

SPECIFICATIONS

Information Technology Consulting Services for Harris County Universal Services

SCOPE

Harris County is seeking proposals from qualified vendor(s) for Information Technology Consulting Services, as described herein. The term shall begin on or about September 1, 2025 and ending twelve (12) months thereafter or until all services ordered prior to the expiration date have been satisfactorily delivered and accepted or performed satisfactorily for the using department. It is the intent of Harris County to award multiple vendors thereby creating a pool of vendors to provide all or a subset of described services on an as needed basis throughout the contract period.

PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held July 8, 2025 at 10:00am local time, Houston, TX via Microsoft Teams. **Attendance is not mandatory; however, all vendor(s) are encouraged to attend in order to have a better understanding of the requirements of this Request for Proposal (RFP).** Persons with disabilities requiring special accommodations should contact Office of the Purchasing Agent at 713-274-4400 at least two (2) days prior to the conference.

[Join the meeting now](#)

Meeting ID: 257 443 676 588 2

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It is the responsibility of each vendor to examine the entire RFP package, seek clarification in writing, and review their offer for accuracy before submitting. Questions relating to this RFP must be submitted in writing through Bonfire. The deadline for submission of questions relating to this RFP is listed on the Event schedule within Bonfire of this project. All questions submitted in writing prior to the deadline will be compiled and answered in writing. A copy of all questions and answers will be released as a Public Notice within Bonfire to all firms. The County will not be bound by any information conveyed verbally.

RENEWAL OPTIONS

Harris County may consider four (4) one-year renewal options, renewable one (1) year at a time, based upon the same terms, conditions, but pricing will be revised for rates according to the attachment titled CPI-W Based Priced Adjustment Calculations. Renewal is subject to approval by the Harris County Commissioners Court. Once renewal options are exhausted, the contract must be rebid. Harris County reserves the right to rebid at any time as is in its best interest and is not automatically bound to renew.

BACKGROUND

Harris County is the third-largest county in the United States by population, including thirty-four (34) cities with over 4.7 million residents and 18,500 County employees and contractors. Harris County has the second-largest port based on exports and over one hundred twenty-five (125) law enforcement agencies. Harris County has many departments that provide critical services to this large population, including but not limited to Public Safety, Law, Justice, Records, Property and Home, Transportation, Health and Medical, Education, Family and Social Services, and Parks and Recreation. Many of these services require collecting, transferring, and storing sensitive information, including Personally Identifiable Information (PII), Personal Health Information (PHI), financial data, criminal justice data, and other sensitive business data. It is imperative that Harris County be able to protect against the unauthorized disclosure of this sensitive information and that Harris County can ensure the integrity and availability of information and services.

Harris County Universal Services (HCUS) supports the mission of Harris County by developing, implementing, and supporting high-quality, innovative, cost-effective Information Technology (IT) solutions. The HCUS Infrastructure team is responsible for the Harris County enterprise network. The HCUS Cybersecurity team must protect the data contained and transmitted within their information systems, preserving confidentiality, integrity, and availability.

The County has many hosts and systems to monitor and protect, including user endpoints, an on-prem data center, a disaster recovery data center, Internet of Things/ Operational Technology (IoT/OT), Azure resources, a continually growing number of cloud services, and vendors.

All Sub-Project(s) with a budgetary threshold of \$50,000 or more will be subject to the County's MWBE Program and Goal Determination process. Additionally, all Sub-Project software purchases will be subject to the County's IT Infrastructure Planning and Security Governance (I2PSG) committee and the County's IT US Reference Architecture and Questionnaire checklist (USRA). Proposed solutions are subject to a Pass/Fail scoring. For additional information related to this process refer to the Evaluation Section of this solicitation.

The initial focus of the contract(s) resulting from this solicitation shall include but not be limited to the Sub-Project(s) identified below:

A. Sub-Project 1 - Core Initiative: Consulting services related to Enterprise Resource Planning (ERP), Technology Strategies, Justice Applications, and Infrastructure to support critical organizational needs.

Key objectives of Sub-Project 1 include, but is not limited to:

- i. Assist with conducting thorough evaluations of current IT systems, infrastructure, and processes to identify strengths, weaknesses, and areas for improvement.
- ii. Provide expert advice and actionable recommendations to address identified issues and enhance overall IT performance.
- iii. Assist with executing proposed solutions and technology upgrades to ensure successful deployment and integration.
- iv. Create strategic plans that align IT initiatives with the County's long-term goals and objectives.
- v. Assist with overseeing the management of IT resources, projects, and operations to ensure optimal performance and efficiency.
- vi. Assist with cybersecurity measures to protect sensitive data and systems from threats and vulnerabilities.
- vii. Provide professional input regarding streamlining IT processes and workflows to enhance productivity, efficiency, and effectiveness.
- viii. Assist with continuous monitoring and assessing the impact of implemented solutions and strategies to ensure they meet the desired outcomes.
- ix. Assist with the assessment, planning and testing of Continuity of Operations Planning, including disaster recovery planning.
- x. Assist with the assessment, evaluation and/or execution of transitioning business systems from on-premise to the cloud.

- **Sub-Project 1 MWBE Goal Requirement: 13.30%**

B. Sub-Project 2 - ERP Transformation Strategy and Consulting Services

Key objective of Sub-Project 2 includes, but is not limited to:

- i. The development of an Enterprise Resource Planning (ERP) transformation strategy for Harris County. The vendor shall guide Harris County through the process of developing a strategy to modernize, consolidate, or upgrade its Peoplesoft ERP system, encompassing everything from business process analysis to technology implementation and change management.
- ii. The proposed services shall not be limited to the general requirements listed below and each vendor is encouraged to respond with their ability to perform or expand on each activity/deliverable as well as provide additional capabilities not listed.
- iii. Gather current state information and identify key stakeholders.
- iv. Prepare and present initial information to Commissioner's Court regarding approach and timeframe (onsite presentation).
- v. Schedule and conduct workshops with Harris County leadership to capture ERP strategic priorities.
- vi. Define strategic business and technology driver framework, vision and key areas of differentiation.
- vii. Review and document current technology and data landscape.
- viii. Conduct an estimated fifteen (15) business context discovery workshops by process area for Financial Supply Chain Management (FSCM) and Human Capital Management (HCM) modules including, but not

limited to Core Accounting, Grants and Projects, Budgeting, Procurements and Contracts, Strategic Sourcing, Human Resources, Talent Management, and Payroll (onsite or remote workshops).

- ix. Review recommended ERP options with key stakeholders.
- x. Ensure alignment on options and craft high-level roadmap for ERP Transformation.
- xi. Present Options Analysis and Case for Change to Commissioner's Court (onsite presentation).
 - a. If findings indicate it is in the best interest of the County to explore a new ERP solution; vendor may be engaged to assist in the selection and oversight of the deployment of a new ERP solution. Should vendor be engaged in this task vendor must possess the experience and expertise with selecting and implementing ERP solutions to include integrating with existing technology platforms. Additional services may include but not limited to:
 - 1. Assist in the preparation of a comprehensive set of system specifications for inclusion in an RFP. The RFP will be prepared in accordance with Harris County's Purchasing guidelines and requirements to achieve the benefits of selecting a solution in a competitive environment.
 - a. Key Deliverables for this task include but are not limited to:
 - i. Business and technical specifications report.
 - ii. Prepare a suggested vendors list to include contact information.
 - iii. Assist in developing a scoring methodology and actual scoring of ERP solution RFP responses.
 - iv. Assist in the preparation of an agenda for pre-proposal conference.
 - v. Assist with vendor Question & Answer (Q&A) received during pre-proposal and vendor presentation meetings.
 - 2. Participate as a non-voting member of the Evaluation Committee in an Advisory role during the evaluation process of vendor proposals. Vendor shall assist in the analysis of vendor responses, be present for vendor presentations and demonstrations.
 - a. Key Deliverables for this task include but are not limited to:
 - i. Vendor analysis report(s) consisting of a summary of each response highlighting the strengths and weaknesses of each proposal
 - ii. Development of vendor demonstration scripts
 - iii. Assist with the identification of potential risks and issues of any proposed ERP solution
 - iv. Present findings
 - v. Assist with contract negotiations process to include the review of license structure, support and service level agreements.
 - 3. Oversight Services.
 - a. Key Deliverables for this task include but are not limited to:
 - i. Provide project management oversight during the implementation phase of the ERP solution to include data conversion\migration monitoring user acceptance testing, user training and project closeout.
 - ii. Integration
 - iii. Act as a liaison between the steering committee stakeholder team, project team and awarded ERP solution vendor.
 - iv. Work with awarded ERP vendor and project team to develop and manage a comprehensive project plan, detailing project stages, milestones and resources
 - v. Ensure adequate knowledge transfer to County staff to configure, manage, operate and support ERP solution.

- **USRA Requirement:** Tools to be utilized for this Sub-Project shall be subject to the Harris County Universal Services Reference Architecture (USRA) requirements. The USRA is a compact, comprehensive, abstract illustration of the technology components and business processes supporting County operations, see attachment titled Harris County Universal Services Reference Architecture (USRA) located in Bonfire under Requested Information. The USRA has been developed to provide guidance on how solutions shall deploy and operate within an IT environment and serves as a reference for the specific architectures that vendors may implement to solve County business objectives.

The USRA is a compact, comprehensive, abstract illustration of the technology components and business processes supporting County operations, see the attachment titled Harris County Universal Services Reference Architecture (USRA). The USRA has been developed to provide guidance on how solutions shall

deploy and operate within the IT environment. The USRA serves as a reference for the specific architectures that vendors may implement to solve County business objectives.

- **Sub-Project 2 MWBE Goal Requirement: 13.30%**

C. Sub-Project 3 - Consulting Services: Comprehensive Analysis, Assessment, Planning and Enhancement of the Harris County Juvenile Justice Casework System, currently identified as Justice Information Management Systems (JIMS2)

Key Objectives of Sub-Project 3 include but is not limited to:

- i. Assistance to conduct a thorough assessment of Harris County's custom application processes and juvenile casework operations to support an updated system solution. This assessment will focus on the following areas to ensure project success and effective planning and documentation.
 1. The selected vendor shall provide analysis, documentation, and recommendations to guide the future procurement of an appropriate solution. The purchase of a software solution is not within scope of this Sub-Project.
 - a. Key Deliverables for this task include but are not limited to:
 - i. Identify and Analyze Existing Processes:
 1. Complete an application analysis, performing a diagnostic assessment of the County's current JIMS2 system to further understand application portfolio, stakeholder technology concerns, operational risks, and system resiliency
 2. Identify Harris County Juvenile Probation Department (HCJPD) processing needs and analyze current operations.
 3. Access and assess existing application/technology processes.
 4. Provide operational and technological capability recommendations for current system applications
 - b. Stakeholder Engagement and Alignment:
 - i. Identify required stakeholders and create stakeholder awareness.
 - ii. Define a unified vision and create alignment across varying stakeholder groups.
 2. Collaborate with HCJPD and appropriate Justice Departments to detail specifications/requirements that will be used to create an RFP for the procurement of a recommended solution. An RFP will be prepared in accordance with Harris County's Purchasing guidelines and requirements to achieve the benefits of selecting a solution in a competitive environment.
 - a. Key Deliverables for this task include but are not limited to:
 - i. Business and technical specifications report
 - ii. Prepare a suggested vendors list to include contact information
 - iii. Assist in developing a scoring methodology and actual scoring of solution RFP responses
 - iv. Assist in the preparation of an agenda for pre-proposal conference
 - v. Assist with vendor Question & Answer (Q&A) received during pre-proposal and vendor presentation meetings.
 3. Documentation and Planning:
 - a. Create the appropriate business requirements documents outlining the business needs as identified by HCJPD and engaged stakeholders.
 - b. Define a comprehensive project plan.
 - c. Define a new solution implementation plan.
 - d. Market Analysis and Solution Implementation:
 - e. Perform a market analysis to determine possible solutions.
 - f. Provide personnel and resources necessary to project manage the implementation of the recommended solution.
 4. Advisory Services:
 - a. Participate as a non-voting member of the Evaluation Committee in an Advisory role during the evaluation process of vendor proposals. Vendor shall assist in the analysis of vendor responses, be present for vendor presentations and demonstrations.
 1. Key Deliverables for this task include but are not limited to:
 - i. Vendor analysis report(s) consisting of a summary of each response highlighting the strengths and weaknesses of each proposal.
 - ii. Development of vendor demonstration scripts.

- iii. Assist with the identification of potential risks and issues of any proposed solution.
 - iv. Present findings.
 - v. Assist with contract negotiations process to include the review of license structure, support and service level agreements.
- 5. Service Requirements:
 - a. The following service requirements shall be addressed on the vendor's response to this Sub-Project and in the finalized scope of work if awarded.
 - b. Requirement Document – The vendor must provide a comprehensive "AS IS" and "TO BE" analysis as part of their proposal:
 - 1. AS IS Analysis:
 - i. A detailed document outlining the current state of the existing processes, applications, and systems relate to juvenile operations. This analysis should capture the present business needs, rules, workflows, and any identified inefficiencies or gaps in the current system.
 - 2. TO BE Analysis:
 - ii. A forward-looking document that outlines the desired future state of the processes, applications, and systems. The analysis should describe how the proposed solution will address the identified needs and business rules, as well as how it will improve or replace the current state. The "TO BE" document should provide a clear vision of the expected outcomes, including enhancements in efficiency, functionality, and support for juvenile operations.
- 6. Implementation Plan:
 - a. The vendor shall leverage their experience and expertise to propose a roadmap and deployment approach based on the project requirements.
- 7. Oversight Services:
 - a. Provide project management oversight during the implementation phase of the solution to include data conversion\migration monitoring user acceptance testing, user training and project closeout.
 - b. Integration
 - c. Act as a liaison between the steering committee stakeholder team, project team and awarded solution vendor.
 - d. Work with awarded solution vendor and project team to develop and manage a comprehensive project plan, detailing project stages, milestones and resource
 - e. Ensure adequate knowledge transfer to County staff to configure, manage, operate and support ERP solution.

USRA Requirement: Tools to be utilized for this Sub-Project shall be subject to the Harris County Universal Services Reference Architecture (USRA) requirements. The USRA is a compact, comprehensive, abstract illustration of the technology components and business processes supporting County operations, see attachment titled Harris County Universal Services Reference Architecture (USRA) located in Bonfire under Requested Information. The USRA has been developed to provide guidance on how solutions shall deploy and operate within an IT environment and serves as a reference for the specific architectures that vendors may implement to solve County business objectives.

The USRA is a compact, comprehensive, abstract illustration of the technology components and business processes supporting County operations, see the attachment titled Harris County Universal Services Reference Architecture (USRA). The USRA has been developed to provide guidance on how solutions shall deploy and operate within the IT environment. The USRA serves as a reference for the specific architectures that vendors may implement to solve County business objectives.

- **Sub-Project 3 MWBE Goal Requirement: 13.30%**

SPECIFICATIONS

Harris County is seeking qualified vendors to provide a comprehensive suite of technology consulting services. The County intends to award multiple vendors, creating a pool to deliver technology consulting services encompassing assessments, recommendations, implementations, strategy, management, security, process and performance improvements, evaluations, technical assistance services, dashboards, and applicable tools on an as-needed basis

throughout the contract period. Harris County makes no guarantees in regard to contract usage, any particular profit, revenue, or volume of work to the vendor(s).

Although the full suite of services may not be initially scoped within a particular project, Harris County reserves the right to procure any service within the aforementioned full suite of services offered by the vendor should the recommendations and best practices prove it is in Harris County's best interest to do so. Any services not initially scoped shall be jointly agreed upon with the execution of an Amendment to the Agreement resulting from this RFP.

Vendor(s) shall furnish all qualified personnel, supervision, services, materials, equipment, facilities, travel, overhead and incidentals necessary to provide the proposed services. Please note all travel shall be in compliance with the attachment titled Harris County Travel, Training, and Business Meeting Policy.

Information regarding proposed methodology, approach, and deliverables, shall be included in Section II of vendor's response.

1. General Requirements

The proposed services shall not be limited to the general requirements listed below and each vendor is encouraged to respond with their ability to perform or expand on each activity/deliverable as well as provide additional capabilities not listed.

- 1.1. Vendor(s) shall demonstrate their capability of providing at least two (2) or more of the service categories, outline in Section 2.3.
- 1.2. Harris County may require the vendor provide services on-site from a local Harris County owned office, so vendor shall have adequate resources in the Houston area in order to eliminate or minimize travel expenses. Travel may be authorized for certain engagements if approved in advance by an authorized HCUS representative. The vendor shall also indicate the number of national resources available, if any. Any expenses including, but not limited to, travel, lodging, meals, etc. must conform to Harris County Travel, Training, and Business Meeting Policy.
- 1.3. Harris County may authorize remote work; however, these decisions will be made on a per project basis and will be at the discretion of HCUS.
- 1.4. When requested by Harris County, vendor(s) shall provide a Statement of Work (SOW) to include: a detailed plan for completing the necessary services, roles and responsibilities of the parties to complete the services. The SOW shall also, at a minimum, state the mutually agreed upon cost based on the hourly rates established through this RFP and date by which all services must be completed by the vendor.
- 1.5. With respect to software computer programs and/or source code developed for Harris County, the work will be considered "work-for-hire", and Harris County, not the vendor or vendor's employees/subcontractors, will have full and complete ownership of all software computer programs and/or source codes developed.
- 1.6. Vendors shall be compliant with appropriate federal, state and county regulations.
- 1.7. Vendor warrants it shall provide qualified personnel who shall perform in a professional manner. "Professional manner" means the personnel performing shall possess the skill, license(s) and competencies consistent with the prevailing business standards within the State of Texas. Vendor shall verify prospective staff identity and qualifications prior to submitting for Harris County consideration. Vendor's failure to conduct due diligence on its proposed personnel may be cause for termination of contract.
- 1.8. At no time shall vendor permit or allow vendor personnel or subcontractors to have present at any Harris County worksite alcohol, controlled substances, or firearms. Smoking is not permitted in any area of any facility which is enclosed or in the finish-out stage of construction.
- 1.9. Any person employed by vendor or any subcontractor who, in the reasonable opinion of a Harris County Project Manager, does not perform in a professional or skillful manner, or is disrespectful, intemperate, disorderly or otherwise objectionable, shall, at the written request of Harris County, be removed from the jobsite by the vendor or any subcontractor employing such person. Any such person who is removed shall not be assigned again to any Harris County facility without the prior written consent of Harris County.
 - 1.9.1. Vendor's failure to remove such person(s), Harris County may withhold all monies which are, or may become, due that are allocable to the portion of the services on which such person(s) is working or may suspend that portion of the services. Upon suspension, vendor shall provide an acceptable substitute. Such person shall perform the services in the manner prescribed herein at no additional cost to Harris County.

2. **Consultant Classification/Service Categories**

Consulting services are categorized under multiple distinct service areas, each addressing key organizational and technical needs. Vendors shall demonstrate the capability to provide services in at least two (2) or more of these service categories as part of the response.

This approach ensures that vendors possess the necessary breadth of expertise to deliver comprehensive support and contribute meaningfully to the project's success. By engaging across multiple categories, vendors will play a crucial role in addressing the County's diverse requirements effectively.

2.1. **Consultant Questionnaire and Service Category Questionnaires**

Vendor shall complete **Consultant Questionnaire Q-08AV** as part of their proposal submission. A "complete" response is defined as providing answers to all questions. A response is still required for questions deemed non-applicable. Additionally, vendors shall complete Service Category Questionnaires that align with their available resources and expertise.

These questionnaires serve as a critical tool for the County with evaluating the scope, capabilities, and deployment features of the proposed solutions. Incomplete responses to any category within the questionnaires may result in disqualification from consideration for that category. Contracts will be awarded based on specific service categories.

2.2. **Consultant Classifications**

Below is an overview of standard IT job roles:

2.2.1. **Principal Consultant/Partner/Director**

- 2.2.1.1. Strategic leadership and vision for IT projects.
- 2.2.1.2. Overseeing client relationships and ensuring alignment with business goals.
- 2.2.1.3. Driving innovation and high-level decision-making.

2.2.2. **Senior Manager**

- 2.2.2.1. Managing multiple IT projects and teams.
- 2.2.2.2. Developing and implementing IT strategies.
- 2.2.2.3. Ensuring project delivery within scope, budget, and timeline.

2.2.3. **Manager**

- 2.2.3.1. Supervising IT project execution and team performance.
- 2.2.3.2. Coordinating between stakeholders and technical teams.
- 2.2.3.3. Monitoring progress and resolving project challenges.

2.2.4. **Senior Consultant**

- 2.2.4.1. Providing expert advice on IT systems and solutions.
- 2.2.4.2. Designing and optimizing IT infrastructure and processes.
- 2.2.4.3. Leading specific project components or workstreams.

2.2.5. **Consultant**

- 2.2.5.1. Conducting technical assessments and implementing IT solutions.
- 2.2.5.2. Supporting system integration, testing, and deployment.
- 2.2.5.3. Delivering training and documentation for end-users.

2.2.6. **Other Vendor-Defined Consultants**

- 2.2.6.1. Roles tailored to specific expertise addressing niche technical needs or emerging technologies.

2.3. **Consulting Services Categories**

The service categories listed below are not intended to be a comprehensive list, instead, its intent is to provide additional insight into the nature of the desired services to be provided on a per project basis.

Tasks associated with service categories shall include but not be limited to:

- Gathering, assessing, and validating information and data from various sources, such as department databases, research studies, or government codes.
- Preparing comprehensive written reports, presentations, maps, and charts.
- Ensuring the integrity of the information collected and quality control measures are in place.

2.3.1. **Service Categories**

- 2.3.1.1. **Advisory and Research Services:** Expert guidance and in-depth analysis to support business decisions and strategies.
- 2.3.1.2. **Application and Software Development:** Creation and maintenance of custom software applications to meet specific business needs.
- 2.3.1.3. **Artificial Intelligence (AI):** Development and implementation of intelligent systems and applications to enhance operational efficiency, improve decision-making, and drive innovation through AI capabilities.
- 2.3.1.4. **Business Intelligence:** Tools and strategies to transform raw data into meaningful insights for better decision-making.
- 2.3.1.5. **Cybersecurity:** Measures and technologies to protect systems, networks, and data from cyber threats.
- 2.3.1.6. **Data Management:** Practices and technologies for collecting, storing, and using data securely, efficiently, and cost-effectively.
- 2.3.1.7. **Enterprise Resource Planning (ERP):** Understanding business processes and organizational needs, configuring and integrating various modules and providing training and support to ensure effective usage. Harris County's current ERP system is Oracle Peoplesoft.
- 2.3.1.8. **Information Security:** Policies and practices to safeguard sensitive information from unauthorized access and breaches.
- 2.3.1.9. **Infrastructure:** Design, implementation, and maintenance of physical and technical infrastructure.
- 2.3.1.10. **Justice Applications:** Specialized software solutions for the justice sector, including case management (adult and juvenile), prosecution, public defender, computer aided dispatch, and other related criminal justice information systems.
- 2.3.1.11. **Microsoft Environment:** Deployment and management of Microsoft desktop, server and enterprise applications to ensure a reliable and secure IT infrastructure on premise and in the cloud.
- 2.3.1.12. **Network:** Network assessment, design, and implementation services to support organizational connectivity and communication.
- 2.3.1.13. **Process and Service Delivery Improvement:** Techniques and methodologies to enhance efficiency and effectiveness in business processes and service delivery.
- 2.3.1.14. **Technology Strategy:** Planning and implementing technology initiatives that align with business goals and drive innovation.
- 2.3.1.15. **Training and Certification Courses:** Programs designed to enhance skills and validate expertise through structured learning and assessments.

3. **Service Order Plan**

Projects stemming from this solicitation are deemed Sub-Project(s) and will be subject to a secondary phase resulting in a Sub-Award. Sub-Projects will vary on a per project basis and will be ordered on an as needed basis via a Service Order resulting from an Invite Only Request for quote (RFq) released by the Office of the Harris County Purchasing Agent at the sole discretion of Harris County. Sub-Award will consist of a mutually agreed upon SOW.

All Sub-Project(s) with a budgetary threshold of \$50,000 or more will be subject to the County's MWBE Program and Goal Determination process. Additionally, all Sub-Project software purchases will be subject to the County's IT Infrastructure Planning and Security Governance (I2PSG) committee and the County's IT US Reference Architecture and Questionnaire checklist (USRA). Proposed solutions are subject to a Pass/Fail scoring. For additional information related to this process refer to the Evaluation Section of this solicitation.

3.1. **Service Order Plan - SOW**

Each SOW shall provide a detailed project specific plan for completing all necessary tasks of the specific project. SOWs resulting from this RFP shall include, but are not limited to, the following:

- 3.1.1. Project Overview: A brief description of the project, including its purpose and objectives.
- 3.1.2. Scope: Detailed tasks and activities, including any assumptions or exclusions.
- 3.1.3. Timeline: A schedule with milestones and deadlines for each task/phase. Vendor shall maintain sub-project schedule to ensure project is completed on time, on budget and that the

proposed project SOW is aligned precisely to meet project goals and objectives. Proposed Sub-Project schedule shall be detailed, realistic and flexible enough to accommodate unforeseen events. Schedule shall contain minimum milestone dates that shall serve as a guideline only. Vendor shall include descriptive narratives detailing how vendor proposes to achieve and adhere to this schedule. The initial schedule shall be the baseline; an agreed upon Project Schedule to include implementation timeline and all subsequent schedules and updates including Go-Live date(s) shall be agreed upon during Sub-Award phase. Scheduling software acceptable to Harris County shall be utilized to identify all milestones and events beginning from Notice to Proceed (NTP) of a project. Vendor shall update the schedule and provide to Harris County in accordance with agreed upon cadence.

- 3.1.4. Deliverables: Specific outcomes or products that will be provided, along with acceptance criteria.
- 3.1.5. Resources: Information about the resources (e.g., personnel, tools, technology) required for the project. Clearly differentiate if subcontractor will provide services and the percentage of SOW to be delivered by said subcontractor. Tools to be utilized for this Sub-Project shall be subject to the Harris County Universal Services Reference Architecture (USRA) requirements.
- 3.1.6. Roles and Responsibilities: Clear delineation of roles and responsibilities for both the vendor and Harris County.
- 3.1.7. Cost: Details about the project's budget and payment schedule.
- 3.1.8. Service-Level Agreements (SLAs): Details about expected level of service/support to be provided by vendor.
- 3.1.9. Acceptance Criteria: Criteria for how the deliverables will be evaluated and accepted by Harris County.
- 3.1.10. Communication Plan: Frequency and methods of communication, status reports and meetings.
- 3.1.11. Risk Management: Identification of potential risks and strategies for mitigation.
- 3.1.12. Change Management: Procedures for handling changes to the project scope or deliverables.
- 3.1.13. Issue Management: Process for documenting and resolving problems that arise. Include vendor escalation contact information including names, email addresses and telephone numbers from project level through executive levels.
- 3.1.14. Meetings and Reports – Conduct meetings with Harris County personnel to discuss Project Schedule, procedural updates, or other issues affecting the services performed under the contract in accordance with mutually agreed upon cadence. All meetings shall be documented and made available to Harris County. Meetings shall be held with a vendor representative with the ability to address contractual issues that may develop.

Minimum of five (5) business day(s) prior to scheduled meetings, vendor shall submit the meeting agenda to Harris County for review. Harris County may submit revisions to the agenda to include reprioritized items, concerns, etc. not previously included within the agenda. Vendor shall record and distribute written meeting minutes for Harris County approval. Minutes shall be available within two (2) business days of the meeting. Ad hoc meetings may be required on occasion. Both vendor and Harris County will make every effort to accommodate ad hoc meeting requests. Additionally, vendor may be required to provide formal presentation(s) to key County stakeholders upon request to discuss content and/or deliverables resulting from this RFP. Furthermore, vendor shall provide periodic progress report(s) covering activities, addressing problems and providing resolution recommendations. Report(s) shall be allied to the work plan developed by the vendor for project(s), as amended or approved by Harris County.

The above list of tasks defined within this section is not intended to be a comprehensive list, instead, its intent is to provide additional insight into the nature of the desired services.

Sub-Project(s) will vary in regard to on-site vs. remotely. An individual and mutually agreed upon SOW document shall indicate the desired method of delivery. Specific resource level of experience, certifications if applicable and qualifications shall be established for each Sub-Project. At a minimum, industry standards shall apply for all Sub-Projects. Harris County anticipates Time and Materials (T&M) for some services while fixed price for others. Vendor

shall define and provide T&M pricing and fixed price where applicable with a total “not-to-exceed” project price within the pricing section of all SOWs. Total not-to-exceed fees shall be all-inclusive, no additional fees including but not limited to travel, per diem and or transportation shall be billed separately. A detailed pricing structure shall be included within the SOW indicating all tasks and milestones that are T&M and those that are fixed price. T&M tasks must identify estimated number of hours anticipated to complete task(s). **Additional vendor terms and conditions will be null and void and shall not be included within any resulting Sub-Projects.**

Vendor shall provide resumes for all Key Personnel with all Sub-Project submittals for Harris County’s review and approval including all management and executive-level staff to be assigned to the contract resulting from this RFP with staffing levels competency. Key Personnel is defined as all Subject Matter Experts (SME)s to be utilized in functional and technical areas of the project. Resumes of Key Personnel shall include relevant knowledge, skill, and experience. Changes to Key Personnel, anticipated or unforeseen, shall be immediately communicated to Harris County.

Key Personnel shall be fully dedicated to the Project as necessary during the appropriate Project phases for those resources to perform their assigned or specified Project duties. Vendor(s) shall not arbitrarily reassign

Key Personnel to other projects, or terminate Key Personnel (except for cause), without providing Harris County with appropriate notification.

Vendor may not replace any management or executive-level staff nor Key Personnel (except for cause) without the prior written consent of Harris County. In the event of an anticipated or unforeseen change to Key Personnel; vendor shall notify Harris County immediately for its consideration and approval of replacement of Key Personnel, which shall not be unreasonably withheld or delayed. All key personnel shall be identified with percentage of time to be dedicated to this project. If personnel must be shared with other projects, vendor shall indicate to Harris County the percentage of time that Key Personnel will be devoted to other projects. If any subcontractor will be utilized to provide any portion of services, vendor shall clearly indicate the qualifications of each subcontractor and describe each subcontractor’s role, duties and percentage of work to be performed as well as previous experience working together.

At no time shall vendor permit or allow vendor personnel or subcontractors to have present at any Harris County worksite alcohol, controlled substances, or firearms. Smoking is not permitted in any area of any facility which is enclosed or in the finish-out stage of construction.

Any person employed by vendor or any subcontractor who, in the reasonable opinion of a Harris County Project Manager, does not perform in a professional or skillful manner, or is disrespectful, intemperate, disorderly or otherwise objectionable, shall, at the written request of Harris County, be removed from the jobsite by the vendor or any subcontractor employing such person. Any such person who is removed shall not be assigned again to any Harris County facility without the prior written consent of Harris County.

Should vendor fail to remove such person(s), Harris County may withhold all monies which are, or may become, due that are allocable to the portion of the services on which such person(s) is working, or may suspend that portion of the services. Upon suspension, vendor shall provide an acceptable substitute. Such person shall perform the services in the manner prescribed herein at no additional cost to Harris County.

3.2. **Sample – Statement of Work (SOW)**

The vendor shall provide a sample SOW for one (1) of the Service Categories listed in Section 2.3.1. that demonstrates their capability to deliver a successful project.

4. **Travel**

The County operates under guidelines to ensure efficient service provisions and cost-effectiveness. Therefore, travel reimbursements, including tolls and parking, are not provided for the vendor’s employees

for the vendor's whose offices or administrations are not located within Harris County.

While Harris County encourages and supports local businesses, we recognize that, due to the nature of these services, local resources may not be always available. Where applicable, vendor(s) shall have adequate resources in the Houston area in order to eliminate or minimize travel expenses. Travel may be authorized for certain engagements if approved in advance by an authorized representative of a Harris County Department. Any expenses including, but not limited to, travel, lodging, meals, etc. must conform to the attachment titled Harris County Travel Policy located in Bonfire under Supporting Documentation.

5. Miscellaneous Requirements

All vendors who provide services under this solicitation shall be and remain employees of the vendor. It is understood and agreed that the vendor is solely responsible for all services being provided and shall provide adequate insurance to cover against all losses incurred by the vendor's employee and/or equipment during the course of the contract. It is further understood and agreed that the fees paid by Harris County under this contract cover all services to be provided pursuant to the RFP award, including workers compensation and insurance coverage required under the contract. The vendor shall also be responsible for loss, abuse and misuse of Harris County equipment/property.

5.1. Alcohol And Drug Screening/Immunization

Vendor agrees that alcohol and drug testing will be conducted at a U.S. laboratory certified by the Department of Health and Human Services under the National Certification Program to perform Department of Transportation drug and alcohol screening ("Certified Laboratory") as requested. Please refer to the attachment titled Alcohol and Drug Screening/Immunization - Comprehensive List of Unacceptable Levels.

5.2. Work Hours

All vendors awarded under this contract shall conform to Harris County hours, shifts and possible locations. Occasionally, it may be necessary to reschedule work hours or workdays within the department. Vendors may be asked to report early or stay late when required by Harris County.

5.3. Time Calculation

Harris County calculates vendor's hours to the nearest completed one-tenth (1/10) hour of any given hour. Invoices submitted for payment **MUST** be calculated in this format or they will be rejected and not paid. No vendor will be permitted to work additional hours to make-up time lost during a given day or week without the approval of the using departments personnel section. No make-up time will be approved which would constitute more than forty (40) hours in a given week. Harris County **will not** be responsible for payment for vacation, sick time or any other hours not actually worked by the contractor.

5.4. Overtime/Weekend/Holidays

Harris County does **NOT** pay overtime, shift differentials or different rates for holidays and weekends. In an emergency or with the using department's approval to work hours exceeding a forty (40) hour work week, Harris County will pay the standard bill rate associated with that position. Contractors must obtain written permission from the department director prior to working additional hours exceeding a forty (40) hour work week. Proof of the written permission authorizing contractor to work additional hours must be submitted with the invoice for verification.

Under no circumstances shall vendor bill for time worked on holidays recognized by Harris County unless written approval is received by department director supervising the project. Harris County Holidays are as follows: New Year's Day, Martin Luther King, Jr. Day, Good Friday, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving Day, Christmas Eve and Christmas Day.

5.5. Payroll Withholdings

Federal withholding, FICA, fees and all money matters handled between the vendor and its employees are not the responsibility of Harris County. Harris County is not responsible in any way for handling

these matters beyond the terms of this contract and contractual obligation to pay the vendor.

5.6. Increase/Decrease in Bill Rates

For any year in which a current contract is renewed, the renewal year pricing will be determined by adjusting the current contract year pricing by the average inflationary/deflationary effect, as reported in the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for Houston, Texas, between the current contract year as compared to the year preceding the current contract year of the contract. The CPI-W, as published by the U.S. Bureau of Labor Statistics (BLS), is a measure, over time, of the average change in the compensation of urban wage earners and clerical workers. Refer to the attachment titled CPI-W Based Price Adjustment Calculations for additional information.

5.7. Dispute Resolution

Vendor and Harris County will attempt in good faith to resolve any dispute by the following dispute resolution process:

5.8. Service Offerings - Good faith efforts will be made by the County and vendor's designated representatives to resolve issues that arise in a prompt and equitable manner. If the aforementioned representatives fail to reach an equitable resolution to the issue, either party may notify Purchasing in writing of the dispute and request that a meeting be held between vendor's senior representatives and Purchasing. Parties shall endeavor to meet a mutually agreed time and place within ten (10) calendar days of such written notice and attempt in good faith to mediate a resolution of the issue.

5.9. Billing – Harris County may dispute, and vendor shall accept and process the Harris County disputes. Vendor shall resolve all billing disputes within ninety (90) days of the dispute notice. Harris County reserves the right not to make payment for disputes that have not been resolved within ninety (90) days.

5.10. Billing disputes begin with the initial submission of the dispute by Harris County and end with the mutually agreeable resolution of the dispute. Applicable payment adjustments will be applied on the next available bill cycle. Harris County may reject a bill in whole or in part. Once a dispute is resolved, vendor shall process the associated adjustment ensuring that the debit or credit and the associated billing dispute identifier are clearly documented. Upon resolution, vendor shall apply any credits due within two (2) billing cycles of resolution.

5.11. In cases where a complete resolution is not forthcoming, vendor shall submit partial resolutions to Harris County for acceptance or rejection. Accordingly, Harris County will respond within sixty (60) days to vendor's proposed resolution. Either party may escalate the dispute at any time to Purchasing. In cases where vendor and Harris County agree on a portion of a dispute, the parties may make an adjustment to resolve the agreed-to portion(s) pending resolution of the remainder of the dispute.

5.12. Disputes that are not resolved within one-hundred eighty (180) days of the dispute notice or the approved extension time shall be escalated to the Purchasing.

5.13. Vendor shall provide a monthly Dispute Report no later than the first business day of each month. Monthly Dispute Report shall identify the type of dispute i.e. service, billing, SLA etc. dispute status, proposed resolution and resolve date.

6. Service Level Agreement:

Vendor shall describe each SLA associated with its proposed service. Vendor shall disclose its methodology for measuring each of its SLAs, including but not limited to the formulas for calculating these measurements. Vendor shall disclose how vendor shall address failures to perform to SLA levels and any billing adjustments, credits or other compensation offered.

Vendor shall describe each SLA associated with its proposed service. At a minimum, vendor's SLA shall:

- 6.1. Describe each SLA associated with applicable service offerings.
- 6.2. Address how vendor intends to deliver and maintain service offerings.
- 6.3. Define and measure Key Performance Indicators (KPIs).
- 6.4. Outline vendor and Harris County responsibilities.
- 6.5. Include points of contact and escalation process with timelines.
- 6.6. Disclose its methodology for measuring each of its SLAs, including but not limited to the formulas for calculating those measurements.

7. SLA Monitoring and Reporting

Vendor shall ensure the provisioning of all the required means to measure and report on the service levels for the services.

- 7.1. Harris County will use the necessary measurement and monitoring tools and procedures to measure and report the performance of the vendor against the applicable service levels. Such measurement and monitoring enable reporting at a level of detail sufficient to verify compliance with service levels and is subject to review by Harris County. The vendor shall provide Harris County with information about such tools and procedures for verification, project, and contract management purposes.
- 7.2. Vendor shall provide Harris County with a monthly delivery of reports, data and/or dashboards during the term of this contract, highlighting:
 - 7.2.1. Performance against deliverables and Service Levels,
 - 7.2.2. Identified issues and associated resolution approach and status,
 - 7.2.3. Identified improvement areas, suggested improvement actions, and status for each.

8. Guaranty of Work:

Vendor must provide warranty information. Detail all components associated with providing this assessment including but not limited to the following:

- 8.1. Describe the terms and conditions of warranty on workmanship and professional services.

9. Non-Performance By Vendor

Vendor may be placed on probation, or the contract may be suspended or terminated by Harris County. Circumstances resulting in probation, suspension or termination may include, but are not limited to, any or all of the following offenses:

- 9.1. Failure to meet and maintain minimum quality or performance standards.
- 9.2. Failure to cure any deficiencies found as a result of tests or performance of services.
- 9.3. Failure to follow Harris County procedures when accepting/filling work requests.
- 9.4. Failure to maintain required insurance coverage.
- 9.5. Failure to provide accurate and timely invoices in the Harris County approved format.
- 9.6. Actions exposing Harris County, Harris County employees or other persons unnecessarily to a risk of harm.
- 9.7. Engaging in unprofessional conduct, or whose behavior fails to conform to the minimum standards of acceptable behavior for their area/profession will be cause for immediate contract termination.

Probation shall be for a three (3) to six (6) month period based on offense. The County may deem it appropriate to change the probation period to more or less time. Failure to satisfactorily cure any deficiency within that time may result in suspension of services or termination of contract. Under conditions of suspension/termination, the vendor shall not be entitled to damages or compensation beyond payment for goods and/or services already rendered through the end of the probation period and the County shall not be liable for any penalties, attorneys' fees, costs, consequential or liquidated damages as a result of this action.

10. Optional/Value-Added Services

Vendor may propose optional or value-added products and/or services related to the scope of goods and/or services described in the specifications and/or listed on the Pricing/Delivery Information sheet(s) of this RFP by identifying other items and/or brands not identified by Harris County in this RFP. At a minimum, discuss product/service capabilities and reasons why it would be valuable for this project.