



REQUEST FOR PROPOSAL
Agency Intranet
AI RFP #0130

ISSUED: 10/16/2023

Responses Due: 11/10/2023

LIFEPATH SYSTEMS
1515 HERITAGE DR.
MCKINNEY, TX 75069
972-562-0190

For RFP Questions:

Willy Villavicencio

Purchasing Manager

wvillavicencio@lifepathsystems.org



REQUEST FOR PROPOSAL (RFP) AGENCY INTRANET #0130

Agency Intranet

Background Information

Collin County Mental Health Mental Retardation Center d/b/a LifePath Systems (the “Center”) was founded in 1986. It is the Local Behavioral Health Authority (LBHA) and the Local Intellectual and Developmental Disabilities Authority (LIDDA) for Collin County, Texas as authorized by the Texas Health and Human Services Commission (HHSC). In addition to its role as Authority, the Center is a provider of behavioral health services and a provider of services for individuals with intellectual or developmental disabilities.

Throughout this RFP, reference to “Center” is assumed to define and include LifePath Systems. Reference to the “vendor” is assumed to include the vendor and any other vendors and/or personnel with which the vendor has elected to partner for purposes of this RFP.

The Center is seeking services to plan, design and implement an agency Intranet. Interested parties are invited to submit proposals to supply the services listed in the RFP. The Center expects to award a contract for the plan, design, and implementation of an Intranet. In addition, practices are to be established and The Center staff is to be trained to operate, maintain, and support the Intranet. We currently have an externally hosted agency website, www.lifepathsystems.org, which provides information to the general public, businesses, government agencies, and other regional partners. Currently, The Center does not have an Intranet or an Extranet site. The proposed system must have the ability to integrate with Microsoft applications.

Scope of Services

The Center is seeking a vendor to provide a single solution for an agency Intranet system as outlined in the sections below. The Center shall work with the awarded vendor’s implementation services team for configuration of items listed in “**EXHIBIT-A- LPS AGENCY INTRANET Requirements-Vendor- Response**”, which must be submitted with all proposals.

A. **System Functionality**

The Center will consider both, on premise storage of data” and/or “Cloud based”. Cloud based option should be accessible via web and mobile application and supported 24/7 from the Center’s network and remote locations. System functionality should include but not be limited to:

• **Internal Communications**

- o Engage employees - Easily create marketing-grade campaigns that will meet consumer-level expectations. Leverage multiple channels and media types to take internal messages further (such as speaker series or all staff invites). Set goals, track success, and automate campaigns that our employees will sit up and take notice of.
- o Ensure content remains fresh and relevant - Stay on top of content governance with a content lifecycle review strategy. Arm the team with the tools to easily manage content over time, ensuring information and resources remain fresh, relevant, and accurate (evergreen).



- o Easily reach a remote workforce - Engage our entire workforce with a mobile-centric strategy. Connect hard-to-reach employees across any device, and ensure important updates, like emergency notifications reach them with push notifications and offline reading functionality.
- o Communicate business change easily - Convey and deliver business change effectively with open and transparent comms. Make use of resource centers for employees to get on-demand access to information they need, and easily provide updates and guidance to all.
- o Prioritize company culture - Create safe spaces for internal communities and encourage a culture of inclusion and belonging within your organization. Make content easily accessible for every person in the company and democratize access to information and updates (CLAS Standards, multilingual options, Video AI transcription).
- o Target your comms accordingly - Personalize communications by allowing employees to tailor their own experience through targeting and customization (GEO location tagging or according to title). Take advantage of personalized settings to recommend relevant and timely content and keep engagement building. Give employees the power to change their own page to reflect their needs and style.
- o Properly measure and demonstrate value - Drive alignment and measure comms with analytics. Utilize real-time data for powerful insights into how the workforce is interacting with our comms and track all aspects of how employees are using and responding to the daily content to continually drive innovative strategies.
- **Human Resources**
 - o Streamline human resources - Tackle employee experience at large with a platform for HR that unites your people, fuels your culture, and supports your teams to be more effective and productive. Streamline onboarding, integrate your HR systems, master compliance, and drive a self-service approach that empowers employees with the tools and information to thrive at work.
 - o Attract and retain top talent - Attract the best of the best with innovative digital experiences that represent your brand and drive home your culture. Promote internal mobility with dedicated widgets and keep employees connected with a business vision that unites and inspires.
 - o Power learning and development - Support employee growth with an agile platform that lets you create learning portals that land. Aggregate training videos, collate key documents, integrate 3rd party portals and utilize quizzes for an intuitive experience that supports upskilling across the enterprise.
 - o Fuel a culture of recognition - Cultivate a culture of appreciation with native reward and recognition features that put employee achievements front and center. Celebrate your culture with value-aligned recognition that maps to your ethos. Encourage peer-to-peer recognition with kudos and leaderboards that make sure no-good deed goes unrecognized.
- **MIS**
 - o Deliver world-class digital employee experience. Accelerate our strategic digital transformation and drive employee satisfaction with a platform that will make internal communications more accessible to staff.
 - o Unburden our MIS department - Empower our amazing communicators and other departments to create pages and sites with an intuitive technology that lets them take control. There is a developer framework should we desire to change things in the future or customize.
- **C- Suite**
 - o Build trust with leadership comms - Connect and engage your employees with authentic communication that unites your entire workforce behind a compelling vision. Take advantage of new channels and formats to build trust and transparency into your comms.
 - o Make communication a two-way street - Give your employees a direct line to leadership by offering feedback through two-way dialogue. Build a channel between employees and the C-Suite through feedback forms, polls, and surveys, allow them to provide valuable insights on their working experience.



Engage a flexible workforce - Deliver timely, personalized communications that cut through the noise and reach your employees when they're primed to engage. Unite your diverse workforce by delivering consistent comms, translated into hundreds of languages, and available on any device, all from one central platform.

- o Inspire a culture of inclusion and recognition - Set the tone for a high-performance culture where every voice is valued, and good deeds get recognized right the way up the chain. Reach employees across borders and connect with your most disconnected workers with mobile experiences that bring everyone into the fold.
- o Keep sensitive information secure- Securely share sensitive documents and information with private and secret channels. Use targeted to deliver secure messages on a need-to-know basis. Provision access to confidential projects and data for only those users with granted permission, meaning developments stay under wraps until ready for the public eye.

B.. System Requirements

- Cloud-hosted, single source, with fully integrated database
- Customizable, single report writer for all aspects of the system
- Ability to import/export reports using Microsoft Excel
- Option for 100% paperless processing
- Dedicated project implementation team that will support all needs of the Center.
- For Full list of requirements, see **“EXHIBIT-A-AGENCY INTRANET Requirements-Vendor- Response”**.

C. Maintenance Agreement/System Upgrades

- Proposals must specify the process involved in system upgrades as well as frequency of major release updates, service packs, legislative updates, product life cycle, and end-of-life production.
- Cost of system software version upgrades must be included in the master agreement.
- Training must be provided during the initial project implementation phase.
- Training materials and release notes must be provided for updates/upgrades.
- Configuration customization must be available. Potential costs must be outlined. This may include, but not limited to, custom reports, custom input fields, interfaces, etc.

D. Sales, Service and Technical Support

Sales and service support must allow unlimited and immediate access to 24/7 support. A phone number, web portal address and email address for all support needs should be provided by the vendor. A sales and support manager contract should be provided with defined SLAs with penalties for failure to meet requirements within the SLAs



Term

The Center anticipates a 3-year contract for services with option of extension for up to five years. As you evaluate your approach to provide services, you are encouraged to recommend contract options and address the relative advantages and disadvantages of your recommendations. Contract duration must allow early termination without penalties to LifePath Systems in the event the Texas Health and Human Services Commission terminates revenue contracts to the Center. The contract can also be terminated for cause.

Fee

The following is a guide for splitting the fee into sections that clearly identify the acquisition/start-up costs versus ongoing solution fees. Although it is not intended to be absolute, significant deviations should be closely reviewed.

A. Fee Matrix

Having examined specifications and requirements of this RFP (including any attachments and published answers to questions), the undersigned proposes to furnish Work upon the pricing terms quoted below:

Deliverable Description	Costs	Comments
Software License or Subscription		
Software Maintenance/Support (specify pricing/coverage levels offered)		
Implementation Services		
Training & Materials		
Third Party Software		
Third Party Software Support		
Total Year 1 Price		

B. Maintenance Fees

Responses must clearly articulate the anticipated LifePath Systems internal resources necessary for a successful project. Responses must distinguish between implementation and ongoing support after implementation.

Description	Estimated Costs	Comments
Year 1 – Maintenance & Subscription Fees		
Year 2 – Maintenance & Subscription Fees		
Year 3 – Maintenance & Subscription Fees		



Submittal Schedule

Task	Date
RFP Issued	10/16/2023
Questions are due	10/27/2023
Questions answered via addenda	11/1/2023
RFP Submittal Deadline	11/10/2023
Proposal Review	11/13/2023- 11/24/2023
Tentative Presentation/Demonstration by selected vendors (3 finalists)	11/27/2023- 12/1/2023
Final Vendor Discussions	12/4/2023- 12/15/2023
Evaluation Team FINAL RECOMMENDATION to Board of Trustees	1/5/2024
Board of Trustees Approval	1/25/2023
Contract Signed	1/26/2023
Project Start <i>(available project team members)</i>	1/31/2023

Proposal Deadline

Request for proposal packets may be obtained on the Center’s website, www.lifepathsystem.org/contractingopportunities . Responses to the Request for Proposal (RFP) must be received by the Center by 10:00 am CDT 11/10/2023. If you are submitting an electric copy via email, your attachment must include the RFP number, your company name and the date it was sent. If you mail your proposal, it must be postmarked prior to the submission deadline. Mail to:

LifePath Systems
 ATTN: Willy Villavicencio
 1515 Heritage Dr.
 McKinney, TX 75069



Proposal Instructions and Format

Along with a copy of your standard contract, which will be subject to review, negotiation, and possible revision, please include the following items in any Proposal submitted in response to this RFP:

1. Company name, address, phone, and email address.
2. Describe your company's background, ownership of your company and list its principal shareholders.
3. Describe your company and how it is organized, including its overall size in numbers of employees.
4. Describe the practicing ideas or themes that serve as the central organizing elements of your company's practice as related to the compliance management software.
5. Provide names and titles of key personnel who would be directly responsible for the work.
6. Please submit key reference contact information including telephone numbers, fax numbers and email addresses.
7. Submit an organizational chart for the entire recommended Team for this project as referenced in item 3 above.
8. Describe the process by which you will develop implementation and deployment services for a typical project.
9. Describe your approach to maintenance services that will ensure the functional, technical and requirements are satisfactorily addressed.
10. Explain the management tools, techniques, and procedures your team uses to maintain the project schedule between implementation and go live date.
11. Explain your team's procedures for documenting quality control and coordination of the various disciplines of work amongst your company.
12. Describe the company's support services and the advantages to each tier and /or level, if any.
13. Explain in detail the services provided by your company regarding software education and ongoing training. What methods does your company use.
14. Explain the hosting services, if any, available from your company.
15. Explain why you believe your team is the most qualified firm to provide the requested services for this Project.

Proposals are expected to provide complete and detailed descriptions of the vendors' abilities to meet the requirements of this RFP and must be submitted in either MS Word or PDF format.

Questions regarding this RFP must be sent by email prior to close of business (5:00 pm CDT) on 10/27/2023 to: Willy Villavicencio wvillavicencio@lifepathsystems.org. Answers to all submitted questions will be posted on the LifePath Systems web site: <https://www.lifepathsystems.org/connectwithus/contracting>

Proposals which do not meet the criteria below will not be evaluated by LifePath Systems.

The proposal must include a cover letter that provides:

- a. RFP Title.
- b. Confirmation that proposed fees are firm and guaranteed for 90 days from the proposal due date.
- c. A STATEMENT CONFIRMING THAT YOU HAVE READ, UNDERSTAND, AND AGREE TO THE GENERAL AFFIRMATIONS LOCATED AT:
<https://www.lifepathsystems.org/wp-content/uploads/2021/05/General-Affirmations.pdf>
- d. Signed by a representative authorized to commit to the terms of the proposal.



The selected vendor will be required to adhere to all Texas contract and confidentiality requirements.

Your response may also contain any narrative, charts, tables, diagrams, or other materials in addition to those called herein; to the extent such additions are useful for clarity or completeness of the response. Attachments should clearly indicate on each page the paragraph in the RFP to which they pertain. The Center will not be liable for any errors in your proposals.

No modifications to your proposal will be accepted except during negotiations initiated by the Center.

The request for proposals and potential inclusion into the demonstration process shall in no way be deemed to create a binding contract or agreement between the respondent and the Center. Upon recommendation of the vendor, the Center will enter into an agreement. If the Center and successful respondent are unable to reach agreement upon a contract, the Center reserves the right to immediately enter into negotiation and agreement with another respondent.

Any verbal communication will be considered unofficial and non-binding regarding this RFP and subsequent award.

Each respondent submitting a Proposal in response to this RFP acknowledges and agrees that the preparation of all materials for submittal to the Center and all presentation, related costs, and travel expenses are the respondents' sole expense as the Center shall not, under any circumstances, be responsible for any cost or expense by the respondent.

The Center shall be allowed to keep all materials submitted by the respondents regarding this RFP. Each respondent agrees to hold the Center harmless against any expenses, damages, and claims arising from or connected with your proposal, including patent, trademarks, copyright, or other intellectual property infringement or misappropriation.

Any media request of the respondents shall be concurrently directed to the Center during the receipt, analysis, selection, and subsequent contract negotiation until said contract is signed and delivered by the Center.

The Center reserves the right to accept or reject any or all proposals, to alter the selection process in any way, to postpone the selection process for either party's own convenience at any time, and to waive any defects in proposals submitted. The Center reserves the right to issue addenda to this RFP at any time due to the need for clarification, change in schedule, or other reasons the parties so decide. The Center reserves the right to accept or reject any individual sub-consultants that the successful respondent proposes to use.

Your proposal constitutes an offer that remains open and irrevocable for a period of no less than 90 days unless your proposal states otherwise. Proposals after the award are public documents.



Selection Criteria

The selection and approval of the Proposer will be made in accordance with the Center's competitive bidding and selection process. An evaluation committee will evaluate proposals based on the guidelines set forth in this RFP and will present its findings to the Center's Management. LifePath Systems reserves the right to request additional information and clarification of any information submitted, including any omission from the original proposal. All proposals will be treated equally regarding this item.

LifePath Systems intends to solicit, evaluate, and negotiate proposed terms from qualified Proposers to determine which proposal will serve the best interests of the organization by providing the best value¹. Once it is determined that a proposal meets the requirements, the LifePath Systems evaluation team will score each proposal. In determining best value for the organization, LifePath Systems will consider:

1. The purchase price.
2. The reputation of the proposer and of the proposer's goods or services.
3. The quality of the proposer's goods or services.
4. The extent to which the goods or services meet the Center's needs.
5. The proposers past relationship with the Center.
6. The impact on the ability of the Center to comply with laws and rules relating to contracting with historically underutilized businesses and nonprofit organizations employing persons with disabilities.
7. The total long-term cost to the Center to acquire the bidder's goods or services; and any relevant criteria specifically listed in the request for proposals.

The Center will review and create a short list of the number of vendors to provide a demonstration of their system. Those vendors that are invited to demonstrate will be expected to have the key project personnel available for demonstration between 11/27/2023-12/1/2023. Times for individual demonstrations will be announced later but respondents will tentatively be provided with a block of 90 minutes for presentation and questions. Representatives for the Center will be in attendance for the demonstrations. Demonstrations will be conducted virtually, unless otherwise stated by the Center.

¹ Texas Local Government Code §252.043(a)(b) Award of Contract



Assurances, Certifications, Exhibits and Attachments

Vendor must submit the Assurance and Certifications and all Attachments requested, to include:

Vendor will submit a copy of their standard contract, along with proposal and "EXHIBIT-A- LPS AGENCY INTRANET Requirements-Vendor-Response". Label this (Attachment A)

Signature Page (Attachment B)

Resident/Non-Resident Certification (Attachment C)

Assurances Document (Attachment D)

Conflict of Interest Questionnaire (Attachment E)

Vendor shall review Texas Administrative Code §412.54(c) and provide a written response signed by Authorized Individual (Attachment F)

Vendor shall review Texas Health and Safety Code §250.006 and provide a written response signed by Authorized Individual (Attachment G)

Form W-9 (Attachment H)

Lobbying Certification (Attachment I)

Deviation Form (Attachment J)

Questions or Inquires

All questions must be submitted electronically no later than 5:00 pm CDT on 10/27/2023.

LifePath Systems

Willy Villavicencio, Purchasing Manager

Email: wvillavicencio@lifepathsystems.org

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the LifePath Systems Purchasing Department**



**ATTACHEMENT B
SIGNATURE PAGE**

The attached proposal application is being submitted in response to the AGENCY INTRANET (AI) RFP #0130. The proposal is a firm offer and shall remain an open offer, valid ninety (90) days from the date of this document.

LifePath in its sole and absolute discretion shall have the right to award contracts for any or all materials listed in each proposal, shall have the right to reject all proposals and shall not be bound to accept the lowest proposal and shall be allowed to accept the total proposal of any one vendor. I understand that this proposal will be reviewed and evaluated according to the procedures indicated in this RFP.

Authorized Signature

Company Name

Typed or Printed Name

Street Address

Title

City, State, Zip Code

Telephone Number

Fax Number

Email



ATTACHMENT C
RESIDENT/NON- RESIDENT CERTIFICATION

Contractor must answer the following questions in accordance with the **Texas Government Code §2252.002**, as amended:

A. Is the Contractor that is making and submitting this bid a “resident Contractor” or a “non-resident Contractor”?

Answer: _____ Resident Contractor _____ Non-resident Contractor

(1) Texas Resident Contractor - A Contractor whose principal place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

B. If the Contractor is a “Non-resident Contractor”, does the state in which the Nonresident Contractor’s principal place of business is located have a law requiring a Nonresident Contractor of that state to bid a certain amount or percentage under the bid of a Resident Contractor of that state in order for the nonresident Contractor of that state to be awarded a contract on his bid in such state?

Answer: Yes _____ No _____ Which state? _____

C. If the answer to Question B is “yes”, then what amount or percentage must a Texas Resident Contractor bid under the bid price of a Resident Contractor of that state to be awarded a contract on such bid in said state?

Answer: _____



ATTACHEMENT D ASSURANCES DOCUMENT

The vendor assures the following:

1. All addenda and attachments to the RFP as distributed by the Local Authority and designated by the checklist have been received.
2. No attempt has been or will be made by the vendor to induce any person or vendor to submit or not to submit a Proposal, unless so described in its Proposal.
3. The vendor does not discriminate in its services or employment practices based on race, color, genetic information, religion, sex, national origin, disability, veteran status, or age.
4. All cost and pricing information is reflected in the RFP response documents or attachments.
5. The vendor accepts the terms, conditions, criteria, and requirements set forth in the RFP.
6. The vendor accepts the Center's right to cancel the RFP at any time prior to Contract award.
7. The vendor accepts the Local Authority's right to alter the timetables for procurement that are set forth in the RFP.
8. The Proposal submitted by the vendor has been arrived at independently without consultation, communication, or agreement for the purpose of restricting competition.
9. Unless otherwise required by law, the information in the Proposal submitted by the vendor has not been knowingly disclosed by the vendor to any other vendor prior to the notice of intent to award.
10. No claim will be made for payment to cover costs incurred in the preparation of the submission of the Proposal or any other associated costs.
11. Local Authority has the right to complete background checks and verify information.
12. The individual(s) signing this document and any Contract awarded to vendor is authorized to legally bind the vendor.
13. No employee of the Local Authority and no member of the Local Authority's Board will directly or indirectly receive any pecuniary interest from an award of the proposed Contract to vendor. If the vendor is unable to make the affirmation, then the vendor must disclose any knowledge of such interests. See Attachment F.
14. The vendor is not currently held in abeyance or barred from the award of a federal or state contract.
15. The vendor is not currently delinquent in its payments of any franchise tax or state tax owed to the state of Texas, pursuant to Texas Business Corporation Act, Texas Civil Statutes) Article 2.45.
16. The vendor shall disclose whether any of the directors or personnel of Proposer has either been an employee or a trustee of the Local Authority within the past two (2) years preceding the date of submission of the Proposal. If such employment has existed, or at term of office served, the Proposal shall state in an attached writing the nature and time of the affiliations as defined. See Attachment F.
17. The vendor shall identify in the attached writing any trustee or employee of Local Authority who has a financial interest in the vendor or who is related within the second degree by consanguinity or affinity to a person having such financial interest. Such disclosure shall include a complete statement of the nature of such financial interest and the relationship, if applicable. See Attachment F.
18. No former employee or officer of the Local Authority directly or indirectly aided or attempted to aid in procurement of vendor's service.



19. The vendor shall disclose in an attached writing the name of every Local Authority employee and/or member of Local Authority's board with whom the vendor is doing business or has done business during the 365-day period immediately prior to the date on which the Proposal is due. Failure to include such a disclosure will be a binding representation by vendor that the natural person executing the Proposal has no knowledge of any key persons with whom the vendor is doing business or has done business during the 365-day period prior to the immediate date on which the Proposal is due. See Attachment F.

20. Under Section 231.006, Family Code, the vendor, or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated, and payment may be withheld if this certification is inaccurate. For purposes of the foregoing sentence, "vendor or applicant" shall mean vendor; contract, bid or application shall mean the Proposal; and "this contract" shall mean any Contract awarded to the Successful vendor(s).

Signature of Applicant or Applicant's Authorized Representative

Date Printed

Name

Title (if applicable)



**ATTACHMENT E
CONFLICT OF INTEREST QUESTIONNAIRE**

Please retrieve CIQ Form from the following website:
<https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf>
(Attach completed CIQ Form as part of your proposal)

A signature is required in Box 7 regardless of any other entry on the form.

**ATTACHMENT F
DISCLOSURE OF KINSHIP**
Pursuant to the Texas Administrative Code §412.54(c)

**ATTACHMENT G
NOTICE OF FELONY CONVICTION**
Pursuant to the Texas Health and Safety Code §250.006

**ATTACHMENT H
FORM W-9
REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION**
Vendors are to complete a W-9 Form and submit with Proposal Documents.
<http://www.irs.gov/pub/irs-pdf/fw9.pdf>



**ATTACHMENT I
LOBBYING CERTIFICATION**

The undersigned certifies, to the best of his or her knowledge and belief that:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or an employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress an officer or employee of Congress or an employee of a member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of the fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature

Date

Print name of Authorized Individual

Title of Authorized Individual

Organization Name



**ATTACHMENT J
DEVIATION FORM**

All deviations to this RFP must be noted on this sheet. In the absence of any entry on this Deviation Form, the prospective vendor assures LifePath of their full agreement and compliance with the Specifications and Terms and Conditions.

Each response to this RFP shall contain a Deviation Form, which states the prospective Vendor's commitment to the provisions of the RFP. An individual authorized to execute contracts must sign the Deviation Form. Any exceptions taken to the terms and conditions identified in this Proposal must be expressly stated in the Deviation Form. Use an additional copy or page if needed.

THIS DEVIATION FORM MUST BE SIGNED AND SUBMITTED WITH THE RFP BY EACH PROSPECTIVE VENDOR/CONTRACTOR WHETHER THERE ARE DEVIATIONS LISTED OR NOT. IF NO DEVIATIONS, NOTE: NONE

Reference Specifications, Terms and Conditions and Page Number	Deviation

Company Name

Authorized Signature

Date



NOTICE "NOT TO PARTICIPATE" FORM

Dear Vendor:

Please check the appropriate box below, complete the remainder of this form and return it PRIOR to the scheduled due date and time on the Proposal.

- Our Company cannot provide the products, supplies and/or services listed in this request. Please MOVE our name and address to the following services so that we may submit bids/proposal at a later date:

Services:

- Our Company has chosen NOT to submit a Proposal at this time but would like to remain on your list for this Proposal category. We did not submit a Proposal because:

Reason:

- Please REMOVE our Company name from all LifePath Systems lists until further notice.

Company Name: _____

Representative: _____ Title: _____

Address: _____ Phone: _____

Email: _____ Other: _____

.....

Authorized Signature: _____

Title: _____ Date: _____

“EXHIBIT-A-LPS AI RFP Requirements-Vendor-Response”

Please use the following matrix as a key for responding to the functionality tables below. Exhibit A must be included in the proposal.

<i>Requirements</i>	Yes/No
Accessibility	
Accessible via mobile on iOS and Android	
Accessible on iPad	
Desktop Version available	
All functions are available across all versions (e.g., search across all content types).	
I can see all pages responsively in the browser of my mobile device.	
Can it run on a digital signage or tv monitors?	
Are there Push Notifications/Alerts? (Desktop + Mobile)	
The platform has flexible design functions allowing for branding in-line with Corporate Design guidelines.	
How many/ and which languages are offered in the UI?	
How many/which languages are offered for content?	
It is possible to have a personalized homepage	
Does your platform provide features for users with disabilities? (e.g., Vision impaired etc.)	
UI / UX	
Page and article layout can be customized without CSS, in a WYSIWYG fashion	
Corporate branding can be easily defined in an admin interface	
Custom branding can be displayed in the mobile app	
Global and local layout templates can be created	
The layout is HTML5 and responsive.	
Is there a visual alert function visible on all pages?	
Is there a notification center for all notifications?	
There can be multiple levels in the navigation	
Roles and Rights	
Admins can create roles that have the authorization to change layouts	
External users can be invited to a private space within the platform	
Are there different Roles like for example Space Manager, Content Manager for the Space, Contributor, Commenter and Viewer?	
Employee Directory	
User can find an employee by name, email, department, office, and connection to LDAP / AD is possible	
I can see an organization chart and find people's direct reports.	
User can start communication directly from profile (Call, email, hangout G Suite connection)	
User can edit certain attributes (if allowed by admin) in their profile	
Platform has integration to various HR platforms (e.g., Workday, SAP etc.)	
User profiles are constantly synced with Google Profile	
Users can access the employee directory in the mobile app	

Authentication	
Google SSO is offered as a standard	
The authentication is via Google ID	
The admin can configure the roles & rights for different profiles.	
Authentication is via OAuth2 or SAML2.0	
Platform offers 2-Factor authentication for all users	
Sub Pages	
Sub sites (Areas) can be created with different branding from the main site	
Separate local admin rights can be provided to those subsites (Areas)	
An admin can determine relationship between the different sites/areas (e.g., parent child).	
The Site-Subsite/Area hierarchy can be well visualized	

	Yes/No
Search	
Users have access to a global search	
Search includes Google Drive files, contacts, 3rd party apps, etc.	
User can search based on dates and intervals	
Search for Documents and files can be filtered by predefined tags, content type etc.	
Search results provide a personalized results based on user profile	
Search can define whether it is public content and does not show a user's private content	
I can save content (articles, documents etc.) in a "My Favorites" section	
A dedicated page for news and/or knowledge base repository can be set	
Does your platform support (or will) Google Cloud Search?	
Search can also include Sub-Sites/Areas if allowed by admin	
Content	
Editorial + Publishing	
Can articles or messages be scheduled for publishing?	
Can messages/news articles be targeted by team, department, geography, hierarchy level?	
Messages/news articles can be segmented by device (desktop vs mobile)	
Can articles be created in multiple languages? (Which languages are offered?)	
Is there a translation workflow for multiple languages for articles?	
Is there a content approval workflow for news articles?	
Can multiple approval workflows be created?	
Can multi-step approval workflows be done?	
Is there an editorial content calendar function?	
Tags or metadata can be set for articles that are published	
Branding	
Page templates for news articles can be created	
CI fonts can be enforced as a primary font for articles	
Rich Media	
Does your platform offer its own video player?	

Is it possible to embed a live video feed in a page? (What platforms supported?)	
How does the platform handle audio?	
Is it possible to embed audio? (e.g., Soundcloud, Spotify)	
Audio files can be played directly on the platform/app without the need to download it	
Is there a rich text editor in the application?	
An author can insert media and different format of pictures	
Insert videos, table, hyperlinks, and anchors without programming	
All G-Suite formats can be embedded into articles and shared in posts	
Please specify media file types that can be uploaded (video, images, audio etc.)	
Can HEIC images be uploaded for use?	
Newsletter	
The platform has a newsletter functionality	
The Newsletter can allow the author to select a digest of articles from around the platform	
The newsletter has its own design elements to keep with corporate branding.	
The newsletter has its own analytics (e.g., Open rate, CTR etc.)	
Personalization	
Users can define their own content based on their own interests	
Author can select if content is visible to one or more audiences.	
An admin can predefine metadata or tags for authors to choose from	
Engagement	
Can comments/likes be enabled on a per article basis?	
Comments can be left on articles	
Other users can comment further on main comments	
Content can be shared further inside the platform (private messages, groups etc.)	
Content can be shared externally on social media if authorized (e.g., FB, TW, LI)	
There is a poll/survey function that can used in various areas of the platform	
Author/commenter is notified if there is a comment or action on their content	
User can adjust notification parameters (when and how often they receive alerts)	
Your platform offers some form of gamification feature for rewards and recognition?	
There is a built-in form functionality for feedback and user input	
Events	
There is an "Events" function or widget	
A user can add an event directly to their calendar	
An event can be set to a specific date, time and location	
Event can have a description and include various files	
Social Features	
User can "follow" content from certain authors or tags/topics and be notified when they are published	
User can set and follow interests and topics	
User can define and build their own feed in a portion of the page.	
There are gamification features to set badges for users to encourage and reward engagement	
User can "mention" another user in a comment or within an article	

User gets alerted when they are "mentioned"	
Groups/Communities	
Admin can set whether users can create groups or not	
There are templates for the design of group pages	
Group or community has access to all other productivity tools like for example Google Docs and Web CMS? Landing pages connection would be great.	
Group calendars and documents can be shared to single users etc.	
External users (non-E&V) can be added to groups/communities	
Comments can be moderated by admins	
Groups can be closed and archived	
Reporting	
Does the system offer standard reports for user activity?	
Can reports be configured to send to a specified group of people on a continual basis by email?	
Do you provide "adoption" analytics for the platform?	
Can you measure registered vs active vs engaged users?	
Are there detailed content analytics?	
It is possible to measure user engagement based on roles	
Based on country/location	
Based on department	
Views per article	
Article engagement (e.g., Likes, Comments, Shares)	
Show performance based on device (desktop vs mobile)	
Are there analytics around Chat, Messaging, or other social functions?	
Are there analytics around "Social Activity"?	
Is your reporting compliant with GDPR? (i.e., ensuring that all interaction is anonymous)	
Do you provide benchmark analytics (against similar customers)?	
Can the reporting be exported to Google Sheets/Excel or other BI systems?	
Analytics can be filtered (e.g., based on time period, user groups, content types)	
<i>Requirements</i>	
Architecture	
Is your solution a SaaS solution or a hosted solution?	
In what country is your solution hosted?"	
What is the installation/deployments tasks?	
Besides project implementation costs, all costs are included into the subscription fee?	
Please include the standard application SLA of your solution.	
Please attach a diagram with the technical infrastructure	
Do you have an EU tenant?	
Is there unlimited data storage offered?	

What is your uptime reliability? (Do you have a page to continuously see status?)	
API	
Do you offer a Java API, Java library or REST call capability? (For the triggering of our internal system actions)	
Do we have the possibility to develop interfaces?	
Does your Mobile application use the application native APIs.	
What type of security do you use/recommend connecting to your APIs?	
Are the APIs publicly available? If so, please provide a link	
Do you have a list of API integrations that you offer?	
Can your CMS be used to deliver content to other services and platforms?	
Groups connectivity	
Active Directory User Groups/Roles and Rights should be recognized by the system via LDAP/AD connection to the tool	
Support	
Please provide your Support SLAs	
Do you offer any kind of Service Desk as a Single Point of Contact (SPOC) in addition to the 2nd- and 3rd-Level-Support?	
Do you provide a communication matrix, which includes who should be contacted in which situation? (e.g., contact person, responsible person etc.)	
Are the roles and responsibilities regarding the incident process defined, implemented, and communicated?	
Do you have 24/7 support to solve issues that may arise?	
Are appropriate service hours exactly defined? (e.g., instead of 5x12 [5 days, 12 hours]: Hamburg working days Monday to Friday 7 am to 7 pm local time)	
What is your average response time?	
What is your process to provide Level 1 support?	
In what countries do you offer your support functions? (e.g., North America, Europe, Middle East)	
In what languages do you offer support functions?	
Do you ensure that an interrupted service will be restored in an appropriate time (Meantime to Restore)? - <= 2 hours"	
How many scheduled maintenance downtimes you have over the course of a year?	
How long is the lead time you inform in advance for upcoming, planned maintenance and what is the time frame for maintenance.	
Do you regularly test the application for issues before you release a new version?	
Do you capture and document all incidents? Is there an audit trail of changes within our system instance?	
Do you classify and prioritize incidents regarding their importance, urgency and impacts?	
Do you have a rollback plan for any major update deployments?	
Do you have a deployment strategy that can scale 10x of your current userbase?	
How are new versions of your product communicated to end users/clients?	
Can you explain your back up and data recovery process?	
Security	
Do you have an Information Security policy that is regularly reviewed?	
Do you have a clearly defined Incident Response & Risk Management policy?	
Describe your data-at rest encryption methods.	
Do you use TLS?	
Does your platform offer 2-Step authentication?	

Can you require mobile devices to be secured? (e.g., Passcode or Fingerprint)	
What is the scope of access required to G-Suite?	
What measures do you take to test your security?	
Do you publish the results?	
Do you make your security logs available?	
Do you follow Google OAuth, OpenID, Google APIs and SSO best practices?	
Please give a brief description of your security team and their roles	
Please describe your access model and processes how the solution is administrated from you as the vendor.	
Do you have ISO 27001 certification?	
Where is customer data stored? If with a 3rd party, please advise the name of the provider and country of storage	
Do you provide a DPA (Data Protection Agreement) that is GDPR compliant? Please provide any relevant documentation related to such	
Do you have a defined Global Risk Management in place?	
Can you provide a list of sub-processors?	
Do you provide a Business Continuity and IT Service Continuity plan each time a service or infrastructure change will be done?	
Is the management network separated from the productive network and is remote management only done via out-of-band solutions as well as by using encryption protocols?	
Does the provider manage (grant, deny, change) role-based access permissions every time the status of a provider's employee or 3rd parties' employees changes and checks them on a regular basis?	
Are principles und measures in place to protect the whole cloud infrastructure against Distributed Denial of Service (DDoS) attacks?	
Compliance	
Do you do internal audits to ensure that all your technical and security measures are effective, and any vulnerabilities are exposed and fixed?	
Do you engage accredited third parties to periodically audit your internal security controls?	
Do you insist on audits of your third-party providers?	
Are the location and the safekeeping period of the data in line with special laws regarding the type of data? (e.g., individual-related data)	
Does the provider ensure that data exchange with third parties in a non-EU-country or authorities won't be done?	
Do you have a named DPO (Data Privacy Officer)? Please provide their contact details in case of need	
For transparency - do you disclose the location(s) of data storage?	
Please provide documentation related to your compliance to GDPR	



Pricing, Implementation, Services	
Can you provide a fully transparent and detailed pricing and any additional costs that may be incurred from implementing an intranet solution, including, but not limited to, training, support, emails, etc.	
Do you provide a dedicated implementation manager and training program to help us go live? Are there enablement offerings available including integration consulting, on-site implementation, coaching, and other services?	
Please provide a typical timeline for implementation. How long does a basic technical integration take?	
Can you provide regular ongoing sessions for industry updates, business reviews, and strategic planning?	
What does your initial training schedule for the tool look like?	
If your pricing is based on cost per user, please describe what a "user" can be considered as.	
Is support included in the annual costs?	
On our side, what sort of employee profiles will be required for the project? (e.g., Developers, Project Managers etc.)	
Please advise what costs may arise for the development of customized scripts or widgets	