objectives and timeline for the move of RCRMC's current Novell GroupWise environment to Microsoft Exchange 2007. Also, develop as part of this plan the capability to roll back or run in parallel to the existing Novell GroupWise in the event that a catastrophic problem is encountered during the migration process.
- d. Ensure that during the migration process that critical applications are still operating correctly after the migration. Minimizing user, application, and server impact during the migration is of the utmost importance.
- e. Configure the new Exchange environment to operate within the Phase 2 Active Directory.
- f. Establish processes and standards for adding and maintaining remote locations and remote users.
- g. Establish a Web Access for electronic mail retrieval.
- h. Provide initial support for the implementation of client access to the new email system, with the goal of RCRMC IT technical staff completing an automated rollout of any client pieces and/or Microsoft Outlook to the desktop.
- i. Provide support and informal phone mentoring for two weeks at no cost following implementation.

4.3.2 RCRMC has the expectation that at a minimum the selected vendor will perform the following during the Analysis, Design, Built/Test, and Migration processes:

4.3.2.1 Analysis:

- 4.3.2.1.1 Using the initial High Level Requirements (provided to selected vendor by RCRMC) and taking the information from Phase 1, perform an assessment

and identify gaps and all migration issues. Create a conceptual migration design by providing more detailed logical and functional technical specifications to the set of core infrastructure and operational components and processes that are in scope. During the design process, more concrete decisions about system components, such as how they are constructed, what are their functions, how are they used, where are they placed, and how they are integrated will be addressed.

4.3.2.1.2 Migration is critical to success. Without well tested migration paths, new solutions can fail because legacy components introduce risks that were never accounted for during planning.

4.3.2.1.3 The objectives of this phase are:

4.3.2.1.3.1 Identify and mitigate all risks discovered during Phase 1.

4.3.2.1.3.2 To divide the migration activities into smaller, more manageable components, with well defined tasks, this can then be addressed separately

4.3.2.1.3.3 To finalize basic design decisions about the overall migration solution and, thus, confirms the High Level Requirements

4.3.2.1.4 During the analysis process it is our expectation that the selected vendor will validate our High Level Requirements and will make recommendations; However, Based upon the Analysis of Phase 1, RCRMC may find it necessary to modify the High Level Requirements in order to meet the Hospital Information Services (HIS), regulatory, functionality, or other requirements. RCRMC will modify the High Level Requirements documentation as required.

4.3.2.2 Guidelines

4.3.2.2.1 The following general areas should be considered when performing the Analysis:

- a. Type of migration - Upgrade, restructure or pristine (parallel) environment
- b. Automated vs. manual deployment process
- c. What tools? (including scripts)
- d. Size of migration
- e. Coexistence requirements
- f. Decommissioning of replaced resources
- g. Rollback
- h. Pre-migration and post-migration tasks
- i. Support and end user readiness

4.3.2.2.2 The following identified components need to take into consideration as part of the migration project:

- a. Data - user data, application data, profiles, databases, mailboxes, PDAs, etc.
- b. Network - Domain Name System (DNS), Windows Internet Name Service (WINS), Virtual Private Network (VPN)/Remote Access

- c. Directory Services - users, computers, groups, schema, policies
- d. Security - Access Control Lists (ACLs), templates, user rights assignments, Public Key Infrastructure (PKI)
- e. Server - Operating System (OS) servers, Messaging and Collaboration servers, Change and Configuration Management servers, etc.

4.3.2.3 Signoff:

Once the High Level Requirements have been confirmed, RCRMC will signoff on them thus establishing the finalized scope of the project. Once signed off, the Design process can begin.

4.3.2.4 Deliverables - Analysis:

4.3.2.4.1 The Requirements Definition Document (RDD):

- 4.3.2.4.1.1 The purpose of this document is to gain an understanding of the changes to the current business processes and technology that will be required to support the goals, expectations, and high level requirements of the new solution.
- 4.3.2.4.1.2 Current application capabilities are compared against the goals, expectations, and high level requirements for the new solution. Possible analysis could indicate when a new component or suite of components of the solution is needed. Also it could indicate that an existing application or product needs to be updated, or no change/migration is required. Examples of changes include the following:
 - a. Functional changes
 - b. Data migration
 - c. User migration
 - d. Interface or communication changes
- 4.3.2.4.1.3 Likewise, the current operational infrastructure is examined to determine what is needed to enable the new capability. Changes or enhancements to the operational infrastructure may include:
 - a. Transaction workload
 - b. Network capacity
 - c. Communications speed, reliability, security
 - d. Physical compatibility
 - e. Servers consolidation
- 4.3.2.4.1.4 The following represent the minimum items to be evaluated and documented in the RDD:
 - a. Systems/applications. Determine which systems/applications can be migrated or possibly decommissioned (i.e. custom calendaring, custom dictionary, custom interfaces, etc...)

- b. Determine how users, groups, objects, folders, files, databases, and e-mail systems (GroupWise or others) will be affected
- c. Issues discovered during phase 1 that will require special attention during the migration.
- d. Directly address all gaps and issues discovered during Phase 1

4.3.2.5 Design:

- 4.3.2.5.1 The Design stage focuses on creating a Detailed Design Solution (DDS), built upon the Requirements Definition Document (RDD).
- 4.3.2.5.2 The overall objective of this process is to identify the viable migration options and tools that are available, and to develop the best approach based on the project scope, goals, and approved requirements. Emphasis should be placed on developing an approach that is as efficient and seamless as possible, with little or no interruption to users, the network, other systems, or to the business.
- 4.3.2.5.3 The Design stage is the beginning of an iterative process that will allow for all assumptions to be proven (Proof of Concept (POC) described below), built, and tested. All assumptions will need to be documented clearly in the DDS along with the outcome of each POC.
- 4.3.2.5.4 With the migration to new technology, there is a chance that existing business, office productivity, and other applications may be impacted. The developed migration approach will need to address this by planning tasks designed to help ensure each application is identified, categorized, and prioritized so that testing and remediation tasks can be executed in later activities to ensure compatibility with the proposed infrastructure change.
- 4.3.2.5.5 Depending on the number of applications and the test approach, application testing may require considerable cooperation from various business units and application owners. Tasks will need to be added to identify the application stakeholders early in the project and lobby to get them involved to review and approve the test plans or to commit resources to an agreed upon level.
- 4.3.2.5.6 The migration design must address the processes and tasks for operations support to ensure that the new infrastructure can be properly supported and managed. RCRMC committed to the principles of the Microsoft Operations Framework (MOF). This activity focuses on the technology, organization, and process aspects of operations. While these tasks will focus of the operations architecture to support the runtime or production environment, the test environments used throughout this project should be considered in scope as well. It is critical that all of the existing infrastructure and operations processes be understood, as the impact of the new infrastructure will affect the operations staff and will provide RCRMC a clear understanding on how each of the existing Service Level Agreements (SLAs) will be clearly assessed.

- 4.3.2.5.7 Development Test Plans. These tasks will define and document in the DDS the types of testing to be performed, outline high level test scenarios for each test type defined, and to create high level test plan outlines that the project team will leverage in later stages of the project. Test plans are outlined as the logical design is completed, migration and application remediation approaches are developed, and operations processes and the support model are defined. The high level test plans will be based on completed project approach, the logical design, as well as the functional and technical requirements. In later stages, test cases for each test type will be executed in a thorough testing activity designed to ready the system for release.
- 4.3.2.5.8 It is the vendor responsibility to provide necessary tools as part of the proposal. If alternative exists to provide potential savings to RCRMC, bidders should be clearly stated in their response.
- 4.3.2.5.9 Proof of Concept (POC):
- 4.3.2.5.9.1 A technical risk is one that threatens the technical correctness of the solution. In other words, some part of the proposed solution may be impossible to develop with existing technology or may not meet the requirements. Designers, at the time of designing, might not know whether the particular configuration is viable. If they don't know and don't have time to determine viability, but assume that the configuration will work, then there is a technical risk.
- 4.3.2.5.9.2 Technical risks are by far the easiest to handle, because they are, after all, only technical problems, the answers to which are not currently known. Technical risks are determined by performing a set of exploratory actions. This should be done preferably as early in the life of the project as possible by development of proof-of-concept prototypes.
- a. RCRMC is requiring that all identified risks/assumptions/unknowns to be documented in the DDS and that a POC must be completed to address each issue. The outcome of each POC must also be documented in the DDS.
- b. RCRMC will work closely with the vendor to ensure that all Design decisions are viable.

4.3.2.6 Signoff:

Once the Detail Design Solution document has been created/modified, RCRMC will signoff on the assumptions and approach thus establishing the baseline for the vendor to build and test against. Since the Design stage is part of an iterative process RCRMC will be required to signoff on each iteration prior the Detail Design Solution document moving into the Build/Test stages.

4.3.2.7 Deliverables - Design:

4.3.2.7.1 Detailed Design Solution, at a comprehensive level, describes what will happen during the migration. It leverages design goals, processes, and procedures developed during prior activities; and documents how the migration activities will occur.

4.3.2.7.2 The Detailed Design Solution should incorporate extensive design documentation, including:

- a. Design diaries detailing original design decisions and rationale and documenting changes made to the design over time
- b. Introductory, non-technical design descriptions which can be understood by senior management, staff, and other stakeholders
- c. Descriptions of redesigned or newly designed business processes
- d. Proof of Concept outcomes
- e. Logical and physical models of different aspects of the system
- f. Metadata specifications
- g. Structured, precise hardware and software design specifications aimed at computer system developers and vendors (third party products that may need to be updated and why)
- h. Skeletal system implementation plan
- i. Pre-migration Tasks
- j. Migration Tasks
- k. Post-migration tasks
- l. Initial testing plans
- m. Initial training plans

4.3.2.8 Build and Test:

4.3.2.8.1 When the Detailed Design Solution has been completed/modified and signed off by RCRMC, the process of building the environment necessary to properly test migration can begin. This activity is essentially a validation of the DDS document. Tasks will need to be identified to prepare the infrastructure and implement the necessary migration tools.

4.3.2.8.2 The process of testing the migration design, the tools, and procedures associated with the migration, consolidation, and conversion of any existing data, such as security settings, permissions and privileges, application related data, profiles, scripts, databases, mailboxes, public folders, end user data, etc., to the new infrastructure will be system tested, validated, and refined as necessary.

4.3.2.8.3 All documentation will be updated accordingly and as needed based on the build and test process.

4.3.2.8.4 The Build and Test processes are part of an iterative design, build, and test process. During each iteration the design is built and tested, the results are used to refine the design, and the design is built and tested again. This iterative process continues until the design is complete. It is vitally important that the iterative nature of the design, build, and test process is fully understood and followed since it is crucial to the design success.

4.3.2.8.5 Once the Detail Design Solution has passed all tests and the

documentation is complete a Detailed Migration Plan will need to be finalized. This plan will be based on the information from DDS and will identify all necessary tasks to perform and implement the DDS during the migration phase.

- 4.3.2.8.6 Acceptance tests are formal tests conducted to determine whether a system satisfies the scope and requirements of the project. RCRMC will signoff on these thus allowing for the migration schedule to finalize.

4.3.2.9 Signoff:

RCRMC will be required to signoff on the Detail Design Solution, Detail Migration Plan, and Master Plan prior to moving into the next stage. Once signed off, each of these documents will be considered final and no changes will be allowed.

4.3.2.10 Deliverables - Build and Test:

- 4.3.2.10.1 Finalized Detailed Migration Design with complete documentation.
- 4.3.2.10.2 Finalized Detailed Migration Plan with complete documentation. Detailed Migration Plan describes the implementation activities for the migration, the migration schedule and milestones, resource requirements, escalation procedures, rollback scenarios, test plans and processes, documentation and operations requirements, etc.
- 4.3.2.10.3 The Detailed Migration Plan is a complete road-map that will be used to complete the migration and the following general areas should be considered during the development of the Detailed Migration Plan:
- a. Describe logistics and schedule
 - b. Describe the final migrated infrastructure
 - c. Identify key components (Server and Client)
 - d. Describe how each component will be migrated
 - e. Describe rollback procedures
 - f. Identify migration dependencies and requirements
 - g. Identify migration support (Who, When, Where, What)
 - h. Identify Service Level Agreements (What is currently in place)
 - i. Identify escalation procedures (Who will do what when issues occur)
 - j. Identify established communication procedures
 - k. Verify training has been completed
 - l. Verify facilities have been procured
 - m. Identify risks (and mitigation options)
- 4.3.2.10.4 Master Test Plan
The Master Test Plan describes in detail how the required key components will be tested and deployed, making reference to activities in the Detailed Design Solution and Detailed Migration Plan documents where relevant.
- 4.3.2.10.5 Each test plan associated with the Master Test Plan is a composite deliverable that includes:
- a. Test Approach and Goals - explains the objectives and scope of the test, entry and exit criteria, resources, and key dates.
 - b. Test Scenarios - explain what needs to be tested and how to carry out the test at a high level.
 - c. Test Procedures - detail the exact steps that a tester must follow to

complete testing.

4.3.2.11 Migration Activities:

- 4.3.2.11.1 Migration into the production environment is the next logical step required by this RFP. After the completion of this process the production environment will be handed to the RCRMC operations team.
- 4.3.2.11.2 This is an opportunity for both the vendor and RCRMC to review all the documentation and address any final questions before the hand-off to the RCRMC operations team. This review will also highlight any areas of the infrastructure that will need to be monitored by the RCRMC operations team.
- 4.3.2.11.3 After this, the final Detailed Design is deployed to the production environment and tested. End users and all applicable data are migrated, and packaged applications are installed and configured. End user training is ongoing and completed once deployment activities are finished. Interim operational support is continued to ensure deployment success and transition activities are initiated at deployment completion to bring the stage to an end.
- 4.3.2.11.4 Key activities in this stage:
 - a. Deploy the production Detailed Design Solution
 - b. Test production infrastructure based upon the Master Test Plan
 - c. Deploy and test applications in production
 - d. Migrate user data and related items
 - e. Continue interim operational support
 - f. Transition interim operational support to the RCRMC operations team
 - g. Transfer deliverables and other project outputs
 - h. Continue communication across all channels
- 4.3.2.11.5 An agreed upon defined milestone task will trigger RCRMC to meet with the vendor, all parties should agree that the performance of the solution is consistent with the objectives of the project, and the technology is ready to be handed over to the operations team. Once the operations team has accepted the technology from the vendor, the vendor will no longer be directly responsible for problem escalations; however, the vendor will provide support to the operations team for problem escalation and resolution for a period of two weeks after the migration is completed.
- 4.3.2.11.6 The Interim Operational Support activity involves providing support services for the production infrastructure during the acceptance testing and until the support responsibilities are transitioned to the RCRMC operations team.
- 4.3.2.11.7 Vendor personnel may have been performing vital implementation, migration, support, and operational roles during the project. It is likely that key information was discovered and that valuable operational experience was developed during the project. This information, along with all active roles, must be transferred.

4.3.2.12 **Deliverables - Migration Activities:**

The Phase 3 Acceptance Letter

The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this Phase. A review of and detailed listing the Scope of Work Deliverables and High Level Requirements will be referenced in the Project Acceptance Letter.

- a. Document and review key information
- b. Identify RCRMC resources to replace vendor resources
- c. Provide an open forum for communication
- d. Consider one-on-one meetings, Question and Answer sessions, structured meetings, and side-by-side operations
- e. Transfer final deliverables as part of the transition
- f. The transition activities are part of the project acceptance criteria

4.4 **Phase 4**

4.4.1 **Implementation assistance with planning, requirements, and setup of workstations migration / upgrade / replacement.**

4.4.1.1 The objective of this activity is to prepare and assist the RCRMC with the development of a migration plan that will be used in the setup/upgrade/replace of a sub-selection of workstations and portal devices used by the end users. The vendor will be responsible for assisting with the enactment of this plan, and will assist by providing oversight and identifying areas of contention based on the decisions and choices made during the completion of the DDS. RCRMC will provide the vendor with a set of HIS hardware requirements and using this information along with information from Phases 1, 2, and 3, the vendor will provide a hardware configuration that RCRMC will use to procure or upgrade additional hardware. This assistance will allow for a more structured migration of the end user hardware to the production environment and will validate and refine the migration process.

4.4.1.2 The vendor will be able to provide feedback about how features work and the appropriate methods that will meet the defined standards. RCRMC will use this feedback to resolve any issues or to create a contingency plan. The feedback can also help determine the level of support needed after full deployment.

4.4.1.3 Upon receiving the hardware and/or components, vendor will assist with the rollout of solution to the individual user work areas.

4.4.1.4 The vendor will provide installation and onsite support in compliance with the Detailed Design specifications from Phase 2 and Phase 3. The vendor will install the server and workstation equipment at the RCRMC specified locations in a first class workmanlike manner and in accordance with all applicable Federal, State and Local Safety Codes. Installation will consist of un-boxing the unit and components, inspecting for shipping damage, and discarding packaging materials in RCRMC specified location. The unit(s) will be situated in the appropriate user workspace. All interface and hardware options will be installed and necessary power and data cables will be attached.

4.4.1.5 Power-on self-tests will be performed and the appropriate software tested. All usable interfaces will be tested for proper operation by connecting to a known operational network connection, and the appropriate logical attachment, ping, or loop tests will be performed. Network addresses and interface parameters previously agreed upon by the vendor and RCRMC will be configured in the equipment. Written documentation of all

configuration and software parameters will be recorded and provided to RCRMC assigned representative.

4.4.1.6 All vendor controlled installation, system design, and training personnel involved in this project shall be certified on the proposed system and software release.

4.4.2 Deliverables - Phase 4:

4.4.2.1 Resources assignment and skill sets

4.4.2.2 Migration plan and schedule

4.4.2.3 Phase 4 Acceptance Letter

4.4.2.3.1 The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this Phase. A review of and detailed listing the Scope of Work Deliverables and High Level Requirements will be referenced in the Project Acceptance Letter.

4.5 Phase 5 –

4.5.1 Provide training to end users

4.5.1.1 The end users will be scheduled for training on a daily basis, based on priorities set by the organization. There may be varying forms of training provided based on user type and experience level. Consider the following additional areas as training proceeds:

- a. On-site training at RCRMC
- b. Develop a class attendance methodology and provide reports
- c. Provide a class feedback mechanism to determine what works best with the class and what needs to change
- d. Ensure the physical training environment reset procedures work as designed
- e. Computer Based Training (CBT) or Web Based Training (WBT), provide a monitoring and support mechanism

4.5.1.2 If this is not a core competency of your organization, please provide complete information on sub-contractor that will be used for this RFP.

4.5.2 Deliverables – Phase 5:

4.5.2.1 Training curriculum (i.e. Exchange, new environment, etc...)

4.5.2.2 Training plan and schedule (i.e. normal business hours, after business hours, weekends, and makeup sessions)

4.5.2.3 Training database (i.e. tracking attendance, completed courses, feedbacks, improvements)

4.5.2.4 Training Schedule will to cover a period of 30 calendar days with sessions available for normal business hours, after business hours, and weekend time schedules. Schedules will need to be made available to RCRMC two (2) months prior to the scheduled migration completion of Phase 2 and Phase 3. RCRMC will publish the schedule internally; however the vendor will be responsible for booking and record keeping in accordance with the training.

4.5.2.5 Phase 5 Acceptance Letter. The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this Phase.

4.6 Phase 6 –

4.6.1 Provide training to Technical Staff

The technical staff has the responsibility of operating and supporting the system after it is deployed. The technical staff should be trained prior to deployment and they should gain experience with the system using the test lab and other environments created during the

design/build/test. The type of training the IT staff will receive is should be outlined in a Training Plan. Whatever the type of training, appropriate, uninterrupted time must be allocated to facilitate the learning process and these tasks need to be clearly identified on the project plan.

4.6.2 Deliverables – Phase 6:

4.6.2.1 Training curriculum - RCRMC Active Directory environment

4.6.2.2 Training curriculum – RCRMC Exchange environment

4.6.2.3 Training curriculum – Systems and End-Users Support for Daily Operations

4.6.2.4 Training plan and schedule (i.e. normal / off business hours, makeup sessions)

4.6.2.5 Training database (i.e. tracking attendance, completed courses, feedbacks, improvements)

4.6.2.6 During the scheduled training, the bidder will train RCRMC technical supporting staff to create, build, and modify necessary Operations Guides that will be utilized to support RCRMC daily operations. These Guides will utilize the artifacts from the previous Phases.

4.6.2.7 Phase 6 Acceptance Letter. The Acceptance Letter serves to formally gain acceptance and a sign-off from RCRMC against all contractual obligations detailed in the Contract for this Phase.

4.7 Optional: Proposal for Managed Services for IT Service Operations

4.7.1 RCRMC would like to receive cost estimates managed services for IT service operations in supporting of the new environment. The managed services for IT Services Operations should be in compliance with Information Technology Infrastructure Library (ITIL) version 3 framework that focuses on service operation and service improvement (i.e. Change Management, Service Asset and Configuration Management, Release and Deployment Management, Request Fulfillment, Incident Management, Problem Management, Event Management, Service Desk Function, Service Measurement, Service Reporting).

4.7.2 Examples of the managed service areas, but not limit to, are servers (OS and applications), SANS environment, enterprise tape backup, Microsoft Active Directory, Microsoft Exchange, thin client environment (Citrix), and virtualization environment (VMware). Bidders can exclude the network infrastructure (routers, switches, and firewalls) area from their proposal.

4.7.3 Bidders should design the managed service structure with flexibility, provide the time frame required to provide such services, and provide a cost breakdown so RCRMC can select as needed:

- a. Services Desk Function Activities
- b. Service Operations Activities
- c. Service Improvement Activities

4.7.4 Bidders can use the following Service Level Agreement (SLA) guidelines as part of their proposal:

Table 1

Definition of Severity Levels	
Severity 1	Critical - Impact on patient care. 25% or more users are affected.
Severity 2	Major - Impact on patient care. 5% or more users are affected.
Severity 3	Minor - Operational performance of network is impaired.
Severity 4	Service request - MAC

Table 2

Incident Response and Resolution SLR (Service Level Requirement)			
Incident Type	Service Measure	Performance Target	SLR
Severity 1	Time to Respond	15 Minutes	100%
	Time to Resolve	2 Hours	100%
Severity 2	Time to Respond	30 Minutes	95%
	Time to Resolve	4 Hours	95%
Severity 3	Time to Respond	1 Hours	90%
	Time to Resolve	8 Hours	90%
Severity 4	Time to Respond	4 Hours	90%
	Time to resolve	2 Business days	80%

4.7.5 Bidders must provide the different cost options as outlined below for the managed services (year 1, year 2, year 3, year 4, and year 5):

Option 1: 7x24x365 On-Site Support Model

Option 2: 7x24x365 Hybrid Support Model (on-site, on-call, and remote monitoring)

Option 3: 6am-6pm 7x365 On-Site and 6pm-6am 7x365 On-Call Support Model

Notes: Further refinement of the SLA, especially on patient care and affected areas within hospital, will be discussed with the selected vendor.

4.8 Out of Scope:

4.8.1 The following items will be deemed Out of Scope for this RFP:

4.8.1.1 This RFP makes references to network hardware, network environment, Novell environment, and Microsoft environment. All of these references will include all hardware attached to or referenced through any network appliance except for the following items: Switches, Routers, and Firewalls appliances.

4.8.1.2 Any hardware that is dedicated to or part of RCRMC's current backend application migration including:

- a. Impac
- b. Wyndgate
- c. Radiology (Syngo)
- d. Pharmacy
- e. Lab (Novius)
- f. EDM / HIM
- g. Openlink
- h. Data Innovation
- i. EMC SAN (Symmetrix DM4-950)
- j. NextGen

5.0 WORK PRODUCT

5.1 Reports shall be submitted no later than 5/21/09 with six copies (one original with soft copy, and five copies).

5.2 All work papers prepared in connection with the contractual services will remain the property of the successful bidder; however, all reports rendered to the County are the exclusive property of the County and subject to its use and control.

6.0 TIMELINE		DATES:
1. RELEASE OF REQUEST FOR PROPOSAL		April 15, 2009
2. DEADLINE FOR SUBMISSION OF QUESTIONS Email: rhai@co.riverside.ca.us		Must be in the form of an Email by 1:30 PM on: April 29, 2009
3. MANDATORY BIDDERS MEETING 26520 Cactus Avenue, Moreno Valley, CA 92555 Conference Room B and Room C		April 29, 2009 at 1:00 PM
4. DEADLINE FOR PROPOSALS		May 21, 2009 1:30 PM
5. TENTATIVE DATE FOR AWARDED RFP Approximately 30 to 120 days after the RFP closes.		The Bidders are responsible for checking the Purchasing website for notice of intent to award at: www.Purchasing.ca.riverside.ca.us

7.0 PERIOD OF PERFORMANCE

The period of performance shall be for five year(s), renewable in one-year increments, with the completion date of June 30, 2014, with no obligation by the County of Riverside to purchase any specified amount of services.

8.0 PROPOSAL SUBMITTAL

All proposals shall be signed by an authorized agent and placed in a sealed package clearly marked "Bidder Proposal." The submitted proposal shall be prepared in a bound notebook(s). **One (1) original and five (5) additional copies, each in a 3 ring binder, and one (1) (Microsoft Word or PDF document formatted on a virus free CD or flash drive), shall be submitted. Faxed or emailed proposals will not be accepted.**

ALL BIDS MUST BE SENT TO: County of Riverside
Purchasing and Fleet Services
Attention: Rick Hai
RFP# MCARC-106
2980 Washington Street
Riverside, CA 92504-4647

9.0 GENERAL REQUIREMENTS

Procedures for Submitting Proposals

- 9.1. All proposals must be submitted in accordance with the standards and specifications contained within this Request for Proposal (RFP) and must contain a cover page with a certification of intent to meet the requirements specified.
- 9.2. The cover page of a responsive bid must be signed appropriately and completed with the date, company name, and name and title of a company officer/owner authorized to sign on behalf of the company.
- 9.3. The County reserves the right to waive, at its discretion, any irregularity, which the County deems reasonably correctable or otherwise not warranting rejection of the proposal.
- 9.4. The County shall not pay any costs incurred or associated in the preparation of this or any proposal or for participation in the procurement process.
- 9.5. Modification of Proposals, any bidder who wishes to make modifications to a proposal already received by the County must withdraw his/her proposal in order to make the modifications. All modifications must be made in ink, properly initialed by bidder's authorized representative, executed, and submitted in accordance

with the terms and conditions of this solicitation. It is the responsibility of the bidder to ensure that modified proposals are resubmitted before the RFP submittal deadline of May 21, 2009.

9.6. Bidders may withdraw their proposals at any time prior to the due date and time by submitting notification of withdrawal signed by the bidder's authorized agent. Proposals cannot be changed or modified after the date and time designated for receipt.

9.7. Proposals must be typed uniformly on letter size (8 ½ " x 11") sheets of white paper, single sided, each section clearly titled, with tabs A-K, and each page clearly and consecutively numbered. Proposals must be clean and suitable for copying. Proposals must be specific unto themselves. For example, "See *Enclosed Manual*" will not be considered an acceptable proposal. Receipt of all addenda, if any, must be acknowledged in the proposal.

9.8. **Late proposals will not be accepted.** Postmarks will not be accepted in lieu of this requirement. Proposals submitted to any other County office will be rejected.

9.9. The proposal shall be concise and to the point. Costly bindings, color plates, glossy brochures, etc. are neither necessary nor recommended. Examples of previous work may be submitted but will not necessarily influence the evaluation process. A letter format in sufficient detail to allow thorough evaluation and analysis is required.

10.0 REQUIRED FORMAT OF PROPOSALS

Proposals must contain the following sections:

- A. Proposal Cover Page (Page 4 of this RFP)
- B. Table of Contents
- C. Corporate/Company/Agency Profile
- D. Description of Services
- E. Cost Proposal
- F. Credentials/Resumes/Certifications/Licenses
- G. Bidder's Qualifications
- H. References
- I. Evidence of Insurability/ Business Licenses
- J. Financial Information
- K. Clarification/Exceptions/Deviations

A. Proposal Cover Page

The Proposal Cover Page (page 4 of this RFP) must be signed by an authorized representative. Signature by an authorized representative of the organization on the proposal cover page shall constitute a warranty, the falsity of which shall entitle the County of Riverside to pursue any remedy authorized by law, which shall include the right, at the option of the County of Riverside, of declaring any contract made as a result thereof, to be void.

B. Table of Contents

This section shall include a comprehensive table of contents that identifies material by sections A – K (in the order list above) and by sequential page numbers.

C. Corporate Profile

This section of the proposal is designed to establish the bidder as an entity with the ability and experience to operate the program as specified in the RFP. The Company Profile should be concise and clear, and include descriptive information regarding service delivery. The following information must be provided as follows:

1. Business name and legal business status (i.e., partnership, corporation, etc.);
2. Proof of non-profit status, if applicable;
3. Company overview of services or activities performed, include:
 - a. The history of the bidder's firm- includes a brief history of the firm.
 - b. The number of years in business under the present business name, as well as prior business names.
 - c. Number of years experience providing the proposed, equivalent, or related services.
 - d. Company hierarchy (President, Vice President, Company Officers, etc.) and organizational chart. Organizational chart shall clearly identify all positions that are being proposed to be funded under the project.
 - e. Company size - number of staff, proposed number of staff to provide services, and participant base.
 - f. Location of the office from which the work under this contract will be provided and the staff allocation at that office.
4. Whether the bidder holds controlling or financial interests in any other organization, or is owned or controlled by any other person or organization, if none that must be stated.

D. Description of services

All proposals must include a detailed description of the services to be rendered, including but not limited to the following:

1. A written general understanding to the requirements in the scope of services as detailed in the RFP, Appendix A, Section 3.0 and Section 4.0, including:
 - a. Provide a comprehensive narrative that illustrates bidder's understanding of the purposed scope, objectives, and requirements of the project. Identify any challenges associated with implementing this work.
 - b. Provide a comprehensive narrative that illustrates bidder's understanding of Current Environment.
 - c. Provide a work plan or description of how the work will be performed. Provide a detailed, comprehensive narrative that sets out the methodology bidder intent to employ, and demonstrate how bidder's methodology will serve to accomplish the scope of work and achieve RCRMC objectives. Discuss any operational plan, problem solving approaches, techniques, standards, or creative methods to be used for getting the job done. Include the proposed project schedule and timeline, which identifies major tasks and project milestones. Be specific about how bidder will provide the training that will be required to allow RCRMC IT staff to maintain the system that bidder will design along with training that will allow the user community to be productive with the new Exchange migration.
 - d. Provide a comprehensive narrative of bidder's Project Methodology/Delivery Management/Change Control Process.
 - e. Describe how this project will fit into bidder overall organizational structure.
 - f. Describe bidder's management approach to potential contractual dispute.
 - g. Give precise detail on your project reporting mechanisms. Include:
 - i. A complete description of how the interaction between the bidder's company and the County will take place to ensure that the services are performed and to the County's satisfaction, including resolving problems that may be encountered during the project.
 - ii. Time of work- Detail time frame and phases of the work
 - iii. Describe the bidder's company policies regarding this project to ensure proper compliance and quality assurance.
 - iv. Provide the bidder's company safety regulations, policy and procedures.
 - v. Provide the bidder's company employee training.
 - vi. Provide the bidder's company background checking procedures and company utilized.

- f. Describe the bidder's technical capabilities for this service/project.
- g. Indicate whether or not the bidder will be subcontracting portion(s) of the work. If so, indicate the name of the subcontractor and the portion of the work, which will be subcontracted.
- h. Provide a sample invoice.

E. Cost Proposal

In this section, please complete and include the Cost Proposal Sheet attached as Exhibit A. Bidders may also include any other documents as information to further explain the proposed costs. Proposals must fully describe all costs to charges to County as part of this project. As stated in the Cost Proposal Sheet, bidders must provide fully inclusive blended rates, which include all of the bidders, project-related or supported expenses.

Describe how costs will be controlled and properly identified to the specific tasks, while providing a high quality of services, high level of integrity and outcomes.

F. Credentials/Resumes/Certifications/Licenses

This section shall state the person(s) responsible for administering or providing the services. Identify the project manager and include his/her position, responsibilities, qualification/experience, and a copy of his/her certification or licenses held if applicable.

Bidder shall specifically provide the following information on all employees to be providing service:

- Description of education;
- General experience;
- Experience or education related to the RFP project;
- Letters of reference if available;
- Any other information, which will assist in evaluating qualifications.

G. Bidder's Qualifications

This Section must demonstrate that the Bidder's organization has the experience and capability to provide the required software and services. The following information must be included:

1. Number of years Bidder's firm has been in business providing assessment, migration and training services as identified in this RFP. Sufficient documentation should be provided that the Bidder meet or exceeds Minimum Mandatory Requirements in Section 3.0.
2. Number of client firms that have engaged with the Bidder for similar services.
3. Name and brief resume of Bidder's project manager and project team, years of related experience and number of engagements providing similar services as outlined in this RFP.
4. Identify by name, case and court jurisdiction any pending litigation in which Bidder is involved, or judgments against Bidder in the past five (5) years. Provide a statement describing the size and scope of any pending or threatening litigation against the Bidder or principals of the Bidder.
5. Any other information relevant to the Bidder's capability to perform the assessment, migration, and training services should be included in this section.

H. References

All bidder(s) must include present (within the past twelve (12) months) and past performance (greater than the past twelve (12) months) information with a minimum of three (3) references (preferably Southern California). Each reference shall include:

1. A list of projects (of similar size & complexity) and previous work experience that demonstrate bidder's ability to administer or complete this project successfully.
2. Dates of work performed.
3. Current contact person, company, address, and email and telephone number for each reference identified.
4. Describe recent similar projects that are equivalent to the County. These experiences must show the qualifications of the bidder's capabilities to complete the County's requirements. Provide a summary of the scope of services performed for these other projects.

Please verify that all reference information is correct. References must clearly correlate their performance with the requirements of this RFP.

I. Evidence of Insurability/Business Licenses

All bidder(s) shall submit evidence of all required insurance. An Accord cover page will suffice and if awarded the contract the Bidder has ten (10) calendar days to produce the required insurances including a certified endorsement naming the County as additionally insured. The bidder shall certify to the possession of any and all current required licenses or certifications. Do not purchase additional insurance until this bid has been awarded. Copy of **current** business license or other applicable licenses.

J. Financial Statement

The bidder must submit financial statements (**balance sheet and income statement**) for its business that are dated no more than twelve (12) months prior to the date of the proposal submission and cover a period of at least one (1) year. These statements should clearly identify the financial status and condition of the bidder's entire business entity. Please place in a separate envelope and mark "Confidential" if your firm requires this to be kept confidential. The County does not guarantee that the financials submitted will be kept confidential.

K. Clarification, Exceptions or Deviations

All bidder(s) shall describe any exception or deviation from the requirements of the RFP. Each clarification, exception or deviation must be clearly identified. If your firm has no clarification, exception or deviation, a statement to that effect shall be included in this section. The following contractual terms are non-negotiable:

1. Indemnification
2. All insurance terms
3. Termination
4. Ownership/Use of Contract Materials and Products(If applicable)
5. Disputes
6. Governing Law

11.0 EVALUATION CRITERIA

Proposals may be evaluated based on the criteria listed below, to include but not limited to:

1. Overall responsiveness and general understanding of the RFP requirements,
2. Bidder's experience and ability.
3. Overall cost to the County.
4. The quantity and locations of facilities. (If applicable)
5. References with demonstrated success with similar work to the Scope of Service.
6. Technical capability and project methodology.
7. Financial status.
8. Clarification, Exceptions or Deviations.
9. Credential/Resumes/Licenses/Certifications.

12.0 EVALUATION PROCESS

All proposals will be given thorough review. All contacts during the review selection phase will be only through the Purchasing Department. Attempts by the Contractor to contact any other County representative may result in disqualification of the Contractor. All evaluation material will be considered confidential and not released by the County. The County reserves the right to split or make the award that is most advantageous to the County.

13.0 INTERPRETATION OF RFP

The Contractor must make careful examination and understand all of the requirements, specifications, and conditions stated in the RFP. If any Contractor planning to submit a proposal finds discrepancies in or omissions from the RFP, or is in doubt as to the meaning, a written request for interpretation or correction must be given to the County. Any changes to the RFP will be made only by written addendum. The County is not responsible for any other explanations or interpretations. If any provision in this agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

14.0 CONTRACTUAL DEVELOPMENT

If a proposal is accepted, the County will enter into a contractual agreement with the selected Contractor. A sample of the standard County contract to be used for this project is attached as Exhibit B. If an agreement cannot be reached, negotiations with the second ranking Contractor shall commence.

All bidder(s) shall describe any exception or deviation from the requirements of the RFP. Each clarification, exception or deviation must be clearly identified. If your firm has no clarification, exception or deviation, a statement to that effect shall be included in this section. The following contractual (Exhibit B of this RFP) terms are non-negotiable:

- Indemnification (Point 21)
- All insurance terms (Point 22)
- Termination (Point 5)
- Ownership/Use of Contract Materials and Products ((If applicable) Point 6))
- Disputes (Point 11)
- Governing Law (Point 23.11)

15.0 CANCELLATION OF PROCUREMENT PROCESS

County may cancel the procurement process at any time. All proposals become the property of the County. All information submitted in the proposal becomes “public record” as defined by the State of California upon completion of the procurement process. If any proprietary information is contained in or attached to the proposal, it must be clearly identified by the Contractor; otherwise the Contractor agrees that any and all documents provided may be released to the public after contract award.

The procurement process may be canceled after opening, but prior to award if the County determines that cancellation is in the best interest of the County for reasons (but not limited to) such as:

- a. Inadequate, ambiguous, or otherwise deficient specifications that were cited in the RFP.
- b. The services are no longer required.
- c. Proposals received are at an unreasonable cost.
- d. Proposal did not independently arrive in open competition, were collusive, or were not submitted in good faith.
- e. The County determines, after analysis of the proposals that its needs can be satisfied through a less expensive method.

The County reserves the right to amend or modify the project Scope of Services prior to the award of contract, as necessity may dictate, and to reject any and all proposals hereunder. This Request for Proposal does not

commit the County to award a contract or to pay any costs incurred in the preparation of a proposal in response to this request. The County reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified source or to cancel in part or in its entirety this Request of Proposal if it is in the best interest of the County.

16.0 CONFIDENTIALITY AND PROPRIETARY DATA

All materials received relative to this RFP will be kept confidential, until such time an award is made or the RFP is canceled, at which time all materials received will be made available to the public. Proposals received will be subject to Government Code §6250, the Public Information Act. Proposal Submitters should mark information they consider proprietary or confidential in the event it is exempt from the requirements of the Act.

17.0 COUNTY OBSERVED HOLIDAYS

HOLIDAY	DAY OBSERVED
* New Year's Day	January 1
Martin Luther King Jr's Birthday	Third Monday in January
Lincoln's Birthday	February 12
Washington's Birthday	Third Monday in February
Memorial Day	Last Monday in May
Independence Day	July 4
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Veterans' Day	November 11
*Thanksgiving Day	Fourth Thursday in November
* Following Thanksgiving	Friday following the fourth Thursday in November
*Christmas Day	December 25

*** Note:**

- ❖ Thanksgiving Day, which shall be the fourth Thursday in November unless otherwise appointed.
- ❖ Friday following Thanksgiving Day.
- ❖ December 24 and 31 when they fall on Monday.
- ❖ December 26 and January 2, when they fall on Friday.
- ❖ Friday proceeding January 1, February 12, July 4, November 11 or December 25, when such date falls on Saturday; the Monday following such date when such date falls on a Sunday.

EXHIBIT A
COST PROPOSAL SHEET

This RFP is for a fixed price contract. Vendor must provide the cost proposal for each phase as follows:

Phase 1: Perform a detailed well documented inventory \$ _____

Phase 2: \$ _____
Migration from Novell Netware to Microsoft Active Directory Domain Services

Phase 3: Migration from Novell GroupWise to Microsoft Exchange \$ _____

Phase 4: \$ _____
Implementation assistance with planning, requirements, and setup of workstations
migration/upgrade/replacement

Phase 5: Provide training to end users \$ _____

Phase 6: Provide training to Technical Staff \$ _____

CERTIFICATIONS

I, _____, a duly authorized agent of
Printed Name of Agent/Officer

_____, hereby certify that _____,
Name of Organization/Consortium Name of Organization/Consortium

by submission of this proposal in response to the Professional/Personal Services RFP agree upon contract
award to carry out the requirements specified and obligations set forth therein.

Signature _____ Date _____

Title of Agent/Officer _____

EXHIBIT A
COST PROPOSAL SHEET

Option 1 Managed Service (7x24x365 Technicians On-Site Support Model)

First Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Second Year

- | | |
|-----------------------------------|----------|
| Services Desk Function Activities | \$ _____ |
| Service Operations Activities | \$ _____ |
| Service Improvement Activities | \$ _____ |

Third Year

- | | |
|-----------------------------------|----------|
| Services Desk Function Activities | \$ _____ |
| Service Operations Activities | \$ _____ |
| Service Improvement Activities | \$ _____ |

Fourth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Fifth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Option 2 Managed Services (7x24x365 Hybrid Support Model – Technician on-site, on-call, and remote monitoring)

First Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Second Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Third Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Fourth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Fifth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Option 3 Managed Services (6am-6pm 7x365 Technician On-Site and 6pm-6am 7x365 On-Call Support Model)

First Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Second Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Third Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Fourth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

Fifth Year

- | | |
|--------------------------------------|----------|
| a. Services Desk Function Activities | \$ _____ |
| b. Service Operations Activities | \$ _____ |
| c. Service Improvement Activities | \$ _____ |

CERTIFICATIONS

I, _____, a duly authorized agent of
Printed Name of Agent/Officer

_____, hereby certify that _____,
Name of Organization/Consortium Name of Organization/Consortium

by submission of this proposal in response to the Professional/Personal Services RFP agree upon contract award to carry out the requirements specified and obligations set forth therein.

Signature _____ Date _____

Title of Agent/Officer _____

**EXHIBIT B
SAMPLE AGREEMENT**

PROFESSIONAL SERVICE AGREEMENT

for

(INSERT NAME OF PROGRAM)

between

COUNTY OF RIVERSIDE

and

(INSERT COMPANY NAME)



TABLE OF CONTENTS

<u>SECTION HEADING</u>	<u>PAGE NUMBER</u>
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This Agreement, made and entered into this ____ day of ____, 2009, by and between (INSERT COMPANY NAME), (herein referred to as "CONTRACTOR"), and the COUNTY OF RIVERSIDE, a political subdivision of the State of California, (herein referred to as "COUNTY"). The parties agree as follows:

1. Description of Services

1.1 CONTRACTOR shall provide all services as outlined and specified in Exhibit A, Scope of Services, consisting of (INSERT # OF PAGES) pages at the prices stated in Exhibit B, Payment Provisions, consisting of (INSERT # OF PAGES) pages.

1.2 CONTRACTOR represents that it has the skills, experience and knowledge necessary to fully and adequately perform under this Agreement, and the COUNTY relies upon this representation. CONTRACTOR shall perform to the satisfaction of the COUNTY and in conformance to and consistent with the highest standards of firms/professionals in the same discipline in the State of California.

1.3 CONTRACTOR affirms this it is fully apprised of all of the work to be performed under this Agreement; and the CONTRACTOR agrees it can properly perform this work at the prices stated in Exhibit B. CONTRACTOR is not to perform services or provide products outside of the Agreement.

1.4 Acceptance by the COUNTY of the CONTRACTOR's performance under this Agreement does not operate as a release of CONTRACTOR's responsibility for full compliance with the terms of this Agreement.

2. Period of Performance

2.1 This Agreement shall be effective upon signature of this Agreement by both parties and continue in effect through (INSERT DATE), with the option to renew for (INSERT # OF RENEWALS YEARS), renewable in one year increments by written amendment, unless terminated earlier. CONTRACTOR shall commence performance upon signature of this Agreement by both parties and shall diligently and continuously perform thereafter.

3. Compensation

3.1 The COUNTY shall pay the CONTRACTOR for services performed, products provided and expenses incurred in accordance with the terms of Exhibit B, Payment Provisions. Maximum payments by COUNTY to CONTRACTOR shall not exceed (INSERT DOLLAR AMOUNT) annually including all expenses. The COUNTY is not responsible for any fees or costs incurred above or beyond the contracted amount and shall have no obligation to purchase any specified amount of services or products. Unless otherwise specifically stated in Exhibit B, COUNTY shall not be responsible for payment of any of CONTRACTOR's expenses related to this Agreement.

3.2 No price increases will be permitted during the first year of this Agreement. All price decreases (for example, if CONTRACTOR offers lower prices to another governmental entity) will automatically be extended to the COUNTY. The COUNTY requires written proof satisfactory to COUNTY of cost increases prior to any approved price adjustment. After the first year of the award, a minimum of 30-days advance notice in writing is required to be considered and approved by COUNTY. No retroactive price adjustments will be considered. Any price increases must be stated in a written amendment to this Agreement. The net dollar amount of profit will remain firm during the period of the Agreement. Annual increases shall not exceed the Consumer Price Index- All Consumers, All Items - Greater Los Angeles, Riverside and Orange County areas (Insert type of item or service) and be subject to satisfactory performance review by the COUNTY and approved (if needed) for budget funding by the Board of Supervisors.

3.3 CONTRACTOR shall be paid only in accordance with an invoice submitted to COUNTY by CONTRACTOR within fifteen (15) days from the last day of each calendar month, and COUNTY shall pay the invoice within thirty (30) working days from the date of receipt of the invoice. Payment shall be made to CONTRACTOR only after services have been rendered or delivery of materials or products, and acceptance has been made by COUNTY. Prepare invoices in duplicate. For this Agreement, send the original and duplicate copies of invoices to:

(INSERT DEPARTMENT NAME AND ADDRESS)

- a) Each invoice shall contain a minimum of the following information: invoice number and date; remittance address; bill-to and ship-to addresses of ordering department/division; Agreement number (insert contract ID#); quantities; item descriptions, unit prices,

extensions, sales/use tax if applicable, and an invoice total.

- b) Invoices shall be rendered monthly in arrears.
- c) In accordance with California Government Code Section 926.10, COUNTY is not allowed to pay excess interest and late charges.

3.4 The COUNTY obligation for payment of this Agreement beyond the current fiscal year end is contingent upon and limited by the availability of COUNTY funding from which payment can be made. No legal liability on the part of the COUNTY shall arise for payment beyond June 30 of each calendar year unless funds are made available for such payment. In the event that such funds are not forthcoming for any reason, COUNTY shall immediately notify CONTRACTOR in writing; and this Agreement shall be deemed terminated and have no further force and effect.

4. Alteration or Changes to the Agreement

4.1 The Board of Supervisors and the COUNTY Purchasing Agent and/or his designee are the only authorized COUNTY representatives who may at any time, by written order, make alterations to this Agreement. If any such alteration causes an increase or decrease in the cost of, or the time required for the performance under this Agreement, an equitable adjustment shall be made in the Agreement price or delivery schedule, or both, and the Agreement shall be modified by written amendment accordingly.

4.2 Any claim by the CONTRACTOR for additional payment related to this Agreement shall be made in writing by the CONTRACTOR within 30 days of when the CONTRACTOR has or should have notice of any actual or claimed change in the work which results in additional and unanticipated cost to the CONTRACTOR. If the COUNTY Purchasing Agent decides that the facts provide sufficient justification, he may authorize additional payment to the CONTRACTOR pursuant to the claim. Nothing in this section shall excuse the CONTRACTOR from proceeding with performance of the Agreement even if there has been a change.

5. Termination

5.1 COUNTY may terminate this Agreement without cause upon 30 days written notice served upon the CONTRACTOR stating the extent and effective date of termination.

5.2 COUNTY may, upon five (5) days written notice, terminate this Agreement for CONTRACTOR's default, if CONTRACTOR refuses or fails to comply with the terms of this Agreement or fails to make progress so as to endanger performance and does not immediately cure such failure. In the event of such termination, the COUNTY may proceed with the work in any manner deemed proper by COUNTY.

5.3 After receipt of the notice of termination, CONTRACTOR shall:

- (a) Stop all work under this Agreement on the date specified in the notice of termination; and
- (b) Transfer to COUNTY and deliver in the manner as directed by COUNTY any materials, reports or other products which, if the Agreement had been completed or continued, would have been required to be furnished to COUNTY.

5.4 After termination, COUNTY shall make payment only for CONTRACTOR's performance up to the date of termination in accordance with this Agreement and at the rates set forth in Exhibit B.

5.5 CONTRACTOR's rights under this Agreement shall terminate (except for fees accrued prior to the date of termination) upon dishonesty or a willful or material breach of this Agreement by CONTRACTOR; or in the event of CONTRACTOR's unwillingness or inability for any reason whatsoever to perform the terms of this Agreement. In such event, CONTRACTOR shall not be entitled to any further compensation under this Agreement.

5.6 The rights and remedies of COUNTY provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or this Agreement.

6. Ownership/Use of Contract Materials and Products

The CONTRACTOR agrees that all materials, reports or products in any form, including electronic, created by CONTRACTOR for which CONTRACTOR has been compensated by COUNTY pursuant to this Agreement shall be the sole property of the COUNTY; and may be used by the COUNTY for any purpose COUNTY deems to be appropriate, including, but not limit to, duplication and/or distribution within the

COUNTY or to third parties. CONTRACTOR agrees not to release or circulate in whole or part such materials, reports or products without prior written authorization of the COUNTY.

7. Conduct of Contractor

7.1 The CONTRACTOR covenants that it presently has no interest, including, but not limited to, other projects or contracts, and shall not acquire any such interest, direct or indirect, which would conflict in any manner or degree with CONTRACTOR's performance under this Agreement. The CONTRACTOR further covenants that no person or subcontractor having any such interest shall be employed or retained by CONTRACTOR under this Agreement. The CONTRACTOR agrees to inform the COUNTY of all the CONTRACTOR's interests, if any, which are or may be perceived as incompatible with the COUNTY's interests.

7.2 The CONTRACTOR shall not, under circumstances which could be interpreted as an attempt to influence the recipient in the conduct of his/her duties, accept any gratuity or special favor from individuals or firms with whom the CONTRACTOR is doing business or proposing to do business, in accomplishing the work under this Agreement.

7.3 The CONTRACTOR or its employees shall not offer gifts, gratuity, favors, and entertainment directly or indirectly to COUNTY employees.

8. Inspection of Service; Quality Control/Assurance

8.1 All performance (which includes services, workmanship, materials, supplies and equipment furnished or utilized in the performance of this Agreement) shall be subject to inspection and test by the COUNTY or other regulatory agencies at all times. The CONTRACTOR shall provide adequate cooperation to any inspector or other COUNTY representative to permit him/her to determine the CONTRACTOR's conformity with the terms of this Agreement. If any services performed or products provided by CONTRACTOR are not in conformance with the terms of this Agreement, the COUNTY shall have the right to require the CONTRACTOR to perform the services or provide the products in conformance with the terms of the Agreement at no additional cost to the COUNTY. When the services to be performed or the products to be provided are of such nature that the difference cannot be corrected, the COUNTY shall have the right to: (1) require the CONTRACTOR immediately to take all necessary steps to ensure future performance in conformity with the terms of the Agreement; and/or (2) reduce the Agreement price to reflect the reduced value of the services performed or products provided. The COUNTY may also terminate this Agreement for default and charge to CONTRACTOR any costs incurred by the COUNTY because of the CONTRACTOR's failure to perform.

8.2 CONTRACTOR shall establish adequate procedures for self-monitoring and quality control and assurance to ensure proper performance under this Agreement; and shall permit a COUNTY representative or other regulatory official to monitor, assess or evaluate CONTRACTOR's performance under this Agreement at any time upon reasonable notice to CONTRACTOR.

9. Independent Contractor

The CONTRACTOR is, for purposes relating to this Agreement, an independent contractor and shall not be deemed an employee of the COUNTY. It is expressly understood and agreed that the CONTRACTOR (including its employees, agents and subcontractors) shall in no event be entitled to any benefits to which COUNTY employees are entitled, including but not limited to overtime, any retirement benefits, worker's compensation benefits, and injury leave or other leave benefits. There shall be no employer-employee relationship between the parties; and CONTRACTOR shall hold COUNTY harmless from any and all claims that may be made against COUNTY based upon any contention by a third party that an employer-employee relationship exists by reason of this Agreement. It is further understood and agreed by the parties that CONTRACTOR in the performance of this Agreement is subject to the control or direction of COUNTY merely as to the results to be accomplished and not as to the means and methods for accomplishing the results.

10. Subcontract for Work or Services

No contract shall be made by the CONTRACTOR with any other party for furnishing any of the work or services under this Agreement without the prior written approval of the COUNTY; but this provision shall not require the approval of contracts of employment between the CONTRACTOR and personnel assigned under this Agreement, or for parties named in the proposal and agreed to under this Agreement.

11. Disputes

11.1 The parties shall attempt to resolve any disputes amicably at the working level. If that is not successful, the dispute shall be referred to the senior management of the parties. Any dispute relating to this Agreement which is not resolved by the parties shall be decided by the COUNTY's Purchasing Department's Compliance Contract Officer who shall furnish the decision in writing. The decision of the COUNTY's Compliance Contract Officer shall be final and conclusive unless determined by a court of competent jurisdiction to have been fraudulent, capricious, arbitrary, or so grossly erroneous as necessarily to imply bad faith. The CONTRACTOR shall proceed diligently with the performance of this Agreement pending the resolution of a dispute.

11.2 Prior to the filing of any legal action related to this Agreement, the parties shall be obligated to attend a mediation session in Riverside County before a neutral third party mediator. A second mediation session shall be required if the first session is not successful. The parties shall share the cost of the mediations.

12. Licensing and Permits

CONTRACTOR shall comply with all State or other licensing requirements, including but not limited to the provisions of Chapter 9 of Division 3 of the Business and Professions Code. All licensing requirements shall be met at the time proposals are submitted to the COUNTY. CONTRACTOR warrants that it has all necessary permits, approvals, certificates, waivers and exemptions necessary for performance of this Agreement as required by the laws and regulations of the United States, the State of California, the County of Riverside and all other governmental agencies with jurisdiction, and shall maintain these throughout the term of this Agreement.

13. Use By Other Political Entities

The CONTRACTOR agrees to extend the same pricing, terms and conditions as stated in this Agreement to each and every political entity, special district, and related non-profit entity in Riverside County. It is understood that other entities shall make purchases in their own name, make direct payment, and be liable directly to the CONTRACTOR; and COUNTY shall in no way be responsible to CONTRACTOR for other entities' purchases.

14. Non-Discrimination

CONTRACTOR shall not be discriminate in the provision of services, allocation of benefits, accommodation in facilities, or employment of personnel on the basis of ethnic group identification, race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status or sex in the performance of this Agreement; and, to the extent they shall be found to be applicable hereto, shall comply with the provisions of the California Fair Employment and Housing Act (Gov. Code 12900 et. seq), the Federal Civil Rights Act of 1964 (P.L. 88-352), the Americans with Disabilities Act of 1990 (42 U.S.C. §1210 et seq.) and all other applicable laws or regulations.

15. Records and Documents

CONTRACTOR shall make available, upon written request by any duly authorized Federal, State or COUNTY agency, a copy of this Agreement and such books, documents and records as are necessary to certify the nature and extent of the CONTRACTOR's costs related to this Agreement. All such books, documents and records shall be maintained by CONTRACTOR for at least five years following termination of this Agreement and be available for audit by the COUNTY. CONTRACTOR shall provide to the COUNTY reports and information related to this Agreement as requested by COUNTY.

16. Confidentiality

16.1 The CONTRACTOR shall not use for personal gain or make other improper use of privileged or confidential information which is acquired in connection with this Agreement. The term "privileged or confidential information" includes but is not limited to: unpublished or sensitive technological or scientific information; medical, personnel, or security records; anticipated material requirements or pricing/purchasing

actions; COUNTY information or data which is not subject to public disclosure; COUNTY operational procedures; and knowledge of selection of contractors, subcontractors or suppliers in advance of official announcement.

16.2 The CONTRACTOR shall protect from unauthorized disclosure names and other identifying information concerning persons receiving services pursuant to this Agreement, except for general statistical information not identifying any person. The CONTRACTOR shall not use such information for any purpose other than carrying out the CONTRACTOR's obligations under this Agreement. The CONTRACTOR shall promptly transmit to the COUNTY all third party requests for disclosure of such information. The CONTRACTOR shall not disclose, except as otherwise specifically permitted by this Agreement or authorized in advance in writing by the COUNTY, any such information to anyone other than the COUNTY. For purposes of this paragraph, identity shall include, but not be limited to, name, identifying number, symbol, or other identifying particular assigned to the individual, such as finger or voice print or a photograph.

17. Administration/Contract Liaison

The COUNTY Purchasing Agent, or designee, shall administer this Agreement on behalf of the COUNTY. The Purchasing Department is to serve as the liaison with CONTRACTOR in connection with this Agreement.

18. Notices

All correspondence and notices required or contemplated by this Agreement shall be delivered to the respective parties at the addresses set forth below and are deemed submitted two days after their deposit in the United States mail, postage prepaid:

COUNTY OF RIVERSIDE

(INSERT DEPARTMENT NAME)
(INSERT ADDRESS)

CONTRACTOR

(INSERT CONTRACTOR NAME)
(INSERT ADDRESS)

19. Force Majeure

If either party is unable to comply with any provision of this Agreement due to causes beyond its reasonable control, and which could not have been reasonably anticipated, such as acts of God, acts of war, civil disorders, or other similar acts, such party shall not be held liable for such failure to comply.

20. EDD Reporting Requirements

In order to comply with child support enforcement requirements of the State of California, the COUNTY may be required to submit a Report of Independent Contractor(s) form **DE 542** to the Employment Development Department. The CONTRACTOR agrees to furnish the required data and certifications to the COUNTY within 10 days of notification of award of Agreement when required by the EDD. This data will be transmitted to governmental agencies charged with the establishment and enforcement of child support orders. Failure of the CONTRACTOR to timely submit the data and/or certificates required may result in the contract being awarded to another contractor. In the event a contract has been issued, failure of the CONTRACTOR to comply with all federal and state reporting requirements for child support enforcement or to comply with all lawfully served Wage and Earnings Assignments Orders and Notices of Assignment shall constitute a material breach of Agreement. If CONTRACTOR has any questions concerning this reporting requirement, please call (916) 657-0529. CONTRACTOR should also contact its local Employment Tax Customer Service Office listed in the telephone directory in the State Government section under "Employment Development Department" or access their Internet site at www.edd.ca.gov.

21. Hold Harmless/Indemnification

21.1 CONTRACTOR shall indemnify and hold harmless the County of Riverside, its Agencies, Districts, Special Districts and Departments, their respective directors, officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives from any liability, claim, damage or action whatsoever, based or asserted upon any act or omission of CONTRACTOR, its officers, employees, subcontractors, agents or representatives arising out of or in any way relating to this Agreement, including but not limited to property damage, bodily injury, or death. CONTRACTOR shall defend, at its sole cost and expense, including but not limited to attorney fees, cost of investigation, defense and settlements or awards, the County of Riverside, its Agencies, Districts, Special Districts and Departments, their respective directors,

officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives in any such action or claim. With respect to any action or claim subject to indemnification herein by CONTRACTOR, CONTRACTOR shall, at its sole cost, have the right to use counsel of its own choice and shall have the right to adjust, settle, or compromise any such action or claim without the prior consent of COUNTY; provided, however, that any such adjustment, settlement or compromise in no manner whatsoever limits or circumscribes CONTRACTOR's indemnification of COUNTY. CONTRACTOR's obligations hereunder shall be satisfied when CONTRACTOR has provided to COUNTY the appropriate form of dismissal (or similar document) relieving the COUNTY from any liability for the action or claim involved. The specified insurance limits required in this Agreement shall in no way limit or circumscribe CONTRACTOR's obligations to indemnify and hold harmless the COUNTY.

21.2 In the event there is conflict between this clause and California Civil Code Section 2782, this clause shall be interpreted to comply with Civil Code 2782. Such interpretation shall not relieve the CONTRACTOR from indemnifying the COUNTY to the fullest extent allowed by law.

21.3 CONTRACTOR's indemnification obligations shall also apply to any action or claim regarding actual or alleged intellectual property infringement related to any material or product provided to COUNTY pursuant to this Agreement. In the event of any such action or claim, CONTRACTOR shall provide immediate notice to COUNTY of the action or claim. CONTRACTOR may defend or settle the action or claim as CONTRACTOR deems appropriate; however, CONTRACTOR shall be required to obtain for COUNTY the right to continue to use the material or product (or a similar non-infringing material or product with the same function) on terms identical to those stated in this Agreement.

22. Insurance

Without limiting or diminishing the CONTRACTOR's obligation to indemnify or hold the COUNTY harmless, CONTRACTOR shall procure and maintain or cause to be maintained, at its sole cost and expense, the following insurance coverages during the term of this Agreement:

22.1 Workers' Compensation

If the CONTRACTOR has employees as defined by the State of California, the CONTRACTOR shall maintain statutory Workers' Compensation Insurance (Coverage A) as prescribed by the laws of the State of California. Policy shall include Employers' Liability (Coverage B) including Occupational Disease with limits not less than **\$1,000,000** per person per accident. The policy shall be endorsed to waive subrogation in favor of the County of Riverside, and, if applicable, to provide a Borrowed Servant/Alternate Employer Endorsement.

22.2 Commercial General Liability

Commercial General Liability insurance coverage, including but not limited to, premises liability, contractual liability, products and completed operations liability, personal and advertising injury covering claims which may arise from or out of CONTRACTOR'S performance of its obligations hereunder. Policy shall name all Agencies, Districts, Special Districts, and Departments of the COUNTY of Riverside, their respective directors, officers, Board of Supervisors, employees, elected or appointed officials, agents or representatives as Additional Insureds. Policy's limit of liability shall not be less than **\$1,000,000** per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this agreement or be no less than two (2) times the occurrence limit.

22.3 Vehicle Liability

If vehicles or mobile equipment are used in the performance of the obligations under this Agreement, then CONTRACTOR shall maintain liability insurance for all owned, non-owned or hired vehicles so used in an amount not less than **\$1,000,000** per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this agreement or be no less than two (2) times the occurrence limit. Policy shall name all Agencies, Districts, Special Districts, and Departments of the COUNTY of Riverside, their respective directors, officers, Board of Supervisors, employees, elected or appointed officials, agents or representatives as Additional Insureds.

22.4 Professional Liability Insurance

CONTRACTOR shall maintain Professional Liability Insurance providing coverage for the CONTRACTOR's performance of work included within this Agreement, with a limit of liability of not less than

\$1,000,000 per occurrence and **\$2,000,000** annual aggregate. If CONTRACTOR's Professional Liability Insurance is written on a claims made basis rather than an occurrence basis, such insurance shall continue through the term of this Agreement and CONTRACTOR shall purchase at his sole expense either 1) an Extended Reporting Endorsement (also known as Tail Coverage); or 2) Prior Dates Coverage from new insurer with a retroactive date back to the date of, or prior to, the inception of this Agreement; or 3) demonstrate through Certificates of Insurance that CONTRACTOR has Maintained continuous coverage with the same or original insurer. Coverage provided under items; 1), 2) or 3) will continue for a period of five (5) years beyond the termination of this Agreement.

22.5 General Insurance Provisions - All lines

a) Any insurance carrier providing insurance coverage hereunder shall be admitted to the State of California and have an A M BEST rating of not less than A: VIII (A:8) unless such requirements are waived, in writing, by the COUNTY Risk Manager. If the COUNTY's Risk Manager waives a requirement for a particular insurer such waiver is only valid for that specific insurer and only for one policy term.

b) The CONTRACTOR must declare its insurance self-insured retentions. If such self-insured retentions exceed \$500,000 per occurrence such retentions shall have the prior written consent of the County Risk Manager before the commencement of operations under this Agreement. Upon notification of self insured retention unacceptable to the COUNTY, and at the election of the County's Risk Manager, CONTRACTOR'S carriers shall either; 1) reduce or eliminate such self-insured retention as respects this Agreement with the COUNTY, or 2) procure a bond which guarantees payment of losses and related investigations, claims administration, and defense costs and expenses.

c) CONTRACTOR shall cause CONTRACTOR'S insurance carrier(s) to furnish the COUNTY of Riverside with either 1) a properly executed original Certificate(s) of Insurance and certified original copies of Endorsements effecting coverage as required herein, or 2) if requested to do so orally or in writing by the COUNTY Risk Manager, provide original Certified copies of policies including all Endorsements and all attachments thereto, showing such insurance is in full force and effect. Further, said Certificate(s) and policies of insurance shall contain the covenant of the insurance carrier(s) that thirty (30) days written notice shall be given to the COUNTY of Riverside prior to any material modification, cancellation, expiration or reduction in coverage of such insurance. In the event of a material modification, cancellation, expiration, or reduction in coverage, this Agreement shall terminate forthwith, unless the COUNTY of Riverside receives, prior to such effective date, another properly executed original Certificate of Insurance and original copies of endorsements or certified original policies, including all endorsements and attachments thereto evidencing coverage's set forth herein and the insurance required herein is in full force and effect. ***CONTRACTOR shall not commence operations until the COUNTY has been furnished original Certificate (s) of Insurance and certified original copies of endorsements or policies of insurance including all endorsements and any and all other attachments as required in this Section. An individual authorized by the insurance carrier to do so on its behalf shall sign the original endorsements for each policy and the Certificate of Insurance.***

d) It is understood and agreed to by the parties hereto and the insurance company(s), that the Certificate(s) of Insurance and policies shall so covenant and shall be construed as primary insurance, and the COUNTY'S insurance and/or deductibles and/or self-insured retention's or self-insured programs shall not be construed as contributory.

e) The COUNTY'S Reserved Rights--Insurance. If, during the term of this Agreement or any extension thereof, there is a material change in the scope of services; or, there is a material change in the equipment to be used in the performance of the scope of work (such as the use of aircraft or watercraft) the COUNTY reserves the right to adjust the types of insurance required under this Agreement and the monetary limits of liability for the insurance coverage's currently required herein, if, in the COUNTY Risk Manager's reasonable judgment, the amount or type of insurance carried by the CONTRACTOR has become inadequate.

f) CONTRACTOR shall pass down the insurance obligations contained herein to all tiers of subcontractors working under this Agreement.

g) The insurance requirements contained in this Agreement may be met with a program(s) of self-insurance acceptable to the COUNTY.

23. General

23.1 CONTRACTOR shall not delegate or assign any interest in this Agreement, whether by operation of law or otherwise, without the prior written consent of COUNTY. Any attempt to delegate or assign any interest herein shall be deemed void and of no force or effect.

23.2 Any waiver by COUNTY of any breach of any one or more of the terms of this Agreement shall not be construed to be a waiver of any subsequent or other breach of the same or of any other term of this Agreement. Failure on the part of COUNTY to require exact, full and complete compliance with any terms of this Agreement shall not be construed as in any manner changing the terms or preventing COUNTY from enforcement of the terms of this Agreement.

23.3 In the event the CONTRACTOR receives payment under this Agreement which is later disallowed by COUNTY for nonconformance with the terms of the Agreement, the CONTRACTOR shall promptly refund the disallowed amount to the COUNTY on request; or at its option the COUNTY may offset the amount disallowed from any payment due to the CONTRACTOR.

23.4 CONTRACTOR shall not provide partial delivery or shipment of services or products unless specifically stated in the Agreement.

23.5 CONTRACTOR shall not provide any services or products subject to any chattel mortgage or under a conditional sales contract or other agreement by which an interest is retained by a third party. The CONTRACTOR warrants that it has good title to all materials or products used by CONTRACTOR or provided to COUNTY pursuant to this Agreement, free from all liens, claims or encumbrances.

23.6 Nothing in this Agreement shall prohibit the COUNTY from acquiring the same type or equivalent equipment, products, materials or services from other sources, when deemed by the COUNTY to be in its best interest. The COUNTY reserves the right to purchase more or less than the quantities specified in this Agreement.

23.7 The COUNTY agrees to cooperate with the CONTRACTOR in the CONTRACTOR's performance under this Agreement, including, if stated in the Agreement, providing the CONTRACTOR with reasonable facilities and timely access to COUNTY data, information and personnel.

23.8 CONTRACTOR shall comply with all applicable Federal, State and local laws and regulations. CONTRACTOR will comply with all applicable COUNTY policies and procedures. In the event that there is a conflict between the various laws or regulations that may apply, the CONTRACTOR shall comply with the more restrictive law or regulation.

23.9 CONTRACTOR shall comply with all air pollution control, water pollution, safety and health ordinances, statutes or regulations which apply to performance under this Agreement.

23.10 CONTRACTOR shall comply with all requirements of the Occupational Safety and Health Administration (OSHA) standards and codes as set forth by the U.S. Department of Labor and the State of California (Cal/OSHA).

23.11 This Agreement shall be governed by the laws of the State of California. Any legal action related to the performance or interpretation of this Agreement shall be filed only in the Superior Court of the State of California located in Riverside, California, and the parties waive any provision of law providing for a change of venue to another location. In the event any provision in this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

23.12 This Agreement, including any attachments or exhibits, constitutes the entire Agreement of the parties with respect to its subject matter and supersedes all prior and contemporaneous representations, proposals, discussions and communications, whether oral or in writing. This Agreement may be changed or modified only by a written amendment signed by authorized representatives of both parties.

COUNTY:
(INSERT DEPARTMENT NAME)
(INSERT ADDRESS)

CONTRACTOR:
(INSERT CONTRACTOR NAME)
(INSERT ADDRESS)

Signature: _____

Signature: _____

Print Name: (YOUR NAME HERE)

Print Name: (CONTRACTOR NAME HERE)

Title: (INSERT TITLE)

Title: (INSERT TITLE)

Dated: _____

Dated: _____

(Insert)
EXHIBIT A
SCOPE OF SERVICE
(INSERT SCOPE OF SERVICE)

EXHIBIT B
PAYMENT PROVISIONS
(INSERT PAYMENT SCHEDULE)

Exhibit C

HIPAA Business Associate Agreement Addendum to Contract

Between the County of Riverside and

FIRM

This HIPAA Business Associate Agreement Addendum (“Addendum”) supplements, and is made part of the Agreement for Legal Services (the “Underlying Agreement”) between the COUNTY OF RIVERSIDE (“County”) and **FIRM** (“Contractor”) as of the date of approval by both parties (the “Effective Date”).

RECITALS

WHEREAS, County and Contractor entered into the Underlying Agreement pursuant to which Contractor provides services to County, and in conjunction with the provision of such services certain Protected Health Information (“PHI”) and/or certain electronic Protected Health Information (ePHI) may be made available to Contractor for the purposes of carrying out its obligations under the Underlying Agreement; and,

WHEREAS, the provisions of the Health Insurance Portability and Accountability Act, Pub. L. No. 104-161 of 1996 (“HIPAA”), more specifically the regulations found at Title 45, CFR, Parts 160 and 164 (the “Privacy Rule”) and/or Part 162 (the “Security Rule”), as may be amended from time to time, which are applicable to the protection of any disclosure of PHI and /or ePHI pursuant to the Underlying Agreement; and,

WHEREAS, County is a Covered Entity, as defined in the Privacy Rule; and,

WHEREAS, Contractor, when a recipient of PHI and/or ePHI from County, is a Business Associate as defined in the Privacy Rule; and,

WHEREAS, the parties agree that any disclosure or use of PHI and/or ePHI be in compliance with the Privacy Rule, Security Rule, or other applicable law;

NOW, THEREFORE, in consideration of the mutual promises and covenants contained herein, the Parties agree as follows:

1. Definitions. Unless otherwise provided in this Addendum, capitalized terms shall have the same meanings as set forth in the Privacy Rule and/or Security Rule, as may be amended from time to time.
2. Scope of Use and Disclosure by Contractor of County Disclosed PHI and/or ePHI
 - A. Contractor shall be permitted to use PHI and/or ePHI disclosed to it by the County:
 - (1) On behalf of the County, or to provide services to the County for the purposes contained herein, if such use or disclosure would not violate the Privacy Rule and/or Security Rule;
 - (2) As necessary to perform any and all of its obligations under the Underlying Agreement.
 - B. Unless otherwise limited herein, in addition to any other uses and/or disclosures permitted or authorized by this Addendum or required by law, Contractor may:
 - (1) Use the PHI and/or ePHI in its possession for its proper management and administration and to fulfill any legal obligations.
 - (2) Disclose the PHI and/or ePHI in its possession to a third party for the purpose of Contractor’s proper management and administration or to fulfill any legal responsibilities of Contractor. Contractor may disclose PHI and/or ePHI as necessary for Contractor’s operations only if:
 - (a) The disclosure is required by law; or
 - (b) Contractor obtains written assurances from any person or organization to which

Contractor will disclose such PHI and/or ePHI that the person or organization will:

- (i) Hold such PHI and/or ePHI in confidence and use or further disclose it only for the purpose of which Contractor disclosed it to the third party, or as required by law; and,
 - (ii) The third party will notify Contractor of any instances of which it becomes aware in which the confidentiality of the information has been breached.
- (3) Aggregate the PHI and/or ePHI aggregate the PHI and/or ePHI with that of other data for the purpose of providing County with data analyses related to the Underlying Agreement, or any other purpose, financial or otherwise, as requested by County.
- (4) Not disclose PHI and/or ePHI disclosed to Contractor by County not authorized by the Underlying Agreement or this Addendum without patient authorization or de-identification of the PHI and/or ePHI as authorized in writing by County.
- (5) De-identify any and all PHI and/or ePHI of County received by Contractor under this Addendum provided that the de-identification conforms to the requirements of the Privacy Rule and/or Security Rule and does not preclude timely payment and/or claims processing and receipt.
- C. Contractor agrees that it will neither use nor disclose PHI and/or ePHI it receives from County, or from another business associate of County, except as permitted or required by this Addendum, or as required by law, or as otherwise permitted by law.
- D. Notwithstanding the foregoing, in any instance where applicable state and/or federal laws and/or regulations are stricter in their requirements than the provisions of HIPAA and prohibit the disclosure of mental health, and/or substance abuse records, the applicable state and/or federal laws and/or regulations shall control the disclosure of records.

3. Obligations of County.

- A. County agrees that it will make its best efforts to promptly notify Contractor in writing of any restrictions on the use and disclosure of PHI and/or ePHI agreed to by County that may affect Contractor's ability to perform its obligations under the Underlying Agreement, or this Addendum.
- B. County agrees that it will make its best efforts to promptly notify Contractor in writing of any changes in, or revocation of, permission by any Individual to use or disclose PHI and/or ePHI, if such changes or revocation may affect Contractor's ability to perform its obligations under the Underlying Agreement, or this Addendum.
- C. County agrees to make its best efforts to promptly notify Contractor in writing of any known limitation(s) in its notice of privacy practices to the extent that such limitation may affect Contractor's use of disclosure of PHI and/or ePHI.
- D. County shall not request Contractor to use or disclose PHI and/or ePHI in any manner that would not be permissible under the Privacy Rule and/or Security Rule.
- E. County will obtain any authorizations necessary for the use or disclosure of PHI and/or ePHI, so that Contractor can perform its obligations under this Addendum and/or the Underlying Agreement.

4. Obligations of Contractor. In connection with its use of PHI and/or ePHI disclosed by County to Contractor, Contractor agrees to:

- A. Use or disclose PHI and/or ePHI only as permitted or required by this Addendum or as required by law.
- B. Use reasonable and appropriate safeguards to prevent use or disclosure of PHI and/or ePHI other than as provided for by this Addendum.
- C. To the extent practicable, mitigate any harmful effect that is known to Contractor of a use or disclosure of

PHI and/or ePHI by Contractor in violation of this Addendum.

- D. Report to County any use or disclosure of PHI and/or ePHI not provided for by this Addendum of which Contractor becomes aware.
- E. Require sub-contractors or agents to whom Contractor provides PHI and/or ePHI to agree to the same restrictions and conditions that apply to Contractor pursuant to this Addendum.
- F. Use appropriate administrative, technical and physical safeguards to prevent inappropriate use or disclosure of PHI and/or ePHI created or received for or from the County.
- G. Obtain and maintain knowledge of the applicable laws and regulations related to HIPAA, as may be amended from time to time.

5. Access to PHI, Amendment and Disclosure Accounting. Contractor agrees to:

- A. Provide access, at the request of County, within five (5) days, to PHI in a Designated Record Set, to the County, or to an Individual as directed by the County.
- B. To make any amendment(s) to PHI in a Designated Record Set that the County directs or agrees to at the request of County or an Individual within sixty (60) days of the request of County.
- C. To assist the County in meeting its disclosure accounting under HIPAA:
 - (1) Contractor agrees to document such disclosures of PHI and information related to such disclosures as would be required for the County to respond to a request by an Individual for an accounting of disclosures of PHI.
 - (2) Contractor agrees to provide to County or an Individual, within sixty (60) days, information collected in accordance with this section to permit the County to respond to a request by an Individual for an accounting of disclosures of PHI.
 - (3) Contractor shall have available for the County the information required by this section for the six (6) years preceding the County's request for information (except the Contractor need have no information for disclosures occurring before April 14, 2003).
- D. Make available to the County, or to the Secretary of Health and Human Services, Contractor's internal practices, books and records relating to the use of and disclosure of PHI for purposes of determining Contractor's compliance with the Privacy Rule, subject to any applicable legal restrictions.
- E. Within thirty (30) days of receiving a written request from County, make available any and all information necessary for County to make an accounting of disclosures of County PHI by Contractor.
- F. Within thirty (30) days of receiving a written request from County, incorporate any amendments or corrections to the PHI in accordance with the Privacy Rule in the event that the PHI in Contractor's possession constitutes a Designated Record Set.
- G. Not make any disclosure of PHI that County would be prohibited from making.

6. Access to ePHI, Amendment and Disclosure Accounting. In the event contractor needs to create or have access to County ePHI, Contractor agrees to:

- A. Implement and maintain reasonable and appropriate administrative, physical, and technical safeguards to protect the confidentiality of, the integrity of, the availability of, and authorized persons' accessibility to, County ePHI as applicable under the terms and conditions of the Underlying Agreement. The ePHI shall include that which the Contractor may create, receive, maintain, or transmit on behalf of the County.
- B. Ensure that any agent, including a subcontractor, to whom Contractor provides ePHI agrees to implement reasonable and appropriated safeguards.

- C. Report to County any security incident of which Contractor becomes aware that concerns County ePHI.

7. Term and Termination.

- A. Term – this Addendum shall commence upon the Effective Date and terminate upon the termination of the Underlying Agreement, except as terminated by County as provided herein.
- B. Termination for Breach – County may terminate this Addendum, effective immediately, without cause, if County, in its sole discretion, determines that Contractor has breached a material provision of this Addendum. Alternatively, County may choose to provide Contractor with notice of the existence of an alleged material breach and afford Contractor with an opportunity to cure the alleged material breach. In the event Contractor fails to cure the breach to the satisfaction of County in a timely manner, County reserves the right to immediately terminate this Addendum.
- C. Effect of Termination – upon termination of this Addendum, for any reason, Contractor shall return or destroy all PHI and/or ePHI received from the County, or created or received by Contractor on behalf of County, and, in the event of destruction, Contractor shall certify such destruction, in writing, to County. This provision shall apply to all PHI and/or ePHI which is in possession of subcontractors or agents of Contractor. Contractor shall retain no copies of the PHI and/or ePHI.
- D. Destruction not Feasible – in the event that Contractor determines that returning or destroying the PHI and/or ePHI is not feasible, Contractor shall provide written notification to County of the conditions which make such return or destruction not feasible. Upon determination by Contractor that return or destruction of PHI is not feasible, Contractor shall extend the protections of this Addendum to such PHI and/or ePHI and limit further uses and disclosures of such PHI and/or ePHI to those purposes which make the return or destruction not feasible, for so long as Contractor maintains such PHI and/or ePHI.

8. Hold Harmless/Indemnification

Contractor shall indemnify and hold harmless all Agencies, Districts, Special Districts and Departments of the County, their respective directors, officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives from any liability whatsoever, based or asserted upon any services of Contractor, its officers, employees, subcontractors, agents or representatives arising out of or in any way relating to this Addendum, including but not limited to property damage, bodily injury, or death or any other element of any kind or nature whatsoever including fines, penalties or any other costs and resulting from any reason whatsoever arising from the performance of Contractor, its officers, agents, employees, subcontractors, agents or representatives from this Addendum. Contractor shall defend, at its sole expense, all costs and fees including but not limited to attorney fees, cost of investigation, defense and settlements or awards all Agencies, Districts, Special Districts and Departments of the County, their respective directors, officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives in any claim or action based upon such alleged acts or omissions.

With respect to any action or claim subject to indemnification herein by Contractor, Contractor shall, at their sole cost, have the right to use counsel of their choice, subject to the approval of County, which shall not be unreasonably withheld, and shall have the right to adjust, settle, or compromise any such action or claim without the prior consent of County; provided, however, that any such adjustment, settlement or compromise in no manner whatsoever limits or circumscribes Contractor's indemnification to County as set forth herein. Contractor's obligation to defend, indemnify and hold harmless County shall be subject to County having given Contractor written notice within a reasonable period of time of the claim or of the commencement of the related action, as the case may be, and information and reasonable assistance, at Contractor's expense, for the defense or settlement thereof. Contractor's obligation hereunder shall be satisfied when Contractor has provided to County the appropriate form of dismissal relieving County from any liability for the action or claim involved.

The specified insurance limits required in the Underlying Agreement of this Addendum shall in no way limit or circumscribe Contractor's obligations to indemnify and hold harmless the County herein from third party claims arising from the issues of this Addendum.

In the event there is conflict between this clause and California Civil Code Section 2782, this clause shall be interpreted to comply with Civil Code 2782. Such interpretation shall not relieve the Contractor from indemnifying the County to the fullest extent allowed by law.

In the event there is a conflict between this indemnification clause and an indemnification clause contained

in the Underlying Agreement of this Addendum, this indemnification shall only apply to the subject issues included within this Addendum.

9. General Provisions.

- A. Amendment – the parties agree to take such action as is necessary to amend this Addendum from time to time as is necessary for County to comply with the Privacy Rule and HIPAA generally.
- B. Survival – the respective rights and obligations of this Addendum shall survive the termination or expiration of this Addendum.
- C. Regulatory References – a reference in this Addendum to a section in the Privacy Rule means the section as in effect or as amended.
- D. Conflicts – any ambiguity in this Addendum and the Underlying Agreement shall be resolved to permit County to comply with the Privacy Rule, Security Rule, and HIPAA generally.
- E. Interpretation of Addendum – this Addendum shall be construed to be a part of the Underlying Agreement as one document. The purpose is to supplement the Underlying Agreement to include the requirements of HIPAA.

IN WITNESS WHEREOF, the parties hereto have executed this Addendum as set forth below:

CONTRACTOR

COUNTY OF RIVERSIDE

By: _____

By: _____

Date: _____

Date: _____

EXHIBIT D
LOCAL PREFERENCE
RFP #MCARC-106
Local Business Qualification Affidavit

The County of Riverside Local Business Preference may be applied to this Request for Proposal/Quotation. If you qualify for this preference, please submit this form along with your response to this RFP.

Definition of Local Business

A local business shall mean business firms with fixed offices located within the geographical boundaries of Riverside County, authorized to perform business within the County, and in doing so, credit all sales tax from sales generated within Riverside County to the County, and who provide product or perform contracted work using employees, of whom the majority are physically located in said local offices.

Local businesses" shall have a Riverside County business street address. Post office box numbers, residential addresses or un-staffed sales offices shall not suffice to establish status as a "local business". To qualify as a "local business" the location must be open and staffed during normal business hours and the business must establish proof that it has been located and doing business in Riverside County for at least (6) six months preceding its certification to the County as a local business.

Additional supporting documentation that may be requested by the County to verify qualification includes:

1. **A copy of their current BOE 531-A and/or BOE 530-C form** (State, Local & District Sales and Use Tax Return Form). This is what businesses submit to the State Board of Equalization when paying the sales tax to the State of California indicating the amount of the payment to be credited to each jurisdiction (i.e. Counties, Cities).
2. **A current business license** if required for the political jurisdiction the business is located in.
3. **Proof of the current business address.** The local business needs to be operating from a functional office that is staffed with the company's employees, during normal business hours.

Business Name: _____

Physical Address: _____

Phone: _____ FAX: _____ E-Mail: _____

Length of time at this location: _____ Number of Company Employees at this address: _____

If less than 6 month, list previous
Riverside County location: _____

Business License # (where applicable): _____ Jurisdiction _____

Hours of Operation: _____

Primary function of this location (i.e., sales, distribution, production, corporate, etc): _____

Signature of Company Official

Date

Submittal of false data will result in disqualification of local preference and/or doing business with Riverside County.