# ATTACHMENT B

**Management Questions**

Proposers are required to answer all of the questions listed in Attachment B in the format that is provided. Questions are listed in tan fields and answers should be typed in the white space below, which can expand to fit any length. Answer questions in the following order and answer all questions fully.

Note: that responses to Questions in **Part 6** will only be required from the Proposers if they are among the highest ranked Proposers and deemed to be in the Competitive Range.

**1. Company Information and Qualifications**

Provide a brief executive summary that includes an overview of your company, company’s qualifications for this project, and any noteworthy information, in addition to the information requested below:

|  |  |
| --- | --- |
| 1. Name of Company | |
|  | |
| 1. Address of Office Serving Project | |
|  | |
| 1. Length of Time in Business | |
|  | |
| 1. Primary Contact Name | |
|  | |
| 1. Primary Contact Phone | |
|  | |
| 1. Primary Contact Email | |
|  | |
| 1. How many employees can support the proposed solution? | |
|  | |
| 1. How many employees provide Implementation Services for the proposed solution? | |
|  | |
| 8b) "What are the anticipated resource requirements from King County, including the number of personnel, required skill sets, levels of expertise, and expected time commitments throughout the duration of the project? | |
|  | |
| 1. Do you plan to use any subcontractors or contracted staff with this project? If yes, provide the following for all subcontractors, and attach resumes detailing experience and qualifications: | |
| Contractor name:  Address:  Phone:  email:  Provide documentation showing subcontractor(s) as licensed  **2. Software as a Service (SaaS) or Commercial Off-The-Shelf (COTS**  King County Prosecuting Attorney’s Office (PAO) is considering both SaaS and COTS solutions. If your firm currently provides a web-based SaaS or COTS solution, please fill in the information requested below.   |  | | --- | | 1. Do you offer a SaaS or COTS? If so, describe how the hosted solution is managed, how is it accessed by King County Prosecuting Attorney’s Office (PAO). | |  | | 1. If this service is not provided at this time, do you have any plans to provide it in the next five years? | |  | | 1. What means are you using to secure KCPAO data? | |  | | 1. King County requires any disaster recovery site to exist in the continental United States. Additionally, the site must be a minimum of 500 miles from the primary site. Explain the company’s disaster recovery systems plan (backups, high availability, DRP, alternative, others, location of both primary and backup sites). | |  |   **3. Training**   |  |  | | --- | --- | | 1. Describe in detail the types of training you provide for the following users including training, participants, length of training, etc.    1. Business-side administrator – Workflow configuration options, code table entry, business rule configuration, forms/document/template creation, reports creation, etc.    2. End-user – Tailored to business functions (heavy data entry, role-specific, queries, and reporting)    3. Other types of training provided | | | a)  b)  c)  d) | | 1. Describe the training methodology your company utilizes (direct training by company staff, train-the-trainer, computer-based, practicum, etc.). How much hands-on training do you recommend before going live? | |  | | 1. Provide details on the number and type of classes you recommend, the number of students, required facilities and tools, etc. | |  | | 1. Describe the training materials you utilize – manuals, online help, quick reference guides, etc. Attach copies where possible as Attachment B #1. | |  | | 1. Provide a copy of an actual training plan that you have utilized in implementations for other customers of similar size and complexity. Provide as Attachment B #2. | |  | | 1. Describe the assistance and training provided during Go-Live (first week) and Final Acceptance Testing period (first 90 days) to ensure that users are successfully using the new system. | |  |   **4. Documentation**   |  | | --- | | 1. Describe the other reference material and documentation you provide, including:  * Interface documentation * Reports creation manuals * Forms/documents/template documentation * Data dictionary * Entity relationship diagrams * Business process documentation * Any other documentation provided to the customer   Attach examples of each as Attachment B #3. | |  | | 1. Describe the documentation you provide with new releases of the software (e.g., user manuals, “what’s new” guides, etc.) | |  | | 1. Provide a detailed project plan, including key milestones, deliverables, resource allocation, and risk mitigation strategies, to ensure successful go-live a stated in Section 3.2 Timeline and 3.4 Section. Attach the project plan as Attachment B #4. | |  | | |

**5. Reference Information**

The information below is required.

|  |  |
| --- | --- |
| 1. How many customer sites have deployed the proposed solution in the production environment? Attach a sample list of customers as Attachment B #5. | |
|  | |
| 1. How many new installations of the proposed solution have you completed in 2021, 2022, and 2023 (completion means that the customer is now using the solution in the production environment)? Provide 2024 data if available. | |
|  | |
| 1. What is your customer retention rate? In your response, please include the years you have factored in. | |
|  | |
| 1. Have you ever had a customer terminate mid-project due to your firm’s non-delivery of work, failure to perform, or failure to comply with the provisions of the contract? List the customer(s) and contact information and explain the circumstances for each termination. | |
|  | |
| 1. How many customers have terminated in the last five years? Provide a list of customers with contact information and reason(s) for termination. | |
|  | |
| 1. Does the company have any pending or actual litigation against it relating to the proposed solution? If yes, provide details of each suit including status and any outcomes. | |
|  | |
| 1. What are your **largest 5** customer **sites** (in terms of # of users and complexity of installation)? | |
| A) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| B) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| C) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| D) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| E) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |

|  |  |
| --- | --- |
| 1. Provide references for at least **5 customers** with **installations most comparable** to the solution proposed to the County: | |
| A) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| B) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| C) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| D) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |
| E) Customer Name |  |
| Address |  |
| Contact Name |  |
| Title |  |
| Phone |  |
| Email |  |
| Solution date in production |  |
| Solution version |  |
| Number of users |  |
| List all Interfaces with other Systems |  |
| Briefly describe functionality |  |
| Solution (COTS/SaaS) |  |

**6. Financial Information**

**(Will only be required of the Highest Ranked Proposers)**

The information below will be required for the short list of finalists. There is no need to submit this information at the first round of the RFP. The County will notify proposers when this information is required.

|  |  |  |
| --- | --- | --- |
| 1. Company Financial information for *at least* the last 3 fiscal years: | | |
| Year | Annual Gross Revenue | Net Profit ( as % of gross) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 1. Attach a copy of the company’s latest audited financial statements for *at least* the last 3 fiscal years. This includes statements of income and stockholders’ equity, balance sheets, and statements of cash flow, notes to financial statements, independent auditors’ reports, annual reports to stockholders and SEC Form 10K reports (for publicly held corporations). Provide as Attachment B #6. | | |
|  | | |
| 1. Certification by the chief financial officer or the Proposer’s independent auditor stating that the Proposer has **adequate financial resources** for the prosecution and completion of the work called for hereunder. Provide as Attachment B #7. | | |
|  | | |
| 1. The names, addresses, e-mail addresses, telephone and fax numbers of at least one contact person from the Proposer’s principal **financial or banking organization** and the Proposer’s independent auditor. The contact persons shall be duly authorized by the Proposer to provide information and discuss the adequacy of the Proposer’s financial resources. Upon the County’s request, the Proposer shall provide written authorization permitting the County or its designee access to information documenting the adequacy of the Proposer’s financial resources. Provide as Attachment B #8. | | |
|  | | |
| 1. A current copy of the Proposer’s Dun and Bradstreet report(s), if requested by the County. The County reserves the right to audit the Contractor throughout the term of this contract to assure the Contractor’s financial fitness to perform and comply with all terms and conditions contained within this contract. King County will be the sole judge in determining the Contrac-tor’s financial fitness in carrying out the terms of this contract. Provide as Attachment B #9. | | |
|  | | |