

CITY OF FORT LAUDERDALE

RPI Consultants Response to RFP#380

Infor CloudSuite Managed Services



Prepared For

**CITY OF FORT
LAUDERDALE**

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Submitted To

City of Fort Lauderdale

[Event 380-0 Summary / Supplier
Portal](#)

This agreement is valid for 180 days after: Due Date of November 21, 2024 | 2:00ET

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Cover Letter



RPI Consultants, LLC
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Baltimore, MD 21224
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www.rpic.com

Dear Ms. Platkin and City of Fort Lauderdale Evaluation Committee,

RPI Consultants is pleased to present our response to the Infor CloudSuite Managed Services RFP. Having carefully reviewed your bid specifications (including all Addenda) and the goals you have for this project, we know that RPI is ideally qualified to provide a services solution that will not only meet your requirements, but exceed your expectations, and present your organization unmatched value, service, and results.

Having decided to embark on Managed Services and Absence Management projects for your Infor Software, the City needs a partner who will provide end-to-end leadership for these important objectives.

For 25 years, RPI's team of 120+ technical and functional Infor experts have delivered successfully within public sector, and healthcare markets to our more than 500 Customers during that time. Our solutions and dedicated support offers customer success, as well as exceptional thought leadership to the larger Infor community. RPI Consultants is a full-service system integrator centered on the implementation, automation, upgrade and optimization of the Infor CloudSuite solution. Headquartered in Baltimore (MD) with locations in Kansas City (MO), Tampa (FL), and Buffalo (NY), as well as remote staff throughout the United States. Our mission as a company and our dedicated pursuit as the individual experts who make up our company, is to empower you to leverage exceptional software functionality, industry best practices, and matchless training, education and knowledge sharing to overcome the business challenges you face and better deliver on your promises to your customers and communities in a way our peers cannot.

In summary, we are excited to work with you on the journey that lies ahead! Our proposed solution will meet your needs and be a platform for future growth and value. Your POC for this effort is Evan Winebarger ewinebarger@rpic.com | 770-853-7796. We look forward to discussing this strategic initiative with you further and hope that this relationship with your organization extends for many more years to come!

Sincerely,

A handwritten signature in blue ink, appearing to read "R. Stout".

Richard Leigh Stout, Partner

RStout@rpic.com

410-862-0262

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Executive Summary

RPI Consultants Overview

Established in 1999, RPI Consultants (www.rpic.com) brings over 25 years of successful implementation experience in the Infor ERP market to your project. During this time, RPI's team of 120+ technical and functional Infor experts have successfully implemented Infor solutions within public sector and healthcare markets to our more than 500 Customers. Our solutions and dedicated support offers customer success, as well as exceptional thought leadership to the larger Infor community. At RPI, our customers are the life's blood of what we do, and their success is ours. We can proudly say that within our vast customer base, we have not missed a single payroll process, have worked within extremely complex union structures, managed our customers multiple levels of overtime rules, and developed the well-earned reputation for being the strongest Infor Implementation Partner within the industry. RPI has been working on Infor CloudSuite implementations, management, and migrations since 2018, with an extensive successful track record across public sector and other service industries as shown in figure 1 below – a sampling of our customers.



Figure 1 -Sampling of RPI's Infor CloudSuite Clients

In addition to our decades of success implementing the Infor CloudSuite solution, our leadership (<https://www.rpic.com/about/>) and project team brings all the essential skills and services for a seamless experience, including project management, change management, Infor's Implementation Accelerators toolkit, prebuilt leading-practice workstreams, and RPI's expertise in transforming businesses from disparate legacy systems to modern cloud-based technology platforms.

RPI is headquartered in Baltimore (MD) with locations in Kansas City (MO), Tampa (FL), and Buffalo (NY), as well as remote staff throughout the United States. Our mission as a company and our dedicated pursuit as the individual experts who make up our company, is to empower you to leverage powerful software functionality, industry best practices, and matchless training, education and knowledge sharing to overcome the business challenges you face and better deliver on your promises to your customers and communities in a way our peers cannot.

Deep Understanding and Proven Track Record

As an Infor Alliance Partner, RPI Consultants specializes in only Infor ERP solutions. Our experience spans dozens of successful Infor Software Upgrades, Full-Suite Implementations and Managed Services engagements across public sector and healthcare industries. This depth of expertise allows us to anticipate and proactively address the common challenges faced in organizations like yours, ensuring an efficient and transparent project.

Professional Services & Capabilities

SOFTWARE CONSULTING + TECHNICAL ARCHITECTURE + PROJECT MANAGEMENT



New Installs & Implementations

Procure software licenses, install new products and modules, and lead enterprise scale design & implementation projects.



Systems & Process Assessments

Evaluate current business processes and system architecture to identify any gaps, issues, and opportunities for improvement.



New Solution Design & Optimizations

Increase the efficiency and scope of current systems and solutions to improve overall value and Return-on-Investment.



Custom Development & Integrations

Programming, coding, and development services for custom integrations, functions, and apps enterprise platforms.



Managed Services & Remote Administration

Outsourced support for end-users and remote administration of systems and software solutions.



Staff Augmentation & Specialty Services

Fill gaps in your technical or functional teams, including Project Management, Change Management, Training, and Support.

Figure 2 - RPI Project Offerings - a Sampling of How We Support Our Customers

Experience & Qualifications

RPI's Differentiators

The RPI Difference: At RPI we understand the complex challenges that often accompany implementing ERP systems. We also recognize that changes in systems impact critical City processes that cannot afford any level of disruption, and that every software and process change must be flawlessly designed, thoroughly tested, and communicated to each affected staff member in a timely, efficient, and sensitive manner.

RPI's service approach focuses on leveraging Infor CloudSuite to improve and automate business processes. Rather than delivering a "cookie-cutter" approach to implementation and optimization initiatives, we will provide a baseline design and work with your team in an iterative manner to create the optimal software configuration for City. We review each process and recommend best practices based on our 25+ years of experience with Infor Lawson and CloudSuite.

While considering RPI, we would like to bring to your attention the following:

- + **The Independence of an Alliance Partner:** As a systems integrator separate from the software vendor, we leverage our long-term relationship as a strategic Infor partner, to advocate on the City's behalf. We have deep relationships with Infor not only at the leadership level but throughout the sales, delivery, and development portions of the organization. As your advocate and a partner with Infor, we can balance system feasibility and capability with your best interests.
- + **Flat Management Structure:** Our customers are never more than a phone call or email away from our managing partners. That means questions are answered quickly, concerns and issues are resolved timely, and ultimately our projects stay on track.
- + **Quality of RPI Resources:** RPI resources are widely recognized throughout the Infor CloudSuite and greater ERP industry for the depth of their expertise and thought leadership. They are all frequent presenters at Infor user groups and conferences and share their expertise and insights through RPI webinars, podcasts, and e-books. We are proud to share that our consultants and have the most Infor certifications of any Infor partner.
- + **No Outsourcing:** We do not outsource work offshore. We design, manage, and complete the work with our own full-time resources, all of whom are based in North America.
- + **Our Track Record.** RPI has a proven history of successfully completing large, complex projects where others have fallen short or deemed goals unattainable. Each reference we have provided represents a long-term, sophisticated Infor customer who chose and stayed with RPI for good reason. While we're not perfect, we take accountability and make things right when mistakes occur. When you contact our references, you'll hear comments like, "they really understood us," "the best consultants we've worked with," and "they helped us navigate Infor's expansive feature functionality." Our goal is for the City to become one of these references, and we will spare no effort to achieve that.

Our Commitment to Customer Excellence: RPI & Infor bring extensive experience working together to bring success to our Customers and have partnered with cities, healthcare organizations, school districts, county and state governments, utilities and transportation agencies for their Infor implementations and ongoing support services. We deeply understand the unique challenges and nuances faced by organizations entrusted with serving their communities while responsibly managing organizational funds. Our commitment to you extends beyond the successful delivery of ERP services. We are dedicated to helping you achieve your continued mission

of providing quality services to your community by enabling efficient, transparent, and accountable operations. We recognize that every dollar invested in software and consulting services must be carefully considered and justified to stakeholders, and we have taken our partnership with Infor very seriously to achieve the best possible outcomes for our customers.

Engagement Team Information

Services Focused Team

RPI does NOT use offshore resources for any of our projects. We use only RPI employees and vetted, long-term business partners.

RPI is committed to the success of our customers. Our team-based approach capitalizes on our broad range of experiences and assigns the right resources at the right time. This method delivers results on time and under budget in an increasingly complex Infor enterprise. Our people are noted for their depth of product knowledge, communication skills, experience, and above all else, their collaborative nature with our customers and the Infor team.

RPI will work alongside the City leadership during Project Initiation to adequately communicate resource levelling and expectations throughout the life of the project. Any gaps or risks will be identified early and mitigated with additional resources or scope amendments. Within our proposal we have outlined sample RPI resources. We work hard to identify the team members that we know will be the best fit for each project, and they are evaluated as the project lifecycle progresses. If there are issues with a particular resource, we work to mitigate the issue as soon as possible, and work directly with the City project team to fill the gap with a resource that fits both the project requirements and the culture of the team and the City.

RPI Consultants Responsibilities by Role

Role	Responsibility
Engagement Manager The Engagement Manager is responsible for project delivery quality assurance and escalation.	+ Resource management + Services quality assurance + Issue escalation resolution + Quarterly Reviews
Service Delivery Manager The Service Delivery Manager is the primary point of contact and responsible for all major project documentation.	+ Status reports and meeting agendas + Other Deliverables + Issue Escalation
Technical and Functional Consultants RPI's Lead Technical Consultants are Infor product and solution experts.	+ Technical and Functional service requests + Product and technical issue escalation + System training and education

Role	Responsibility
Business & Technical Analysts Analysts are responsible for documentation, quality assurance testing, and core product configuration.	<ul style="list-style-type: none"> + Support consulting and service delivery management activities, as needed + Develop first drafts of deliverables + Perform system and QA testing activities

Note that our team members will be onsite when necessary, and working remotely to maintain budgeting parameters when it makes sense. We will work with the City to determine the onsite vs. offsite work split during project scoping and discovery, and our Project Manager will work with you during the effort to update this as needed during the project lifecycle.

The resources we have provided on the following pages are examples of the types of RPI team members the City will engage with for this project. All of the RPI actual resources assigned to this project will be Infor certified based on their particular area of expertise, and will be assigned based on contract start date.



Amy Newman

RPI Consultants, Program Manager, PMP

Overview

Product Expertise

- + GHR Implementation
- + V10 Implementation (Finance, Supply Chain, HR, & Payroll)
- + MSCM
- + Kronos Integration

Amy Newman is a Program Manager at RPI with nearly three decades of experience in supply chain management and holds PMP Credentials from the Project Management Institute. She began her PM career at a large health system in 1989 and has always been focused on customer service and high-quality deliverables. While serving in the role of Corporate Supply Chain Director, Amy was responsible for developing, managing, and controlling relationships between the IDN and its customers. She was also directly responsible for system procurement, corporate negotiations, and distribution. Although her expertise lies in supply chain management, she also has a background in re-engineering.

Amy understands cost savings and enjoys identifying operational efficiencies that may impact a project's budget. She holds a B.S. in Business Administration and an MBA in Healthcare Business. In addition to being a Certified Maintenance & Reliability Professional, she also completed the Wharton School Executive Certification Program, as well as Belmont University's Healthcare Leadership Certification Program. She is goal-oriented with strong communication skills and is highly motivated to improve an organization's business processes.

[linkedin.com/in/amy-newman-b381521a](https://www.linkedin.com/in/amy-newman-b381521a)

Selected Project Roles & Experience

- + Program Manager for Massachusetts Water Resource Authority's ongoing CloudSuite upgrade including Finance, Supply Chain, HCM, and WFM modules. Amy leads project planning deliverables while managing a team of 20+ consultants and contractors, overseeing business process improvements in tandem with upgrade activities while ensuring adherence to budget and timeline over the course of this three-year implementation. As program manager, Amy ensures the right stakeholders are in the room to make decisions and serves as the primary escalation point for project risks, action items, and decisions.
- + Project Manager for Infor HCM CloudSuite Stabilization and Process Improvement effort and Cloud Migration at Atlanta Public Schools. Atlanta Public Schools reported this effort decreased the time it took their end users to complete their work from 14-16 hours per day to just eight! This affected HR management for over 8,000 employees. The Process Improvement project was an enhancement of current functionality and introduction of new functionality, including over 12 different workstreams. As the Project Manager for Operational support at Atlanta Public Schools, she led RPI in providing managed services support for the IT department for training and coverage of open positions
- + PMO Engagement Manager at Charleston Area Medical Center where she supported the team with Infor CloudSuite Financials and Supply Chain. Amy helped lead planning deliverables, managing a team of over 13 internal consultants, and acted as a point of escalation.

Skills

- + Healthcare Information Technology
- + Operations Management
- + Purchasing & Procurement
- + Business Process Improvement
- + Project Planning
- + Inventory Control
- + Forecasting
- + Account Management
- + Software Documentation
- + Cross-Functional Team Leadership



Amy Newman

RPI Consultants, Program Manager, PMP

- + Lead Project Manager at Bayhealth, where she supported a team of 10 through a GHR, Infor CloudSuite Financials, and v11 Payroll Implementation. Amy oversaw all budgeting, deliverable maintenance, and Infor communication and escalation to ensure all products were delivered on time and within the client's expected level of quality.
- + Lead Implementation Project Manager for Pipeline Health. Amy was responsible for creating the project charter, project plan, and all project initiation deliverables and tasks. Additionally, she assisted with requirements alignment and tracing to ensure the client had necessary tracking documentation throughout the implementation.
- + Senior Project Manager at five health care systems where she led the implementation of V10 Infor/Lawson Financials & Supply Chain. During these implementations, Amy was responsible for all project plan deliverables, overseeing business processes improvements, and managing internal team members to ensure timelines were achieved.
- + As the GPO for a large hospital system, Amy negotiated and contracted directly with the manufacturer for all supplies and services. In this role, she managed the Medical & Surgery spending of \$220 million, was responsible for all supply chain across IDN, and she directed all Supply Chain Change Management initiatives including standardization and utilization projects. She also partnered with Lee Memorial Health System, the Sarasota Health System, and the Central Florida Health Alliance for a strategic contracting initiative.



Ariane Silva

RPI Consultants, Sr. Human Capital Management Consultant

Overview

Product Expertise

- + Infor HCM
- + Absence Management
- + Configuration Console
- + Payroll (V11 & S3)
- + Benefits
- + Talent Acquisition
- + Performance & Goals
- + Compensation

Ariane Silva is a Senior Infor CloudSuite HCM Certified Consultant focused on Global Human Resources (GHR) and Benefits implementations. She has supported various projects across Infor CloudSuite HCM and all three Lawson S3 suites. Ariane specializes in leading GHR implementations, as well as developing client-specific training documentation, in addition to preparing training and test environments. Ariane is well-versed in the COBRA, ACA, Payroll, and Benefits details required of HR professionals.

Additionally, her experience crosses international lines, working previously as a consultant in Brazil where she supported ERP systems for diverse clientele.

Ariane's patience and attention to client needs enhances her ability to build positive relationships with end users, leading to effective training delivery, testing cycles, and Go-Lives.

Infor certifications include: HCM Consultant –GHR, and Talent Management Consultant – Talent Planning. LinkedIn Profile: [linkedin.com/in/ariane-silva-3b59707b](https://www.linkedin.com/in/ariane-silva-3b59707b)

Selected Project Roles & Experience

- + Lead Benefits Consultant for the City and County of Roanoke, supporting the HCM CloudSuite upgrade and GHR implementation. Ariane optimized benefit plans, led discovery and testing for GHR and Benefits, and provided design recommendations. She also helped with HR interfaces, mapping, employee life cycle, conversions, and documentation, while assisting with Payroll and GHR testing.
- + Sr. HCM Lead Consultant for the Town of Apex, NC, overseeing the implementation of GHR and Benefits. Ariane ensured effective integration with existing operations, collaborating with various departments to align the project with their needs. She led the client through discovery, design, documentation, training, and testing, significantly contributing to the project's success.
- + HCM Business Analyst for Maryland National Capital Parks & Planning Commission Cloud Migration Project. Successfully led testing and training and provided data validation and integration/interface support.
- + HCM Lead Consultant for MJHS Health System CloudSuite Migration. Managed conversion design and data cleanup during the migration workshop, reviewed documentation for the current state analysis, and finalized the future state design. Assisted with the super user training and design workshops, along with system configuration and SIT prep.
- + Lead Benefits Consultant for UC Health, successfully directing discovery, design, testing, and issue resolution for the Benefits module in a full GHR implementation. Ariane trained all HR end users and worked on the TA and BN migrations to multi-tenant, participating in each testing pass and assisting with various technical issues.
- + Lead Benefits Consultant for WakeMed Health and Hospitals, focusing on Open Enrollment setup, processing, and error resolution. Ariane successfully directed discovery, design, testing, and issue resolution for the Benefits module in a full GHR implementation. She advised leadership on best practices, supported the team through training and testing, and assisted with benefits enrollment.
- + HCM Consultant for Bellin Health, responsible for supporting Benefits year-end processes, W2 printing, and ACA compliance.
- + Business Analyst for Yuma Regional Medical Center focused on supporting of implementation by creating documentation for Employee Relations, Benefits, Open Enrollment, Employee Health & Safety, Talent Acquisition, Employee and Manager Space.

Skills

- + Process Implementation
- + Process Improvement
- + Process Review
- + Training and Development
- + Benefits Vendor Integration



Alesandro Gargano

RPI Consultants, Financials Consultant

Overview

Product Expertise

- + Infor FSM
- + General Ledger
- + Cash Management
- + Account Payables
- + Accounts Receivable/Billing
- + Spreadsheet Designer
- + Config Console
- + Infor Lawson (Legacy)

Since joining RPI in 2021, Alesandro or "Sani" has had the opportunity to work on multiple projects and gain knowledge on the implementation of CloudSuite technologies, specifically FSM. In 2022, Mr. Gargano passed the exam to become an Infor Certified Professional FSM Financials Consultant.

Prior to RPI, Alesandro worked as a logistical analyst for Leidos, specifically dealing with government contracting efforts. He was able to redesign the inventory process for their bases overseas and increase their supply chain management efficiency. He has a BA in Finance and a MS in Human Resource Management.

When he isn't busy analyzing financials, implementing CloudSuite, and improving the processes of his clients, Alesandro enjoys rooting for the Baltimore Ravens, fishing, cooking authentic Italian food, and making homemade Limoncello.

To see more about Alesandro's experience: <https://www.linkedin.com/in/alesandro-gargano/>

Selected Project Roles & Experience

- + As a Business Analyst for Bayhealth's full CloudSuite Implementation, Alesandro assisted with the build of various financial modules and conducted multiple phases of testing (SIT and UAT) within the finance module. He also created script books for end users to utilize in their testing process.
- + As Business Analyst for ProHealth's CloudSuite Implementation he assisted with gathering test scripts for unit testing.
- + Implemented Infor CloudSuite FSM as a Consultant for Charleston Area Medical Center. Alesandro was responsible for Proof-of-Concept prep & solution prototype modifications, Accounts Receivable, Billing, Cash Management, and Accounts Payable module configuration, GL conversion support, reconciliation build and documentation, and each testing cycle. A key resource on this project, he also worked on custom report development, technical development (configurations), cutover planning, and Go-Live activities.
- + Provided ongoing Ad Hoc Support for Marshfield Clinic Health System, including CU demos, configuration assistance, process documentation/reengineering, and module-specific training.
- + Development support for an Infor CloudSuite FSM migration project for Great River Energy, including Infor Document Management configuration and support.
- + Business Analyst for Kansas City Area Transportation Authority providing On-Demand services to support their Infor environment.
- + Founder and facilitator of RPI's CloudSuite Bootcamp series, including both CloudSuite 101 and CloudSuite Financials.

Skills

- + Communication
- + Customer Service
- + Critical Thinking
- + Documentation
- + Process Improvement



Cindi Brackins

RPI Consultants, Principal Financial Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + Infor Lawson
- + Global HR (GHR)
- + General Ledger (GL)
- + Accounts Payable (AP)
- + Accounts Receivable and Billing (AR/BL)
- + Project Accounting
- + Asset Management (AM)
- + Cash Ledger (CB)

Cindi Brackins has over 20 years of experience working in financials, process improvement, and project management consulting and is a Certified Infor CloudSuite and Infor Financials Consultant. She has led numerous financial implementations and upgrades, as well as provided project management services in Infor CloudSuite, Infor Lawson projects, and Infor Global HR projects. Her expertise is comprehensive, including workflow design, system builds, testing, metrics, and go-live support. She has also provided oversight to Global HR projects involving data file conversions, interface mapping, and system builds.

Prior to RPI, she worked for Mission Health System as a Financial Informatics Manager where she managed the design, implementation, and maintenance of the automated financial applications and related software for a large healthcare system. While there, she directed and participated in the strategic evaluation, selection, development, implementation, budget, education, and enhancements of financial information systems and peripheral system interfaces.

Cindi has an undergraduate degree in accounting, and a master's degree in healthcare administration. Highly respected in her field, she is frequently asked to provide presentations to the Infor User Group community.

LinkedIn Profile: <https://www.linkedin.com/in/cindi-brackins-12851021/>

Selected Project Roles & Experience

- + Lead Infor Financials Consultant for Infor Financials and Supply Management on Infor CloudSuite at Northern Colorado Water. Responsible for support, design, and testing of Global Ledger, Project Ledger, Payables, Intercompany Billing, Cash & Treasury Management, Asset Accounting, and Reconciliation Management.
- + As Lead Infor Financials Consultant of Activities, Accounts Receivable and Billing & Revenue Management for Locum Tenens Staffing, she converted a client from Great Plains to Infor on Accounts Receivable and Activity Management. She was a primary financial consultant responsible for support of design and testing of Activity Management and Billing/Revenue setup, procedures, and documentation.
- + Lead Infor Financials Consultant for various Infor CloudSuite Global Ledger proof-of-concept sandbox engagements. These have been for organizations who wish to learn Global Ledger and do some preliminary design before an Infor CloudSuite project implementation.
- + Lead Infor Financials Consultant for two ongoing healthcare Infor CloudSuite engagements.
- + Lead Financials Consultant for full CloudSuite FSM implementation at WakeMed. Cindi led the financials team through the project lifecycle to a successful go-live in March 2022. Responsibilities included system design, build, testing and training support, issue resolution, migration using Infor Data Migration Factory, and onsite go-live support.
- + Lead Financials Consultant for full CloudSuite FSM implementation at Denver Health. Cindi led the financials team through the project lifecycle to a successful go-live in September 2021. Responsibilities included system

Skills

- + Workflow Design
- + Automated Financial Applications
- + Vendor Integration
- + Conversions
- + Training and Testing



Cindi Brackins

RPI Consultants, Principal Financial Consultant

design, build, testing and training support, vendor integration, issue resolution, mapping, and conversion support.

- + Lead Infor Financials Consultant and Project Manager at Joslin Diabetes Center for Infor Financials and Supply Management. Her responsibilities included project plan development, weekly status updates, budget, and timeline management, as well as responsibility for support, design, and testing of financial modules.
- + At Connecticut Children's Medical Center, she was the Lead Infor Financials Consultant and Project Manager for Infor Financials and Supply Management. Her responsibilities included project plan development, weekly status updates, budget, and timeline management, as well as responsibility for support, design, and testing of financial modules.
- + As the Lead Interface Coordinator for Infor Global HR implementation at Children's Medical Center of Dallas, she was responsible for extraction and conversion of all data into Global HR. She was also the Lead Infor Financials Consultant for Implementation of Activity Management and General Ledger, where she acted as the primary Infor Financials consultant responsible for support of design and testing Activity Management and General Ledger setup and procedures.



Sherry Brewer

RPI Consultants, Senior Technical Consultant

Overview

Product Expertise

- + CloudSuite
- + Certified Lawson Administrator
- + Certified Landmark Developer
- + Microfocus Cobol
- + Installation & Maintenance of BSI, LBI, IPA, RQC, MSCM, ISS
- + Lawson (Legacy)
- + Infor Security Administration

Sherry Brewer has been a Senior Technical Consultant with RPI since 2019. With a bachelor's degree in computer science and over two decades of systems administration experience with Infor Lawson and related software and systems, Sherry brings a wealth of knowledge and Infor product expertise to every client she works with.

Sherry is RPI's lead resource for all CloudSuite Managed Services engagements in both the private and public sector. As a Certified Lawson Administrator and Landmark Developer, RPI clients upgrading and implementing Infor software count on Sherry for her technical mastery and functional expertise, particularly in finance, payroll, information technology, and human resources.

Prior to joining RPI, Sherry provided technical support and guidance for numerous Infor clients at Atos, Inc. During her tenure with Atos, along with the day-to-day issues and demands, she handled multiple implementations along with application and environment upgrades, working closely with leadership, end users, and account managers. She excelled at bringing together technical requirements of Infor's software and optimizing its operational workflow.

Sherry resides in Tampa, Florida, loves the outdoors, and enjoys spending time with her family and friends. She can be found on LinkedIn: [linkedin.com/in/sherry-brewer-ab249b8](https://www.linkedin.com/in/sherry-brewer-ab249b8)

Key Project Experience

CloudSuite Implementations

In addition to being the primary point of contact for RPI's Managed Services practice, Sherry also supports CloudSuite Implementations throughout the entirety of the project lifecycle, ensuring a smooth transition to continuous operational support. This enables her to seamlessly administer systems during the transition phase.

Key Responsibilities & Skills	Notable RPI Clients
<ul style="list-style-type: none"> + Provision and administer Landmark and LSF environments, maintaining system performance and efficiency + Tech lead for AP Automation & Finance implications for CloudSuite implementations + Coordinate between clients and RPI analysts and consultants for functional-based Infor issues + Security administration and user provisioning 	<ul style="list-style-type: none"> + Rancho, CA Water District + Town of Apex, NC + Kansas City Area Transit Authority + Marshfield Clinic Health System



Sherry Brewer

RPI Consultants, Senior Technical Consultant

Managed Services Lead

Sherry is presently the Lead Technical Consultant for RPI's Managed Service engagements. In this role, she provides L2 and L3 escalation support for a variety of Infor CloudSuite and Lawson clients.

Key Responsibilities & Skills	Notable RPI Clients
<ul style="list-style-type: none"> + Perform monthly CU pre and post tasks for Multi-Tenant Customers + Execute daily maintenance tasks for CloudSuite clients including review and clean-up of Async and ION BOD errors + Provide documentation to review and perform purging/data cleanup tasks with Multi-Tenant clients + Perform Landmark CU upgrades for both Landmark Runtime and Landmark Applications + Convert multiple clients to LDAPS configuration + Troubleshoot various technical issues and customizations across all managed services clients + Apply patches, CUs, and updates to application and environments to include LSF, Landmark, Smart Office, Portal, Ming.le and LBI + Conduct monthly maintenance on managed services clients along with data refreshes from one product line to another (S3 and GHR) + Administer Landmark and LSF environments, maintaining system performance and efficiency + Handle security requests and updates as well as ISS syncing Federated systems 	<p><u>Infor Cloud Suite</u></p> <ul style="list-style-type: none"> + San Gabriel Valley Water Company + Marshfield Clinic Health System + WakeMed + Books A Million <p><u>Infor Lawson</u></p> <ul style="list-style-type: none"> + City of High Point + Bon Secours Mercy Health + Cape Fear Valley Health + Kennedy Krieger Institute + Oaklawn Hospital + SAIA + Campbell County Health



Valerie Holschen

RPI Consultants, Principal Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + Infor Lawson (Legacy)
- + Human Capital Management
- + Payroll
- + Absence Management
- + Benefits
- + BSI
- + Microsoft Office

Valerie is a skilled Project Leader with over twenty years of experience implementing Infor Software Solutions. After starting with RPI Consultants in November 2021, she has proven leadership and management abilities in multiple full-cycle Human Capital Management (HCM) implementations and comprehensive experience building and maintaining client relationships, ensuring quality services are delivered with demonstrated success through on-location and remote work.

Before joining RPI, Valerie was the Service Delivery Manager at Infor, ensuring all projects and clients received the attention they deserve, firstly from an HCM best practices perspective, but also in terms of customer service. Valerie has performed on-premises, single-tenant, and multi-tenant cloud migrations. During her time working for Ciber, she personally developed and grew their Managed Services team, and served as escalation point for all project issues. She also holds a B.S. in Civil Engineering from the Missouri University of Science & Technology.

As she has grown with RPI, Valerie has gained experience in our CloudSuite Bootcamps as a thought leader. Having co-lead some HCM Bootcamps, and taking the lead on two CloudSuite Payroll Bootcamps, Valerie has demonstrated her thorough knowledge and skills. By working in these trainings with clients face-to-face she has exceptionally demonstrated her breadth of knowledge.

When Valerie isn't helping to mastermind RPI's latest & greatest HCM solution implementation, she enjoys traveling with her family to see as much of the world as possible.

She can be found at [linkedin.com/in/valerie-holschen](https://www.linkedin.com/in/valerie-holschen)

Infor Certifications: *Global HR Consultant | Global HR Payroll Associate*

Selected Project Roles & Experience

- + Since starting at RPI, Valerie has been engaged with San Gabriel Valley Water on a variety of projects. While they were still on Infor Lawson, she provided Managed Services support for GHR and Benefits and supported client in move from 5/40 work schedule to 9/80 in preparation for their ongoing Payroll implementation. Valerie serves as a subject matter expert for this Payroll implementation, supporting both RPI and client project leads by providing guidance on best practices for design and testing and helping troubleshoot issues.
- + At Frederick County, Valerie is the Lead Payroll Consultant, supporting current state analysis and payroll parallel activities as part of the client's HCM migration from S3 single-tenant to multi-tenant Cloudsuite.
- + As Payroll Lead for the State of South Dakota's GHR MT Implementation, Valerie presently supports current state analysis, payroll parallel and data transformation activities. This work is in lead up to their eventual Payroll and WFM implementation, where Valerie will lead the end-to-end implementation of multi-tenant Payroll.

Skills

- + Solution Architecture
- + Service Delivery
- + ERP Implementations
- + Human Capital Management
- + Technical Architecture
- + Project Management
- + Training & Empowerment



Valerie Holschen

RPI Consultants, Principal Consultant

- + Valerie previously supported the City of Greensboro with ad hoc project initiatives. Most notably, she performed setup, error resolution, data validation and cleanup related to producing W2s in preparation for client's 2023 fiscal year end.
- + At ProHealth, Valerie served as the Lead HCM Consultant for the client's second phase of their Cloudsuite implementation, supporting the end-to-end implementation of the Payroll and Absence Management modules. In this role Valerie conducted testing and payroll parallel activities, in addition to leading end user training and providing go-live and post live support.
- + Valerie also served as a Senior Payroll and Absence Management consultant for Infor CloudSuite implementation at Ballard Healthcare. In this role she was responsible for unit test, SIT and UAT execution, validation & issue resolution. She also designed configuration updates, conducted conversions, provided and super user training for the Ballard Health team. Valerie remained engaged through the entirety of the project lifecycle, seeing the implementation through go-live and providing post-live support.
- + At Books a Million!, Valerie provides ongoing ad hoc Managed Services support for a wide range of HR and Payroll needs. Valerie provides reactive services such as incident resolution for system issues, support requests for W2s and retro payments, report development, payroll processing and reporting questions and super user training. She also provides proactive system administration and supports client requests related to Infor's biannual CU's.
- + In addition to Books A Million, Valerie's career at RPI has involved supporting a wide range of Managed Services clients, providing both proactive and reactive service support.
- + Prior to RPI, Valerie was a Service Delivery Manager at both Infor and Ciber where she built and maintained customer relationships, ensuring the delivery of quality services.



Katrina Garrett

RPI Consultants, Senior Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + Lawson Financials (AC, AM, AP, GL)
- + Lawson Procurement
- + Microsoft Office
- + Crystal Reports
- + Perceptive Content

Katrina is a certified Infor CloudSuite Financials Consultant with an extensive background in financial systems administration. She is a strong partner on a project and a skilled collaborator with project leadership, clients, and 3rd party vendors. Throughout her career, she has led, implemented, and managed many enterprise-wide initiatives, in addition to acting as a mentor and developing team resources. She is recognized for her innovation and creativity in designing solutions that support complex business processes.

In addition to her knowledge of Lawson Financials, she is certified in Lawson Procurement. She spent almost two decades at a large hospital system, where she led the ERP team, served as the applications supervisor, as well as being an implementation specialist. She has a B.S. in Accounting with a concentration in

Information Systems from Virginia Polytech. When not working, Katrina enjoys actively engaging in outreach initiatives within the community.

LinkedIn profile: [linkedin.com/in/katrina-garrett-3144a0233](https://www.linkedin.com/in/katrina-garrett-3144a0233)

Selected Project Roles & Experience

- + As the Lead Financial Consultant on the CloudSuite FSM implementation for Loomis Sayles, she facilitated data conversion mapping, system build, interface design, cost allocations design/build, testing and end user training. The system design leveraged multiple currencies and the project went live on the scheduled Go-live date. She also provided the client post Go-live support.
- + As the Technical/Functional finance lead on the Marshfield Clinic project, she worked closely with the Report Developer to develop a list of archive reports in Lawson S3 using SQL.
- + As the Functional lead on the P.C. Richard & Son project, she conducted end user training for users moving from Smart Office to Mingle, and trained end users on Lawson MS Addins.
- + As IS&T manager at the University of MD Medical System, she supported Finance, Supply Chain, and the Procure-2-Pay teams on the v10 Infor application and designed and implemented solutions to optimize business processes. In addition to providing Go-Live and on-going support to end users, she also conducted end-user training.
- + At Bon Secours Mercy Health System, she was an Application Supervisor, managing ERP team Projects and Change Requests for all system updates, patches, and enhancements for IT applications. She was responsible for overall system readiness in support of version upgrades and Go-Live activities of new ERP modules. She managed data conversions, approved interface designs for ERP application development and drove the completion of project tasks. Katrina also coordinated with external and internal parties on system integrated testing based upon input from the ERP architects, system analysts, and auditors.

Skills

- + Project Management
- + System Implementation & Upgrades
- + Process Improvement & Automation
- + Report Development
- + Management
- + Training



Katrina Garrett

RPI Consultants, Senior Consultant

- + At Ernst & Young LLP, she served in a dual role as Project Manager and Supply Chain Lead on ERP implementation upgrading HCM, Finance, and Supply Chain from Infor (Lawson) S3 to CloudSuite for an organization comprised of 15 hospitals and 50+ outpatient centers. She managed a \$4.9 million project resource budget that included third party subcontractors and performed periodic evaluations of each team member's project performance. She provided project updates to Program Leadership and the Executive Steering Committee. In addition to facilitating design workshops to develop and configure a solution to support the client's business needs, she also led the Conference Room Pilot testing to validate system design.
- + As a Financial Systems Analyst for the AMERIGROUP Corporation, she planned, analyzed, developed, implemented, trained, and supported cost effective solutions to business issues. Other responsibilities included researching and resolving issues related to the integrity and reasonableness of data used in creating regulatory reports, as well as creating, maintaining, and documenting current report generation process for finance and medical finance departments. Katrina participated in the Essbase 6.1 software upgrade, where she served as a liaison between finance, medical finance, and IT associates, ensuring timely completion and distribution of financial reports related to regulatory reporting.



Lisa Callahan

RPI Consultants, Senior Technical Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + SQL
- + SSRS
- + Birst
- + Crystal Reports

As an RPI Senior Technical Consultant and Infor certified Birst Administrator, Lisa is a reporting expert with advanced skills in report development and dashboard design. She has worked in the software space for over two decades and is proficient in SQL data extraction and manipulation.

Since joining RPI in May of 2022, Lisa has been an integral part of several major Infor CloudSuite implementations and migration projects across both the public and healthcare sectors. She has also spear-headed and been a principal contributor to the creation of RPI's first ever Birst training bootcamp. The bootcamp covers administration and reporting at an in-depth level for business and IT users. Lisa has also hosted webinars on various Birst-related topics that are available on RPI's website. Lisa has a master's degree in public

administration and a bachelor's degree in international politics. Prior to working with RPI Consultants, Lisa founded an international virtual BI user group. Find her on LinkedIn: <https://www.linkedin.com/in/lisacallahan/>

Selected Project Roles & Experience

- + Technical Consultant for WellSpan Healthcare completing Ad-hoc SQL and Crystal reporting requests for their Lawson v10 database.
- + Virtual and Live customized training in HR Talent Analytics and CSF Analytics for various public sector, health care, and supply chain customers. Provided in-depth admin and business user content.
- + Technical Consultant for Ballad Health in support of an Infor CloudSuite HCM implementation. Led the discovery and development of multiple Birst reports focused on benefits, payroll, OSHA, and a variety of other human resources-related reports.
- + Technical Consultant for University of Colorado Health supporting conversion from Lawson SmartNotes to Infor CSF Analytics.
- + Technical Consultant for a large healthcare organization in support of a custom Infor Lawson Archive Solution. Assisted with development, testing and documentation efforts.
- + Technical Consultant for MDOT providing analytics discovery and development for an Infor CloudSuite GHR implementation.
- + Technical Consultant for Great River Energy's Infor CloudSuite FSM Migration project. She led Birst reporting strategy and development efforts, including creating data modeling documentation. She also provided training to the client team, assisted with cutover efforts, and assisted with go live support.
- + Technical Consultant supporting Rancho California Water District with their Infor CloudSuite implementation project. Lead BI and reporting consultant, in addition to providing a variety of other assistance including discovery and general technical support.
- + Technical Consultant for Yolo County's CloudSuite Migration project. Responsible for Birst report development focused on accounts payable and finance data modeling and visualization. Supported GHR and payroll implementation and troubleshooting efforts.

Skills & Certifications

- + Data extraction & manipulation
- + Dashboard design
- + Report development
- + Technical Training
- + Technical Writing
- + Third-Party Logistics
- + Birst Administrator Associate
- + Birst Analyst Associate



Chirag Mittal

RPI Consultants, Senior Technical Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + Infor Certified IPA Developer
- + Infor Certified Landmark Developer
- + Infor Certified Process Automation Expert
- + Ming.le

Chirag Mittal is a Senior Technical Consultant located in Tampa, FL who has been with RPI since April of 2019. Chirag is a Certified Infor Developer with profound technology expertise on both Windows/MS-SQL and Unix/Oracle on-premises and Cloud platforms.

With experience on multiple Infor configuration, security, development, upgrade, and data conversion projects, he has helped Infor clients make the most of their technology investment for over seven years.

Throughout his career, Chirag has worked as a technical consultant, integration architect, systems analyst, programmer, and technical lead for various implementation and optimization projects.

His vast experience working within large and complicated ERP implementations, especially across the public and healthcare sectors, makes Chirag an invaluable technical resource on any project team. He can be found on LinkedIn: [linkedin.com/in/mittalchirag20](https://www.linkedin.com/in/mittalchirag20)

Selected Project Roles & Experience

- + As the Development Lead for Rancho California Water District, Chirag is currently leading a full Infor CloudSuite FSM and GHR implementation.
- + Part of the Security Configuration team for the West Basin Municipal Water District.
- + Helped integrate IBM Maximo and Infor Lawson for the Massachusetts Water Resources Authority.
- + As Technical Architect and Development Lead for Frederick County's CloudSuite Implementation, assisted with the requirements gathering, design, and implementation of technical development items including reports, integrations, configurations, and extensions of the CloudSuite product throughout the project lifecycle."
- + Chirag played a significant role in the technical development of Myrtle Beach's Infor CloudSuite GHR and FSM implementation, including designing approval flows and custom security.
- + Lead Developer for the Infor CloudSuite GHR and FSM implementation at Charleston Area Medical Center.
- + Chirag played a key role with the Infor CloudSuite GHR and FSM implementation at Ballad Health, specifically building custom action flows and implementing security.
- + As part of the Infor CloudSuite GHR and FSM implementation at Bayhealth, Chirag helped implement payroll configuration and custom IPAs.
- + Assisted with the implementation of Infor GHR CloudSuite at Lifespan Healthcare, building custom HIPAA flows, IPAs, configuring security, managing leave of absence, and developing a compensation module.
- + Worked on various Infor CloudSuite implementations, including GHR and Talent Acquisition at Yuma Regional Medical Center, GHR at Bellin Health, automation for Rush Copley Medical Center, implementation at Valley Healthcare, goals and performance at Cape Fear Valley Health, and an Infor Lawson upgrade at Apollo Healthcare.

Skills

- + Infor Process Automation
- + Infor Spreadsheet Designer
- + IDM
- + Security Services
- + Landmark Config Console
- + Upgrade Migration
- + Oracle to SQL Server
- + AD LDS (LDAP)
- + Landmark Pattern Language



Zach Custodio

RPI Consultants, Senior Financials Consultant

Overview

Infor Product Expertise

- + CloudSuite / Lawson
- + General Ledger (GL)
- + Accounts Payable (AP)
- + Asset Management (AM)
- + Project Ledger (PS)
- + Matching (MA)
- + Cash Ledger (CB)
- + Accounts Receivable (AR)
- + Lease Management (LM)
- + Expense Management (XM)

Mr. Custodio is Infor CloudSuite Financials certified with a strong competence in process improvement initiatives, phase two module implementations, upgrades, migrations, and test plan development and execution. Zach has worked on various CloudSuite and Lawson v10 upgrades, as well as Infor cloud migration efforts, managing and supporting testing cycles while developing process inventories, testing plans, and test scripts across AP, CB, AM, GL, LM, MA, AR, BL and AC. Zach has assisted in validating and troubleshooting niche client requests for Infor financials solutions and has led RPI efforts to keep ahead of upcoming FASB regulatory requirements. He has also presented on many modules and CloudSuite topics at User Groups and RPI Webinars.

With a Bachelor of Science degree in Finance from Towson University, Zach is known to RPI's clients as a consultant with an eternal "can-do" attitude complete with the know-how, flexibility, and eagerness to get the job done correctly. He is great at documenting new business process flows to help visualize the end result, which smooths the transition to new solutions for end users. He is an expert at updating and optimizing business processes with new and existing functionality. Prior to

working for RPI, Zach was a Business Analyst for Morgan Stanley where his responsibilities included loan trade analysis and execution, counterparty inquiries, updating closing procedures to accommodate regulatory requirements, customer relationship management, new employee training and mentoring, and performance analysis. When Zach is not hard at work, he enjoys traveling and outdoor activities with his dog such as boating, fishing, and camping.

LinkedIn Profile: [linkedin.com/in/zach-custodio](https://www.linkedin.com/in/zach-custodio)

Selected Project Roles & Experience

- + As Lead Financials Consultant on Town of Apex, NC's implementation of Infor Government Essentials, Zach led the client through system design and execution of Conference Room Pilot, Unit Testing, and continues to guide their ongoing project.
- + Zach was the AP/CB Lead for Great River Energy's FSM Implementation.
- + He was the lead bank reconciliation implementation consultant for Kansas City Area Transportation Authority, where he provided post live support and on demand services to their team.
- + As the CloudSuite Financials Consultant for Armed Forces Benefit Association, he handled the discovery, training, testing support, and post go live support.
- + Zach was the Lawson Financials Consultant for Olympic Steel Accounts Payable and Accounts Receivable implementation. His responsibilities included supporting requirements gathering and system design, configuration, testing, and post go live support.

Skills

- + Process Implementation
- + Training & Development
- + Documentation
- + Process Improvement
- + System Administration



Zach Custodio

RPI Consultants, Senior Financials Consultant

- + Zach was the Lead Financials Consultant for Campbell County Health's CloudSuite FSM Implementation, leading all project implementation activities for numerous FSM modules.
- + As Lead Finance Consultant for Asset and Expense Management for WakeMed's CloudSuite implementation, Zach led discovery sessions and provided super user training, support for testing and data validation, and performed solution design and mapping of integrations between multiple FSM modules.
- + As Finance Consultant for Denver Health, Zach led discovery sessions and provided super user training, support for testing and data validation, and helped to design and map out integrations between AP/AM with a changing GL structure.
- + As Lead Lawson Financials Consultant for v10 upgrade at Inova Health, Zach built process and interface inventories, developed test script, led differences training, provided post live support.
- + As Lead Financials Consultant for LM implementation for Genesis Health, Zach led design, training, conversion,
- + Zach provided support to the National Wildlife Foundation for Infor v11 Cash Module, handling bank reconciliation and daily and monthly processing.



Beau Hunt

RPI Consultants, Senior Technical Consultant & BI Architect

Overview

Proven Experience

- + Infor CloudSuite Financials and Supply Chain Implementation
- + Birst Development
- + EDI (810/832/850/855)
- + SQL / Crystal Reports Dev
- + LBI / Smart Notes / IBI
- + Configuration Console
- + Excel Add-ins & Spreadsheet Designer
- + Lawson v9 & v10 Implementations

Beau Hunt is a Senior Technical Consultant and BI Architect with a focus on the integration of Supply Chain business intelligence solutions. His practical knowledge combines a technology background and process improvement mind-set with extensive experience in business analytics and software design. He manages cross-functional teams with the goal of increasing efficiency, lowering costs, and increasing revenues, while continuing to focus on client results. Mr. Hunt's skillsets include designing, implementing, and managing Infor Lawson Business Intelligence solutions.

With over sixteen years of experience, he has an in-depth understanding of an initiative's business and technical aspects. In addition to leading numerous Lawson upgrade and process improvement projects, he has designed dashboards that provide organizations with comprehensive spend analysis reports, contract compliance, and Procure-to-Pay exception monitoring and tracking. He also has practice optimizing and troubleshooting EDI transactions within the Lawson environment. Prior to joining RPI, Beau held positions as Systems Analyst for a large organization and Product Manager for an inventory management software solution.

LinkedIn Profile: [linkedin.com/in/beauhunt](https://www.linkedin.com/in/beauhunt)

Selected Project Roles & Experience

- + Senior Report Consultant with San Gabriel Valley Water responsible for the creation and documentation of all net-new reports within Birst and Infor CloudSuite Financials. Beau led multiple report training sessions to ensure proper knowledge transfer and ongoing support for the technical team.
- + Senior Technical Consultant, Birst Architect and Trainer for Yolo County supporting an Infor CloudSuite Migration project.
- + Senior Report Consultant for ongoing support with Maryland National Parks. Beau was primarily responsible for the creation of and maintenance of reports as well as interface configuration and troubleshooting issues for the client.
- + He was the lead LBI developer for ground-up buildout of LBI Supply Chain Dashboards, an endeavor that consisted of over 200 reports supporting Sourcing/Purchasing/Data/AP/Distribution Departments.
- + Beau conducted an EDI Systems review and clean-up/redesign project which resulted in over a 90% reduction in weekly EDI failures and increased productivity for Purchasing and AP departments.
- + At a large organization, he led and developed a RNI process improvement initiative that allowed for an 80% reduction in RNI within a four-month period.
- + BI Architect at WakeMed. Beau led all requirements gathering and analysis of current reporting needs and engaged the client in discussions on future design iterations. He then worked to create custom reporting dashboards.



Beau Hunt

RPI Consultants, Senior Technical Consultant & BI Architect

- + Senior Technical Consultant and BI Architect at University of Maryland Medical System. Beau led all Technical Development with the client team utilizing custom Birst reports. During this engagement he worked to understand their needs and found workarounds to complex reporting scenarios.
- + Senior Technical Consultant and BI Architect for Ballard Health for an Infor CloudSuite Implementation. Led design of custom reporting including facilitation of a Dashboard Analytics Workshop. Also assisted with system integration testing and reporting security.
- + Senior Technical Consultant and BI Architect for Charleston Area Medical Center supporting an Infor CloudSuite FSM Implementation. Led reporting strategy and development efforts.
- + Senior Solutions Architect and Conversion Lead at Denver Health. Beau oversaw all financial and supply chain reports including the discovery and configuration utilizing Birst, LBI, and Configuration console tools. He was also responsible for the development and execution of conversion tools to bring over several years of finance and supply chain data for the client.
- + Senior Supply Chain and Reporting Consultant at Wake Medical Center's Infor CloudSuite Transformation project. Beau was responsible for the overall re-design and configuration of the supply chain modules and reports in preparation for the client's move to the cloud. He led a multitude of workshops and trainings to ensure full knowledge transfer for end users.
- + Senior Supply Chain consultant at Global Health Exchange, where he was primarily responsible for the requisition discovery, configuration, testing, and training for the client.
- + Beau led a Cloud Migration project consisting of 150+ reports across SCM/IT/Finance/Management & HR Dashboards (CM) to a successful completion. His use of Contract Management allowed for the management of Special Items on PO25 Agreements.



Sue Pokorny

RPI Consultants, Senior HCM Consultant

Overview

Product Expertise

- + Infor CloudSuite
- + Global HR
- + HR Talent
- + Benefits (with ACA)
- + Employee Relations
- + Occupational Health & Safety
- + Performance Management
- + Position Management
- + Infor Lawson (Legacy)

Sue Pokorny is a Human Resources and Capital Management professional with 25 years of Human Resources experience in both the public sector and healthcare. Having worked across Infor's full suite of Human Resource applications provides her the ability to specialize in all project phases, including discovery, design, implementation, training, solution optimization, and post go-live support. She is a hardworking, system-oriented consultant with the ability to listen, analyze and solve issues.

She has successfully implemented a variety of Infor HCM systems and upgrades ranging from Lawson HCM to Infor HR Talent Management and Infor Global HR. Sue has a Bachelor of Science in Human Resource Management from DeVry University. Since joining RPI in 2021, Sue has led and participated in multiple Infor CloudSuite implementations for GHR, HR Talent, Benefits, Payroll, Absence Management, and Talent Acquisition, lending her extensive HCM experience to help guide the team to an optimal solution.

In her spare time, Sue enjoys spending time with her family and friends, traveling, reading, watching movies and boating. She can be found on LinkedIn: [linkedin.com/in/sue-pokorny-bb8a0918b](https://www.linkedin.com/in/sue-pokorny-bb8a0918b)

Selected Project Roles & Experience

- + Senior HCM Consultant for Maryland Department of Transportation (MDOT) implementation including HR Talent, Performance Management, Employee Relations, Leave of Absence, Compensation, Position Budget Management and Occupational Health. Partnered with seven multifunctional HR organizations and integrated them into a cohesive model. Supported the entire implementation lifecycle as well as providing Go-Live and Post-Live support.
- + Senior HCM Consultant for Ballad Health HCM CloudSuite implementation including Global HR, Employee Relations, Benefits, Compensation structures, Position Budget Manager, and Health & Safety. Led the realignment of data including Jobs, Positions (both Union and Non-Union), Supervisors, and Departments, in preparation for their successful GHR implementation thereby ensuring a new system with accurate data. Supported the entire implementation lifecycle as well as providing Go-Live and Post-Live support.
- + Senior HCM Consultant for Childrens of Alabama managed services contract for Benefits solution optimization.
- + HCM Consultant for Bayhealth HCM CloudSuite implementation including Global HR, Employee Relations, Benefits, Compensation, and Talent Acquisition. Led the implementation of Benefits and supported the entire implementation lifecycle as well as providing Go-Live and Post-Live support.
- + Manager of HRIS/Compensation at Bassett Medical Center where she managed the implementation and maintenance of Infor LTM, Talent Acquisition, Benefits, Performance Management, and Lawson HCM systems. Sue partnered with IT to develop plans for proposed systems and system upgrades to ensure system security and the confidentiality of employee data. She also worked with HR leaders to define information needs and sources, the design and utilization of the HCM system, and to develop HR procedures to increase efficiency and protect data integrity. In addition to managing the preparation of all standard and custom HR/Payroll reports, she also managed

Skills

- + Testing
- + Debugging
- + Report Generation & Analysis
- + Issue Resolution
- + Troubleshooting
- + Complex Problem Solving
- + Team Building



Sue Pokorny

RPI Consultants, Senior HCM Consultant

the compensation program through the annual review process, conducting ongoing reviews and analysis of compensation structure and pay levels.

- + As an HRIS Specialist at Basset Medical Center, Sue researched and resolved HRIS problems, analyzed work processes, and recommended solutions to refine and improve processes. In collaboration with IT, she coordinated, reviewed, and tested Lawson HRIS system upgrades and patches. She managed compensation reviews, which required gathering and analyzing market data, reviewing current compensation practices, and grading jobs. She also assisted departments in writing and approving job descriptions and licensing requirements, in addition to maintaining the position control program for authorized staffing levels. Along with conducting all HR reporting, including regulatory and compliance reports, internal metrics, and ad-hoc requests, she worked with departments regarding policy interpretation and approved practices/procedures.



Lisa Rogers

RPI Consultants, Senior Supply Chain Management Consultant

Overview

Infor Product Expertise

- + CloudSuite / Lawson
- + Supply Management Suite
- + Requisitions
- + Business Intelligence
- + Recall Management
- + Mobile Supply Chain
- + EDI, GHX, IC, PO, WH, MSCM, RQC, RSS, MOA, ISD, AP/MMA, HR, GL, GL

Lisa Rogers is a Lead SCM Consultant located in Spring Hill, Florida who has been with RPI since January 2016. She has worked with the Infor Lawson ERP and CloudSuite enterprise software managing designs, implementations, and upgrades for over 29 years, with a strong focus on the healthcare sector and Supply Chain Management. She is an Infor Certified Supply Management consultant, and her expertise includes business analytics, process improvement, and project management. She is especially well-versed in supporting the end user experience and conducting streamlined training efforts to ease adoption to new solutions.

As a Lead SCM Consultant, Lisa has implemented many new facilities into Lawson and CloudSuite systems, including process and data master analysis, design, configuration, system integrated testing, cutover planning, and post go-live support. She is highly experienced in leveraging Lawson tools and functionality including Process Automation, MSCM and EDI to smooth operations and automate processes

in Supply Chain and brings a wealth of real-life experience from technical and project management perspectives. Lisa is a self-starter, well-organized, and detail-oriented, and holds a bachelor's degree in Business Management. Prior to RPI, she served as the SCM Analyst and Lawson System Administrator and Manager for a major ERP conversion at a large health system. She can be found on LinkedIn: [linkedin.com/in/lisa-a-rogers](https://www.linkedin.com/in/lisa-a-rogers)

Selected Project Roles & Experience

- + Lisa led a road mapping initiative for Children's of Alabama, resulting in an engagement to roll out service agreements. As Lead Supply Chain Management Consultant, Lisa performed analysis of setup, recommendations on additional build, training, and implementation of service contracts.
- + Lisa acted in a variety of support roles for various CloudSuite FSM Implementations, including notable clients such as Campbell County Health and Great River Energy. She provided EDI support at Cooper Health System and has most recently engaged with the University of New Mexico to support company consolidation.
- + As Lead Supply Chain Management Consultant for the CloudSuite implementation for WakeMed Health and Hospitals, Lisa successfully directed business process discovery, design, system build, and training, and advised on the FSM report migration & development. She led the client through multiple business process improvements, data clean up, and successful testing and training for Go-Live. At the request of the client, her contract was extended to provide post-Go-Live support and managed services for business application support.
- + As Lead Sr. SCM Consultant for University of Colorado Health's CloudSuite FSM Implementation, Lisa was involved with design enablement & design workshops, configuration & security workshops, current state analysis, and unit test script development. She led an as-is technical discovery session for RQ approvals and custom security roles and worked on the system configuration. She prepared for and executed onsite SIT testing, reviewed migration errors, integrated buyer modifications, and performed EDI validation. Other responsibilities included item master cleanup, requirements gathering, data migration, error report analysis,

Skills

- + Infor Certified Supply Management
- + Process Implementation
- + Process Improvement
- + Process Review
- + Training and Development
- + System Administration



Lisa Rogers

RPI Consultants, Senior Supply Chain Management Consultant

and issue resolution. Notably, Lisa directed the creation of a custom capital and contract request form that provided client leadership with transparency into funds request and disbursements, as well as approval tracking. Lisa also supported the University's acquisition of Parkview Health System.

- + Lead Sr. Supply Chain Management Consultant for the system upgrade for Orlando Health. While responsible for all supply chain modules during this upgrade, she had an especially focused effort on Punchout and Recall Management implementations. Lisa also led all discovery and support to this client through a large business acquisition.
- + Sr. Lawson SCM Consultant for WellStar Health System's incorporation of multi-company acquisition into Lawson. Responsible for end & super user training, post Go-Live support and troubleshooting of Purchasing, Storeroom, Receiving and Requisition processes. Developed template creation and optimization process via purchasing history and departmental review.

Approach to Scope of Work

We have provided a sample Managed Services Scope of Work as Appendix A to this proposal, and an Absence Management Audit Scope of Work as Appendix B. We look forward to discussing these with the City upon review.

References

At RPI, our customers are the hearts blood of what we do. Below we have provided several client references for projects similar to the City, and additional customer testimonials can be found on our website - <https://www.rpic.com/rpi-success-stories/>

Reference One: City of Greensboro, NC	
POC Contact Information	Our customers consider us their intermediaries for Reference Contact situations. Please contact the Proposal POC Evan Winebarger for coordination of Customer Reference Contact. Email: EWinebarger@rpic.com Phone: 770-853-7796 To see more about our City of Greensboro experience, see: City of Greensboro Levels Up HCM Skills - RPI Consultants Greensboro NC Streamlines GHR Payroll - RPI Consultants
Summary of Project	The City of Greensboro has been an Infor/Lawson customer since 2001. The City runs the full suite of Infor/Lawson applications as well as the Infor Enterprise Asset Management application. Greensboro has a population of 275,000 residents and approximately 4,200 employees. The City has contracted with Infor to migrate their system from Single-Tenant to the Multi-tenant SaaS model. As part of this project, they are upgrading from V10 to V11 for CloudSuite FSM, HCM, Payroll, Talent etc. and are adding some of our newest products Birst, Coleman and UAP. The City had chosen RPI in 2023 to be their managed service provider as they navigate CloudSuite and engage in their business transformation.
Project Cost	This is customer and RPI confidential and is not shared in an RFP Response format
Reference Two: Marshfield Clinic Health System, Wisconsin	
POC Contact Information	Our customers consider us their intermediaries for Reference Contact situations. Please contact the Proposal POC Evan Winebarger for coordination of Customer Reference Contact. Email: EWinebarger@rpic.com Phone: 770-853-7796
Summary of Project	After having to stand down on the eve of their initial CloudSuite Go Live with another vendor, RPI was brought in to act on behalf of the client to guide them to a successful implementation 6 months later. This entailed the implementation of CloudSuite Financials & Supply Management. RPI provided Program Management along with Finance and Supply Chain support and assisting the customer with business process optimization efforts. RPI also provided technical support which included the development of items related to the RICE catalog (IPA, Configuration Console, and a lot of report development related to List Views, App Studio and Birst). Following their successful Go Live, RPI continues to provide optimization and stabilization efforts. Marshfield has also engaged with RPI for CloudSuite Managed Services to continue supporting their day-to-day operations as well as other CloudSuite initiatives. October 2021 – March 2022 (LIVE) and we continue to support various initiatives today. For more information about our experience with Marshfield Clinic, see: Marshfield Clinic CloudSuite Insights - RPI Consultants
Project Cost	This is customer and RPI confidential and is not shared in an RFP Response format
Reference Three: Hillsborough County Public Schools (HCPS), FL	
POC Contact Information	Our customers consider us their intermediaries for Reference Contact situations. Please contact the Proposal POC Evan Winebarger for coordination of Customer Reference Contact. Email: EWinebarger@rpic.com Phone: 770-853-7796
Summary of Project	Hillsborough County Public Schools has recently gone live on Infor's FSM & GHR. HCPS recently awarded RPI Consultants as VOC to manage their CloudSuite platform. Our engagement started with a full CloudSuite assessment and items to better align with the organization's business, and optimize their environment to streamline efficiencies better. To hear more about RPI's work with HCPS, please see: Hillsborough County's Cloud ERP Journey - RPI Consultants
Project Cost	This is customer and RPI confidential and is not shared in an RFP Response format

Minority / Women (M/WBE) Participation

If your firm is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985, provide copies of your certification(s). If your firm is not a certified M/WBE, describe your company's previous efforts, as well as planned efforts in meeting M/WBE procurement goals under Florida Statutes 287.09451.

RPI Consultants is not an M/WBE organization and is not requesting any such participation designation.

Subcontractors

Proposer must clearly identify any subcontractors that may be utilized during the term of this contract.

RPI Consultants is not using subcontractors for this effort.

Required Forms

- A. Proposal Certification - Complete and attach the Proposal Certification provided herein.
- B. Cost Proposal - Provide firm, fixed, costs for all services/products using the form provided in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.
- C. Non-Collusion Statement - This form is to be completed, if applicable, and inserted in this section.
- D. Non-Discrimination Certification Form - This form is to be completed and inserted in this section.
- E. Local Business Preference (LBP) - This form is to be completed, if applicable, and inserted in this section.
- F. Disadvantaged Business Enterprise Preference (DBEP) - This form is to be completed, if applicable, and inserted in this section.
- G. Contract Payment Method - This form must be completed and returned with your proposal. Proposers must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.
- H. E-Verify Affirmation Statement - This form must be completed and returned with your proposal.
- I. Sample Insurance Certificate - Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for the required coverage and limits.
- J. W-9 for Proposing Firm - This form must be completed and returned with your proposal.
- K. Active Status Page from Division of Corporations – Sunbiz.org Provide PDF of current page with your proposal.
- L. Signing Authority - Proposals shall include an attachment evidencing that the individual submitting the proposal, does in fact have the required authority.

We have completed the required forms and included them on the following pages.

A. Proposal Certification

CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the [City's on-line strategic sourcing platform](#) prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) RPI Consultants, LLC EIN (Optional): 37-1480199

Address: 1 North Haven Street Suite 201

City: Baltimore State: MD Zip: 21224

Telephone No.: 410.276.6090 FAX No.: _____ Email: kwayland@rpic.com

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**): 120

Total Bid Discount (**section 1.05 of General Conditions**): TBD

Check box if your firm qualifies for DBE (**section 1.09 of General Conditions**): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Richard Leigh Stout

Name (printed)

11.19.2024

Date



Signature

Partner

Title

revised 09-2022

B. Cost Proposal

RPI's Strategic Partnership Agreement consists of both a fixed price and hourly pricing component. The hourly rates listed in this response are the sum of total cost divided by the hours listed. Additional details, including outcomes provided under the fixed price portion of the program, can be found in [Appendix A](#).

SECTION VI - COST PROPOSAL PAGE

Proposer's Name: [RPI Consultants, LLC](#)

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Hourly Price - Annual Managed Supports Services...	
1. Estimated 25 hrs. per week / 1300 hrs. per year.	\$ 217.31 /HR
2. Year 3 - % Increase on Hourly Rate	3%
3. Year 4 - % Increase on Hourly Rate	2%
Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:	
4. Estimated 30 hrs. per week / 1560 hours per year	\$ 211.92 /HR
5. Estimated 33 hrs. per week / 1716 hours per year	\$ 209.48 /HR
6. Estimated 35 hrs. per week / 1820 hours per year	\$ 208.08 /HR
7. Estimated 40 hrs. per week / 2080 hours per year	\$ 205.19 /HR
Special Project #1: Infor Absence Management Post-Go-Live Audit	\$ 13,120 /Lump Sum
Proposers shall attach a separate quote with pricing breakdown by Title/ Role. The City of Fort Lauderdale may, at its discretion, choose to amend the contract with the Contractor for additional services for Special Projects. Please include an additional list of all Titles/Roles and their hourly rates on the attached Excel, Attachment A .	

Submitted by:

[Richard Leigh Stout](#)

Name (printed)



Signature

11.20.2024

Date

Partner

Title

C. Non-Collusion Statement



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and free from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

<u>NAME</u>	<u>RELATIONSHIPS</u>
_____	_____
_____	_____

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

Authorized Signature

Keith Wayland

Name (Printed)

Partner

Title

11.19.2024

Date

Rev 09-2022

D. Non-Discrimination Certification Form



CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH NON-DISCRIMINATION PROVISIONS OF THE CONTRACT

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

Authorized Signature

Keith Wayland, Partner

Print Name and Title

11.19.2024

Date

Forms Non-ISO 09/2022

E. Local Business Preference (LBP)

RPI is not asking for an LBP for this effort so has not completed this form.

F. Disadvantaged Business Enterprise Preference (DBEP)

RPI is not a DBE so has not completed the DBEP form.

G. Contract Payment Method

NOTE THAT RPI DID NOT COMPLETE THIS FORM AS RPI DOES NOT ACCEPT PAYMENT VIA P-CARD AT THIS TIME. WE ACCEPT ONLY ACH PAYMENTS. WE WILL WORK WITH THE CITY TO DETERMINE THE BEST OPTION FOR PAYMENTS UPON CONTRACT AWARD.

H. E-Verify Affirmation Statement



E-VERIFY AFFIRMATION STATEMENT

Solicitation/Bid /Contract No: RFP#380

Project Description:

The City of Fort Lauderdale, Florida is seeking qualified, experienced and licensed firm (s), to provide Infor CloudSuite application support and managed services for the City.

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- A. all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- B. all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: RPI Consultants, LLC

Authorized Company Person's Signature: 

Authorized Company Person's Title: Partner

Date: 11.19.2024

I. Sample Insurance Certificate



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER R.K. Tongue Co., Inc. 4940 Campbell Blvd Suite 200 Nottingham MD 21236		CONTACT NAME: Niccele Winpiger PHONE (A/C, No, Ext): (410) 752-4008 FAX (A/C, No): (410) 752-4611 E-MAIL ADDRESS: mwinpiger@rktongue.com	
INSURED RPI Consultants LLC 1 N Haven St Ste 201 Baltimore MD 21224-1614		INSURER(S) AFFORDING COVERAGE INSURER A: Hartford Underwriters Insurance Co INSURER B: Rated by Multiple Companies INSURER C: Zurich American Insurance Company INSURER D: INSURER E: INSURER F:	
		NAIC # 30104 00914	

COVERAGES		CERTIFICATE NUMBER: CL2461022833		REVISION NUMBER:		
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN/AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			30SBAAT2HRM	07/17/2024	07/17/2025
						EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 BASEP \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS ONLY			30SBAAT2HRM	07/17/2024	07/17/2025
						COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			30SBAAT2HRM	07/17/2024	07/17/2025
						EACH OCCURRENCE \$ AGGREGATE \$ 3,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	30WECAT20N4	07/17/2024	07/17/2025
						<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 Each Claim 1,000,000 Aggregate 1,000,000
C	Employment Practices Liability			MPL 1197015 - 02	07/17/2024	07/17/2025
						Each Claim 1,000,000 Aggregate 1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)						

CERTIFICATE HOLDER RPI Consultants LLC	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER R.K. Tongue Co., Inc. 4940 Campbell Blvd Suite 200 Nottingham MD 21236		CONTACT NAME: Niccele Winpiger PHONE (A/C, No, Ext): (410) 752-4008 FAX (A/C, No): (410) 752-4611 E-MAIL ADDRESS: nwinpiger@rktongue.com	
INSURED RPI Consultants, LLC 1 N Haven St #201 Baltimore MD 21224		INSURER(S) AFFORDING COVERAGE INSURER A: Scottsdale Indemnity Company INSURER B: Travelers Property Casualty Company of America INSURER C: INSURER D: INSURER E: INSURER F:	
		NAIC # 25674	

COVERAGES

CERTIFICATE NUMBER: CL2461022837

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Cyber Liability/Errors & Omissions Claims-Made			ZPL-41N66380-23-I5	07/17/2024	07/17/2025	Each Claim 5,000,000 Aggregate 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Both Primary and Excess coverage are on the above mentioned policy.

CERTIFICATE HOLDER

CANCELLATION

RPI Consultants LLC	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
---------------------	--

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J. W-9 for Proposing Firm

Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification Go to www.irs.gov/FormW9 for instructions and the latest information.	Give form to the requester. Do not send to the IRS.														
Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i> , below.																
Print or type. See Specific instructions on page 3.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; vertical-align: top;"> 1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <u>RPI Consultants, LLC</u> </td> <td style="width: 40%;"></td> </tr> <tr> <td style="vertical-align: top;"> 2 Business name/disregarded entity name, if different from above. </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) <u>C</u> <small>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) </td> <td style="vertical-align: top;"> 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.) </td> </tr> <tr> <td style="vertical-align: top;"> 3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/> </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 5 Address (number, street, and apt. or suite no.). See instructions. <u>111 Haven St, Ste 201</u> </td> <td style="vertical-align: top;"> Requester's name and address (optional) </td> </tr> <tr> <td style="vertical-align: top;"> 6 City, state, and ZIP code <u>Baltimore, MD 21224</u> </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 7 List account number(s) here (optional) </td> <td></td> </tr> </table>		1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <u>RPI Consultants, LLC</u>		2 Business name/disregarded entity name, if different from above.		3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) <u>C</u> <small>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>		5 Address (number, street, and apt. or suite no.). See instructions. <u>111 Haven St, Ste 201</u>	Requester's name and address (optional)	6 City, state, and ZIP code <u>Baltimore, MD 21224</u>		7 List account number(s) here (optional)	
1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <u>RPI Consultants, LLC</u>																
2 Business name/disregarded entity name, if different from above.																
3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) <u>C</u> <small>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)															
3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>																
5 Address (number, street, and apt. or suite no.). See instructions. <u>111 Haven St, Ste 201</u>	Requester's name and address (optional)															
6 City, state, and ZIP code <u>Baltimore, MD 21224</u>																
7 List account number(s) here (optional)																
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"> Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="width: 40%;"> Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div> </td> </tr> </table>			Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div>												
Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div>															
Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Sign Here</td> <td style="width: 45%;"> Signature of U.S. person <u>Christie Barth</u> </td> <td style="width: 40%;"> Date <u>5/8/24</u> </td> </tr> </table>			Sign Here	Signature of U.S. person <u>Christie Barth</u>	Date <u>5/8/24</u>											
Sign Here	Signature of U.S. person <u>Christie Barth</u>	Date <u>5/8/24</u>														
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 . What's New Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification. New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065). Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they																
Cat. No. 10231X		Form W-9 (Rev. 3-2024)														

K. Active Status Page from Division of Corporations – Sunbiz.org

We have provided a copy of our Sunbiz registration on the following pages.

DIVISION OF CORPORATIONS



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Foreign Limited Liability Company
RPI CONSULTANTS, LLC

Filing Information

Document Number M16000005938
FEI/EIN Number 37-1480199
Date Filed 07/25/2016
State MD
Status ACTIVE

Principal Address

1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Changed: 02/06/2023

Mailing Address

1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Changed: 02/06/2023

Registered Agent Name & Address

C T CORPORATION SYSTEM
1200 SOUTH PINE ISLAND ROAD
PLANTATION, FL 33324

Authorized Person(s) Detail

Name & Address

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1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Title Partner

POLLARD, GREG
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BRAUN, JUSTIN L
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Title Managing Partner

WAYLAND, KEITH
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Title Partner

STOUT, RICHARD L
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STE. 201
BALTIMORE, MD 21224

Annual Reports

Report Year	Filed Date
2022	04/16/2022
2023	02/06/2023
2024	02/14/2024

Document Images

02/14/2024 -- ANNUAL REPORT	View image in PDF format
02/06/2023 -- ANNUAL REPORT	View image in PDF format
04/16/2022 -- ANNUAL REPORT	View image in PDF format
03/31/2021 -- ANNUAL REPORT	View image in PDF format
03/28/2020 -- ANNUAL REPORT	View image in PDF format
04/13/2019 -- ANNUAL REPORT	View image in PDF format
04/19/2018 -- ANNUAL REPORT	View image in PDF format
03/30/2017 -- ANNUAL REPORT	View image in PDF format
07/25/2016 -- Foreign Limited	View image in PDF format

Florida Department of State, Division of Corporations

L. Signing Authority

Note that Richard Leigh Stout, Partner at RPI Consultants has signed the Cover Page of our proposal and is duly authorized to contractually obligate RPI to the project.

Appendices

We have included the following documents as part of our proposal:

A - Proposed Managed Services Project Scope of Work

B - Absence Management Audit Scope of Work

C - Value Adds



Appendix A –Proposed Managed Services Project Scope of Work

We have included our Proposed Managed Services Project Scope of Work on the following pages, and look forward to discussing this with the City after you review.

CITY OF FORT LAUDERDALE, FL

PROPOSED MANAGED SERVICES

STATEMENT OF WORK



Prepared For

CITY OF FORT LAUDERDALE, FL

Prepared By

Evan Winebarger

Regional Sales Director,

M: 770-853-7796

ewinebarger@rpicons.com

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1 STATEMENT OF WORK

This Statement of Work ("SOW") represents a new support-based engagement between RPI Consultants LLC ("RPI") and the City of Fort Lauderdale, FL ("Client" or "The City"). The purpose of this document is to define requirements, services, costs, and other information relevant to the work to be completed by RPI, assuming successful execution of this agreement. This SOW is considered to be the governing contractual agreement required for the engagement between City of Fort Lauderdale, FL and RPI Consultants LLC.

1.1 OVERVIEW

The City of Fort Lauderdale recently completed its implementation of Infor GHR Multi-tenant, Payroll, and FSM in January of this year. The City experienced turnover of key resources during the deployment project and has been met with some challenges during the post go-live stabilization period, especially in terms of end user adoption and proficiency. These gaps in user knowledge and confidence have resulted in a sometimes-overwhelming volume of support requests being fielded by the organization's IT team in addition to their responsibilities for managing the organization's systems and platforms. The City is seeking professional services to support their technical staff on the journey from CloudSuite stabilization to optimization, and to meet the enablement needs of business users in order to become more mature in their use of the new solution.

The City of Fort Lauderdale has engaged RPI to become a long-term partner with the expertise and experience to guide technical and functional staff through this stage of its ERP evolution and ensure that the City is able to maximize the value it receives from the investment in its Infor products. RPI will provide managed services and strategic consulting support for Infor CloudSuite and related software to City of Fort Lauderdale, FL. RPI's services are comprised of service delivery management, application administration, business application support, and release impact management for applications listed in Appendix A. The City's focus for this engagement is to stabilize day-to-day operations, address configuration improvements, increase automation to improve efficiency, and empower the business with the knowledge they need to succeed.

1.2 TERM

The term of this SOW shall be for a period of 12 months starting July 1, 2024 and ending on June 30, 2025. The SOW can be terminated by either party, without cause, with a 90-day written notice. City of Fort Lauderdale, FL will be responsible for all payments due up through termination date.

2 SCOPE OF SERVICES

The services to be provided by RPI are based upon the criteria documented in Appendix A and apply only to the in-scope applications defined therein. If these criteria change during the contract term, or if City of Fort Lauderdale, FL desires additional services to those defined as in scope for this SOW, RPI will address scope modifications through the Service Change Management Process defined in Appendix A.

2.1 SERVICE DELIVERY MANAGEMENT

Throughout the term of this engagement RPI will manage the reporting of progress and delivery of all services defined herein. City of Fort Lauderdale, FL will be assigned an RPI Service Delivery Manager who will act as the primary liaison for all engagement communications, issue resolution, escalation, risk mitigation, resource management, metrics management, and service change management.

Deliverables for this service include:

- + Governance Plan
- + Monthly Status Reports
- + Metric Reports and Reviews
- + Service Change Management Status
- + Quarterly Business Review

2.2 APPLICATION ADMINISTRATION

RPI will be responsible for standard repeatable, proactive administrative support for the in-scope applications defined in Appendix A of this SOW. Proactive support includes monitoring of monthly cloud application updates in advance and the release impact management activities defined below. Application Administration responsibilities include:

- + Tenant Administration
- + Application-level Monitoring
- + Error Handling
- + Release Impact Management
 - o Release Review
 - o Impact Analysis
 - o Change Planning

2.3 SERVICE DESK SUPPORT

2.3.1 Business Application Services

RPI will provide City of Fort Lauderdale, FL support for Business Application issues, inquiries, and on-demand service requests through Service Hub, our incident management system. City of Fort Lauderdale, FL will triage issues from end-users, submit tickets to Infor as needed, leveraging their Infor support plan, and then escalate, if necessary, to the RPI managed services team by initiating an incident through the Service Hub tool.

2.3.2 Extension Management

RPI will provide on-demand support for existing extensions, interfaces, configurations in addition to development of minor enhancements and reports.

2.3.3 Service Level Agreement (SLA)

RPI strives to respond to all incidents immediately if possible and offers the response SLA detailed below:

Type	Severity/ Priority	Response Time	
		During Business Hours	Outside of Business Hours
Incidents	Critical	1 Hour	1 Hour into next business day
	High	2 Hours	2 Hours into next business day
	Medium	4 Business Hours	Next Business Day
	Low	8 Business Hours	Next Business Day
Requests	All	4 Business Hours	Next Business Day

Business hours are defined as 8:00 AM – 6:00 PM Eastern Time during weekdays excluding major holidays.

Other needs for the availability of RPI resources during non-business hours can be accommodated with the provision of at least 5 business days advanced notice. The hourly rate will be charged for outside-of-business-hours availability according to the level of RPI resource assigned to be on standby whether or not RPI services are called upon during that time.

Please refer to Appendix A for additional information on the service schedule and a full list of RPI observed holidays.

2.3.3.1 Severity Definitions

Severity Level	Business Impact
Critical	An Incident affecting a business-critical application or service that affects a high number of Users and for which a delay in restoration of service is not acceptable. Needs to be resolved as soon as possible. Major impact on more than one person or VIP.
High	An Incident affecting a business important application or service is significantly degraded wherein a high number of Users cannot carry out normal work responsibilities, no alternative is available, and for which a delay in restoration of service is not acceptable.

Severity Level	Business Impact
Medium	An Incident affecting normal (non-critical or important) applications and a limited number of Users. System or component is down or degraded, but requester can carry out normal work responsibilities and/or temporary alternative is available.
Low	An Incident with low or no visibility that has no direct impact on systems, Customers, Users, or revenue.

2.4 PROJECTS ON-DEMAND

Requests for consulting assistance that fall outside the scope of Business Application Services or Extension Management will be considered Projects. Client may request Projects On-Demand through this agreement. RPI will scope and estimate any requested Projects and seek approval from Client before commencing billable work. Very large or complex projects may require a separate Statement of Work.

2.5 ROLES & RESPONSIBILITIES

The following roles and responsibilities may be assigned over the course of the engagement based on the scope of the services defined within this Statement of Work. Roles and responsibilities may be adjusted depending on the skill sets of the assigned client resources.

2.5.1 RPI Consultants Responsibilities by Role

Role	Responsibility
Engagement Manager The Engagement Manager is responsible for project delivery quality assurance and escalation.	+ Resource management + Services quality assurance + Issue escalation resolution + Quarterly Reviews
Service Delivery Manager The Service Delivery Manager is the primary point of contact and responsible for all major project documentation.	+ Status reports and meeting agendas + Other Deliverables + Issue Escalation
Technical and Functional Consultants RPI's Lead Technical Consultants are Infor product and solution experts.	+ Technical and Functional service requests + Product and technical issue escalation + System training and education
Business & Technical Analysts Analysts are responsible for documentation, quality assurance testing, and core product configuration.	+ Support consulting and service delivery management activities, as needed + Develop first drafts of deliverables + Perform system and QA testing activities

2.5.2 City of Fort Lauderdale, FL Responsibilities by Role

Role	Responsibility
------	----------------

Sponsor Executive or Leader advocating for the services provided.	<ul style="list-style-type: none"> + Provides timely and effective resolution to issues escalated by the project team. + Determines program priorities and approves all changes to Program scope. + Monitors program quality and integrity with respect to business goals.
Service Manager The primary point of contact working directly with the RPI Service Delivery Manager.	<ul style="list-style-type: none"> + Acts as a single point of contact for The City + Coordinates and directs day-to-day activities for The City team members supporting this Managed Services engagement + Evaluate RPI's Deliverables
IT Team The IT Team is responsible for tasks related to hosting, server maintenance and networking, database administration, and other IT/IS related activities.	<ul style="list-style-type: none"> + Resolve network issues + Complete technical tasks not available to RPI + Coordinate across IT/IS team as necessary
Business Users Business users have institutional and functional business process knowledge necessary to identify and manage impacts of any application changes on business processes.	<ul style="list-style-type: none"> + Participate in testing activities under RPI guidance + Advise on any client-specific requirements related to incidents, issues, or requests involving or impacting business processes for which they are responsible (in full or in part) + Update internal business process documentation, if applicable + Engage in knowledge transfer from the RPI team, as applicable

3 ASSUMPTIONS

- Remote access and all appropriate credentials (VPN access, Infor Concierge account, admin access, if applicable) will be shared with the RPI team.
- Client will be responsible for ensuring the availability and coordination of its personnel, computer equipment, and software as required by RPI in the performance of all diagnostic services.
- Client must maintain a current maintenance agreement with Infor and all other relevant third-party vendors for all licensed applications and technologies used for systems in scope.
- Client will participate in testing and will be responsible for approving all application and environment configurations and extension changes prior to deployment to production.
- Performance issues or application issues as a result of Client error are outside the scope of this SOW and will be the responsibility of the Client to remedy. RPI will make commercially reasonable efforts to work with Client to troubleshoot and rectify problems resulting from Client error.
- Implementation or configuration of new software by Infor or other third-party vendors is not in the scope of this SOW.

4 SERVICES COST SUMMARY

Description	Fee Type	Monthly Fee	12-Month Term Cost
Base Fee for Managed Services Includes one-time new client onboarding, Service Delivery Management, and all in-scope Application Administration activities.	Fixed	\$3,500	\$42,000
Service Desk Support Estimate Includes Business Application Services and Extension Management for issues or requests submitted through ServiceHub. This work has a minimum term total of 480 hours to qualify for the reduced flat hourly rate of \$185. Client anticipates actual term total to be approximately 555 hours and that effort estimate has been used to provide the monthly and total term cost estimates in this summary.	Time & Materials at \$185/hr	\$8,556**	\$102,675**
Projects On-Demand Any work that falls outside of Business Application Services and Extension Management will be charged per the rate card. A change request will be executed for any Project On-Demand work.	Time & Materials per Rate Card	TBD	TBD
NOT TO EXCEED TERM TOTAL			\$150,000

* Service Desk Support will be billed as worked on a monthly basis.

**If onsite service is requested, this budget will be used for travel reimbursement costs.

4.1 PROJECTS ON-DEMAND

For any requested Projects On-Demand, RPI will charge hourly rates based upon Resource Level:

Resource Level	Hourly Rate
Partners & Practice Directors	\$240
Principal Consultants, Program Managers, Practice Managers, Solution Architects	\$220
Senior Project Managers, Lead Application Consultants, Lead Technical Consultants	\$205
Project Managers, Technical Consultants, Functional Consultants	\$185
Business Analysts, Technical Analysts, Project Coordinators	\$145

5 TERMS & CONDITIONS

The following Terms & Conditions shall be considered binding for any services provided by RPI to the Client relevant to the work outlined in this Statement of Work.

1. Invoicing and Remittance Terms

1.1 Billing and Payment Terms

Payment terms: RPI invoices are submitted monthly and due within 15 days of receipt.

- **Fixed price** services will be billed on the first day of the month for the month in which services are to be performed.
- **Time and materials** services will be billed in arrears on the last day of each month that services are performed.

All travel and out-of-pocket expenses will be billed as actuals. Out-of-pocket expenses include such items as travel, lodging, airport parking, and/or mileage at the rate published by the IRS. All expenses shall be reimbursed for actual out-of-pocket amounts, with the exception of meals. Meals shall be reimbursed based on current GSA standard per diem rates.

1.2 Interest and Late Payments

Any amounts remaining unpaid for more than 30 days from the issue date shall accrue interest at a rate of the lesser of 1.5% per month or the highest rate allowed by law.

2. Disclaimer, Liability, and Warranty

2.1 Disclaimers

RPI Consultants shall not be liable for any damage resulting from loss of data, loss of profits, and loss of use of products or equipment or for any incidental or consequential damages. The Client's right to recover damages caused by RPI Consultants' fault or negligence shall be limited to monies actually paid by the Client for the services rendered.

2.2 Limitation of Liability

In providing these services, RPI Consultants shall not be liable for incidental or consequential damages of any kind. The warranty of good workmanship shall be the only warranty expressed or implied by this agreement. RPI shall not be liable for delays or failures in performance with respect to this agreement due to causes beyond its control e.g., force majeure, epidemics, war, riots, strikes, delays in transportation or part shortages, or inability for causes beyond its control to obtain necessary labor, materials, or manufacturing facilities.

RPI or RPI's service agent's liability on any claim, whether based on contract, warrant, tort (including negligence) or otherwise, arising out of, or connected with this agreement, shall in no event exceed the amount of the service billings associated with it. In no event shall RPI or RPI service agents be liable for consequential, incidental, special, or exemplary damages including, but not limited to, loss of substitute facilities, equipment or service, downtime costs, customer data, or claims by customers of Client for such damages.

6 APPROVAL & ACCEPTANCE

IN WITNESS WHEREOF, the parties hereto each acting with proper authority have executed this Statement of Work. By signing below, Client hereby acknowledges and agrees to the work required as documented herein, and to the payment of the fees required herein.

CITY OF FORT LAUDERDALE, FL	
Printed Name	Title
Date	Signature
RPI CONSULTANTS LLC	
Printed Name	Title
Date	Signature
INVOICE & CONTACT INFORMATION	
Contact Name	
Contact Address	Contact City, State, Zip
Email Address	<div><input type="checkbox"/> Please Check for Invoicing via Email</div> <div><input type="checkbox"/> Please Check if PO# is Required</div>
PO# or Other Instructions	

7 APPENDIX A – SERVICE PARAMETERS

This Appendix defines the parameters for the services defined in this SOW. Any changes to the parameters below could constitute a change in scope and will be managed via the Service Change Management process defined in this SOW.

7.1 SYSTEM ENVIRONMENT

Infor CloudSuite Environment	
Infor CloudSuite Applications	CloudSuite HCM: GHR, Benefits, MT Payroll CloudSuite FSM: All core modules, MSCM
Infor CloudSuite Tenants	PRD, TRN, TST

7.2 ONE-TIME CLIENT ONBOARDING

RPI will set up a kick-off session with City of Fort Lauderdale, FL to establish Managed Services for the Infor CloudSuite Tenants. RPI will document the processes that will govern the services throughout the life of the engagement. The kick-off session is used to initiate the CloudSuite Managed Services program and conduct the planning required to complete the Governance Plan and Standard Operating Procedures document.

7.2.1 Deliverables

Deliverable	Responsibility
Governance Plan A document that defines the processes governing the support services delivery for this engagement at the operational, program and strategic levels. The plan will describe the roles and responsibilities for both the RPI and Client service teams, communication plan including details around status meetings and reporting, issue and risk management including escalations, scope of the engagement captured in the client environment definition and project services and the service change management process.	RPI Service Delivery Manager
Standard Operating Procedures (SOP) A document that includes how an authorized system/application user works with the RPI team to request services or report incidents; describes the approach to orient team personnel on established and new managed services procedures and policies; proactive maintenance and administration duties to be performed including release impact management processes; and explains the systematic process and tools for receiving, distributing, tracking reporting, and closing incidents and service requests.	RPI Service Delivery Manager

7.3 SERVICE DELIVERY MANAGEMENT DELIVERABLES

Deliverable	Description
Monthly status report	Status report containing open and closed tickets during the reporting period.
Metric reports and reviews	Report containing information on Metrics/KPIs established during the transition-in phase and documented in the Governance Plan.
Service Change Management Status	Report containing information on changes to In-Scope Services that will affect the delivery of the service and SLA.
Quarterly Business Review	A quarterly meeting to review the performance of the Managed Services program.

7.4 CLOUDSUITE APPLICATION ADMINISTRATION

Component	Task
Configure job notifications	Send notifications in the event of async failures
Async Queues	Manage Async Queues
Job Console	Review jobs and clear job queues per procedures at your site
Process Server In-basket	Review process server console for notifications
ION Desk BODs	Using ION Desk check for unprocessed BODs, verify connection points
IPA Worunits	Cleanup IPA workunit data, purge data for processed jobs, user actions, from the Work Unit History List
Purge Queue Content	Purge completed transactions from the queues that you use in LA, ASYNC, and PFI modules
Repository Module	Purging out personalizations not in use – if an actor has been disabled and no longer an employee, there personalizations can be purged.
Maintain growing Business Classes	Check for business classes that are growing, ActorContext, ActorRole, Identity, IdentityActor, ActorProxy, PFIUser, PFIProxy, RoamingUIProfile, WorkFile
Data Copy/Refreshes	Backup configurations, IPAs, process definitions, service definitions, security configurations (anything not considered environment data). Backup custom security classes, replication sets Extract Infor Birst Data

Component	Task
	<p>Submit request for data copy to Infor Cloud Operations</p> <p>Purge data lake on target system</p> <p>Delete Birst data on target system</p> <p>Purge other data from the target such as IPAworkunits and queue contents</p>

7.4.1 Release Impact Management

Component	Task
Review update documentation	<p>Scheduled release calendar</p> <p>Release KB Articles and release notes</p> <p>Security Change Report</p> <p>Confirm Security role changes and how to implement</p> <p>d/EPM updates</p> <p>ION content packs</p> <p>MSCM Handhelds</p> <p>Desktop tool update installers</p>
Schedule Sessions with Key Users to review upcoming release changes, determine how changes affect your environment and determine how to adopt new or changed functionality.	Change Management – Let them know what is coming, how do the changes impact your organization, point out areas where testing will be needed
Export all personalizations, configurations, and extensions and backup	Export and backup with CDEXPORT utility
Adjust job schedules to avoid execution during the release update window	Review the update schedule. Communication with user base.
Do not schedule data copy/migrations close to the update timeframe.	Review the update schedule. Communication with user base.
If PPRD exists, RPI runs validation and post update procedures to determine if there are any issues. RPI assists client with application regression testing.	PPRD procedure – 2 weeks prior to scheduled live release, could occur more than once during the window, RPI assists client with testing of business processes prior to live release.
Verify configurations again to ensure they are still valid after the release	CDVERIFY
Verify Async, ION Integrations, IPA Work Units, IDM Documents, Replication Sets, ION flows	After all post CU update tasks are completed
Handle LMIOBOX error if necessary	LMIOBOX error resolution

Component	Task
Update d/EPM, if necessary, per Confirmed Release Notes.	Update d/EPM Application Manager
Disable all terminated users in Infor OS CE UserManagement.	Infor OS CE documentation
Perform RICE smoke test to verify that RICE objects continue to operate after the update.	Validate RICE integration
Make security role changes as needed.	Review security role changes
Push out MSCM update packages if included. RPI will notify Client of any MSCM update packages. Client will push out package updates and verify handheld scanners and printers.	Client will verify MSCM handheld scanners and printers versions and update as needed
If the update includes updated versions of desktop tools used at your site, client installs the updated tools on client computers. Client will install desktop tool updates on client computers. RPI will Smoke test desktop tools installations on RPI computers while connected to Client Tenants.	Client Installs or updates desktop tools if any new versions in the reveal page (IPD, ISD, etc.) RPI will advise on installations
If the update includes an updated printer agent, client will install the update.	If you do not know how to install these updates, RPI will help advise with installation.
Ensure that Async Administration > ION Out-box is clear	Perform ION Out Queue Maintenance
Infor Birst updates – add updated replication sets for CloudSuite Applications, reset and run new rep sets.	Will be noted in CU documentation Birst releases are usually quarterly.
Infor Document Management (IDM) configuration updates	Test configuration changes deployed in your tenant. KB 2032409 includes xml configuration file deployed by Infor
Update ION Connector content update packs if use ION BODs and the ION Connectors	KB 2084493
Review Known customer impact KB	Post CU issues that are known and reported are documented here.
Review Supplementary updates	Further updates can be released, especially for emergency fixes

7.5 SERVICE DESK SUPPORT

7.5.1 Service Schedule

Business hours are defined as 8:00 AM – 6:00 PM Eastern Time during weekdays excluding major holidays.

After hours are defined as 6:01 PM – 7:59 AM Eastern Time during weekdays, Saturdays, Sundays & Holidays.

Holidays are New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving and Christmas Day.

7.5.2 Service Levels

Level	Definition	Responsible
Level One (L1)	Defined as initial triage. Interacting with End Users to understand the issue or request prior to being escalated to RPI. RPI agrees to take responsibility for Service Level One activities when given notice that the City's dedicated resource is/will be out of the office or otherwise unavailable.	City of Fort Lauderdale, FL (RPI Consultants will provide "backup" responsibility for Level One Service, when needed)
Level Two (L2)	RPI Technical / Functional support.	RPI Consultants
Level Three (L3)	RPI Expert Technical / Functional support.	RPI Consultants

7.5.3 Business Application Support

Component	Task
Reactive Service Desk for L2/L3 Application Issues, inquiries, ad hoc service requests	RPI will provide a systematic process to City of Fort Lauderdale, FL to report Business Application issues or submit inquiries. City of Fort Lauderdale, FL will triage issues from end-users, submit tickets to Infor as needed, leveraging their Infor support plan, and if necessary, escalate to the RPI managed services team if the issue or inquiry cannot be addressed. (See Infor Support Operations Handbook, Reference Guide, English.pdf) RPI uses Service Hub as the incident management system and City of Fort Lauderdale, FL will use this tool to initiate an incident with RPI.
L2/L3 functional or technical support for Application Incidents and Product Inquiries, requests	City of Fort Lauderdale, FL will triage as stated above.
Assist with configurations or Personalizations	Assist user if they are having difficulty with creating a personalization.

7.5.4 Extension Management

Component	Task
RPI will provide reactive support for existing extensions and development of minor enhancements upon request.	Extensions including action requests, workflows, interfaces, integrations, configurations, security, reporting, in addition to development of minor enhancements

7.6 OUT-OF-SCOPE SERVICES

Work not specifically listed above as In Scope is considered out of scope for this SOW. RPI will address any requested alterations to the scope of this SOW through the Service Change Management Process defined herein.

The following services are specifically not within RPI's scope of service:

1. Responsibilities identified as Infor's responsibilities in the Infor SaaS Delivery Guide under the Subscription roles and responsibilities section. (See [Infor Software as a Service \(SaaS\) Delivery Guide, English.pdf](#))
2. Support and maintenance of end-user and desktop hardware, software, and peripherals including handhelds related to the MSCM software.
3. Maintenance and operation of City of Fort Lauderdale, FL Network and VPN connection to Infor's Cloud.
4. Items in Appendix A that are clearly designated as a Client Responsibility.

7.7 SERVICE CHANGE MANAGEMENT

The following service change management process will be used to manage alterations to the baseline scope, schedule, and cost of the services or changes to any other aspect of the engagement operations that has a potential impact to the scope, schedule, or cost. RPI will not perform out-of-scope work or services until a Change Request has been approved.

7.7.1 Change Request Process

1. Notification of intended changes will be communicated in writing via a Change Request (CR) form and provide justification for the change and the impact to the services.
2. City of Fort Lauderdale, FL approver will approve or reject the change request within five (5) business days from the receipt of the CR.
3. If the City of Fort Lauderdale, FL approver does not approve or reject the CR within five (5) business days from the receipt of the CR and does not communicate a timeframe in which a decision will be made, the requested change will be considered deferred.
4. City of Fort Lauderdale, FL will designate approvers and alternates responsible for approving CRs.

Appendix B - Absence Management Audit Scope of Work

We have included our Proposed Project Scope of Work on the following pages, and look forward to discussing this with the City after you review.



CITY OF FORT LAUDERDALE

INFOR ABSENCE MANAGEMENT AUDIT

STATEMENT OF WORK



Prepared For

CITY OF FORT LAUDERDALE

Prepared By

Evan Winebarger

Senior Account Executive

P: 770-853-7796

ewinebarger@rpic.com

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REVISION HISTORY

Date	Version	Description of Revision

1 STATEMENT OF WORK

This Statement of Work ("SOW") represents a new project-based engagement between RPI Consultants LLC ("RPI") and City of Fort Lauderdale ("Client" or "the City"). The purpose of this document is to define requirements, services, costs, and other information relevant to the work to be completed by RPI, assuming successful execution of this agreement.

1.1 TERM

The term of this statement of work begins as of the last date on the Approval & Acceptance page and continues through the completion of the project, no longer than one year.

1.2 OVERVIEW

The City of Fort Lauderdale completed its implementation of Infor GHR Multi-tenant, Payroll, and FSM in January of this year. The organization experienced challenges during the project with the Absence Management module and seeks an audit of its configuration (particularly for the Fire and Police unions) and identification of opportunities to optimize its use for the City.

RPI understands that Infor is a foundational part of the toolkit that supports your business processes. As a trusted partner, we can help you align with leading practices and optimize every area of your Infor solution to meet your goals. We also understand how struggles in one area of an integrated solution can have broader unwanted consequences across your back-end operations.

An RPI Infor HR Talent specialist will review the current system setup within Absence Management and meet with business users to understand the stabilization issues they have been experiencing and how the solution supports your Absence Management business processes. Based on the findings of this discovery process, the RPI team will define the top opportunities to optimize the module for City of Fort Lauderdale and lay out a prioritized plan for implementing the recommendations.

2 PROJECT SCOPE

Any services not explicitly defined in this Statement of Work under Project Scope may be considered out of scope. Additional services may incur additional costs at the agreed upon rate. Significant changes in scope may be quoted separately and executed through a scope change document.

2.1 APPLICATION SCOPE

- + **Infor CloudSuite Absence Management**

2.2 SERVICES SCOPE & APPROACH

RPI will employ the following approach to audit the identified module(s) and associated business processes with the goal of optimizing current Infor software usage at City of Fort Lauderdale.

1. Initiate & Plan

- 1.1 Introductory meeting with Client leadership, discussion of primary pain points and key areas of focus,
- 1.2 Establish system access for RPI resource
- 1.3 Finalize assessment timeline
- 1.4 Schedule discovery sessions and provide agenda

2. Discover & Analyze

- 2.1 Review system setup and transactional data (if applicable)
- 2.2 Meet with subject matter experts and business process owners. These sessions may be conducted remotely or onsite, according to Client preference.
- 2.3 Document and evaluate current state operations, considering people, processes, and technology
- 2.4 Provide initial high-level findings in the Discovery Summary
- 2.5 Identify optimization opportunities and conduct an initial prioritization based on cost/benefit considerations

3. Recommend & Align

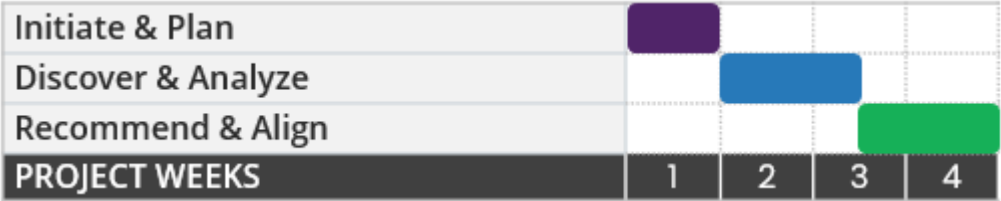
- 3.1 Deliver optimization recommendations
- 3.2 Discuss top opportunities with Client leadership and other key stakeholders to finalize priorities and strategic approach
- 3.3 Identify activities for which RPI support is required or desired and provide effort estimates
- 3.4 Deliver full Audit Report and Optimization Plan

2.3 DELIVERABLES

This engagement will produce a consolidated deliverable containing discovery summary notes, an audit report, and optimization plan.

2.4 TIMELINE

The sample timeline laid out below is based on current information and understanding of the application and services scope. As such, this timeline should not be considered binding, and your RPI team will work with you to finalize the project schedule with you as part of planning activities.



3 STANDARD ASSUMPTIONS

- Discovery interviews may be conducted in person and onsite at City of Fort Lauderdale or remotely at the Client's discretion. All other services are expected to be provided remotely.
- RPI resources will be given all necessary credentials and access to the servers/environments/applications in-scope for the project, including unimpeded access to independently initiate a remote connection. This may include Administrative System Access. If RPI resources are asked to work over screen-share, such as WebEx or Zoom, a change request for additional work effort will be needed to account for the loss in efficiency.
- The Client will assign a Project Manager to act as the primary point of contact with RPI, responsible for management of all Client resources and task assignments.
- The Client is responsible for ensuring resource availability, coordination, scheduling, and attendance to meet the timeline and support the overall success of the project.

4 PROPOSED SERVICES BUDGET

Based upon the approach and scope presented in this SOW, the estimated consulting fees are provided below.

4.1 PROFESSIONAL SERVICES ESTIMATE

Role/Service	Resource Level	Rate	Est Hours	Est Cost
HR Talent Specialist	Lead Consultant	\$205	40	\$8,200
Solution Architecture / Project Coordination	Lead Consultant	\$205	24	\$4,920
ESTIMATE TOTALS			64	\$13,120

The above costs are an estimate; all work is performed on a time and materials basis. The projected resource level mix represents our best estimate. RPI manages projects to total budget.

4.2 TRAVEL

For any required travel, RPI will charge all reasonable out-of-pocket expenses. Out-of-pocket expenses include such items as travel, lodging, airport parking, and/or mileage at the rate published by the IRS. All expenses shall be reimbursed for actual out-of-pocket amounts, except for meals. Meals shall be reimbursed based on current GSA standard per diem rates.

Appendix C - Value Added Services

Value Adds to Our Customers

RPI's Bootcamps, Lunch & Learns and YouTube Videos - Your Infor & CloudSuite Training - Hosted by RPI's Infor Certified Experts

If your organization is embarking on a CloudSuite journey, it's important that your IT & business teams are up to speed first. Put them in a position to guide your business through a successful transformation to CloudSuite with RPI's CloudSuite Bootcamp. This is an in-person training hosted by RPI's Infor certified consultants at RPI's various offices across the United States. Limited slots are available on a first come, first serve basis so don't miss your chance.

RPI CloudSuite Bootcamps - RPI's CloudSuite Bootcamps are geared towards IT & business professionals whose organizations are preparing to embark on the journey to Infor's CloudSuite solution. No prior CloudSuite experience is necessary. This training is also ideal for new employees to organizations already on a CloudSuite environment. Typical attendee titles include: ERP Administrator, Senior Business Analyst, Manager of Enterprise Applications, process owners, IT Project Manager. Upcoming CloudSuite Bootcamps are listed below.

Classroom training for RPI's CloudSuite Bootcamps will be organized over three full days at RPI's training centers in either Baltimore, Tampa, or Kansas City. This is an in-person event only and will not be available to remote attendees. Training will be a combination of presentations and hands-on guided exercises. Each attendee will be granted access to RPI's CloudSuite tenant for the duration of the class. This is a small group event with approximately 6 to 12 attendees and several RPI team members to assist the group working through the material.

Note: For the most up-to-date bootcamps, please check out <https://www.rpic.com/bootcamps/> or reach out to the proposal POC for more information.

RPI Consultants Training on YouTube You can also visit ([\(1076\) RPI Consultants - YouTube](#)) to see many of the previous Bootcamp customers talk about their experiences. These include the City of Greensboro, Aultman Health, Central Ohio Transit Authority, and Marshfield Clinic Health. **One of the most recent videos RPI Leadership developed and presented was for the creation of an HCM Roadmap, to include Performance and Talent Management** <https://www.youtube.com/watch?v=Q0NPbaIQeYo>

RPI also has a blog page and knowledge base portal ([Knowledge Base - RPI Consultants](#)) that contains articles and posts written by the RPI Partners as well as Technical Leadership and Consultants – with a focus on providing professional insights and development to our customers and stakeholders. Some that are specifically valuable to the City include:

- **The 7 Steps to a Successful ERP Implementation - [7 Steps to a Successful ERP Implementation - RPI Consultants](#):** It is written by our Managing Partner, Keith Wayland, and outlines some ways to prepare your organization for a new ERP system.
- **2024 ACA Reporting Deadlines, Requirements, and Insights - [2024 ACA Reporting Deadlines - RPI Consultants](#):** It is written by our HCM Practice Director, Melissa Olson, and provides an overview of the reporting and furnishing requirements of the ACA Employer Shared Responsibilities (aka Employer Mandate).

RPI's Infor Lunch & Learns <https://www.rpic.com/lunch-and-learn/> help you elevate your Infor skills from anywhere! Hosted by RPI's Infor Certified Experts - From financial reporting and Global Human Resources to Supply Chain Management and Workforce Management, Lunch & Learns provide business users with the opportunity to get caught up on Infor CloudSuite's latest functionality. This includes using new tools, building custom views, creating reports, and maximizing use of existing applications. Sessions are intentionally kept small, accommodating a maximum of 6 per training. This ensures an intimate learning environment where each participant receives the necessary attention and oversight.

How Do RPI's Lunch & Learns Work?

- Individuals can attend a virtual session by paying a small one-time cost. The fee includes relevant workshop materials, three hours of in-depth training & lunch!
- Each session will begin at 11:00 AM EST and run until 3:00 PM EST, including a one-hour break for lunch. Attendees will receive a \$25.00 Grubhub gift card to order lunch from a restaurant of their choosing.
- Participants will have the opportunity to ask questions in real-time, work in sandbox environments, and have access to the instructor for hands-on support through the entirety of the session.

Why Should You Attend?

- With CloudSuite updates being released all the time, teams need to be able to mobilize quickly to optimize their processes and skillsets. Lunch & Learns offer organizations a cost-effective way to stay updated on the latest functionality while enhancing their employees' application skills.
- These training sessions are not only valuable for helping users upskill, but they also equip business units with the knowledge they need to better perform their jobs, ultimately helping their organizations operate with greater efficiency.
- Virtual sessions are hassle-free, accessible, and serve as an excellent starting point for RPI's more intensive Bootcamps.

End of Proposal



Thank you from RPI



Response For Supplier: RPI Consultants LLC

Event # : 380-0

Name: Infor CloudSuite Managed Services

Description: The City of Fort Lauderdale is seeking contract managed services from an Infor certified partner for Infor CloudSuite support in its ERP/INFOR Unit, Information Technology Division. The Contractor shall provide application support for Infor CloudSuite Financials and Supply Management and CloudSuite HCM and Payroll, Version 11.

Term: 2 Year Contract with two 1-year renewals.

Date created: November 21,
2024 6:53:54 AM EST

Preview date:

Open date: October 30, 2024
4:00:00 PM EDT

Close Date: 11/21/2024 02:00:00 PM EST

Date submitted: November 21,
2024 10:15:18 AM EST

Q & A open date: October 30,
2024 5:00:00 PM EDT

Q & A close date: November
14, 2024 5:00:30 PM EST

Dispute close date:

Responded To: 8 Out of 8 Lines

Total Bid Amount: 312,031,820.73 **Response Currency:** USD

Question Responses

Question	Answer	Attachment
Did you download, review, sign and re-upload the required forms?	Yes	RPI Required forms - Fort Lauderdale RFP380.pdf

Event # 380-0: Infor CloudSuite Managed Services

Question	Answer	Attachment
Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached - Anti-Human Trafficking Affidavit Per Florida Statute 787.06 (2024), (13).	Yes	
Florida Statute 787.06 (2024), (13) When a contract is executed, renewed, or extended between a nongovernmental entity and a governmental entity, the nongovernmental entity must provide the governmental entity with an affidavit signed by an officer or a representative of the nongovernmental entity under penalty of perjury attesting that the nongovernmental entity does not use coercion for labor or services as defined in this section. For purposes of this subsection, the term "governmental entity" has the same meaning as in s. 287.138(1).		
Do you acknowledge that if your firm is awarded this contract, your firm will have to complete and submit the attached Affidavit of Compliance with Foreign Entity Laws Per Florida Statute - §287.138, 692.201, 692.202, 692.203, and 692.204	Yes	

Response Attachments

Attachment
RPI Response to City of Fort Lauderdale Infor CS Managed Svcs RFP 380.pdf

Line Responses

Line 1: Estimated 25 hours per week / 1300 per year
Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:
Infor Managed Supports Services... Estimated 25 hours per week / 1300 per year.

Event # 380-0: Infor CloudSuite Managed Services

Infor Managed Supports Services... Estimated 25 hours per week / 1300 per year.

Item: INFOR MANAGED SERVICES SUPPORT Estimated 25 hours per week / 1300 per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,300.0000

Unit of Measure: HR

Bid Quantity: 1,300.0000

Unit Price: 217.3100

Extended Amount: 282,503.00

No Charge: No

No Bid: No

Line 2: YEAR 3 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year's 1-2.

Item: YEAR 3 - % INCREASE YEAR 3 - % INCREASE ON HOURLY RATE

Commodity Code: 958-77 Project Management Services

Quantity: 1.0000

Unit of Measure: PT

Bid Quantity: 1.0000

Unit Price: 3.0000

Extended Amount: 3.00

No Charge: No

No Bid: No

Line 4: YEAR 4 - % INCREASE ON HOURLY RATE

Description: Hourly Price - Annual Managed Supports Services... No pricing should be submitted here only % increase on hourly rate from Year 3.

Item: YEAR 4 - % INCREASE YEAR 4 - % INCREASE ON HOURLY RATE

Commodity Code: 958-77 Project Management Services

Quantity: 1.0000

Unit of Measure: PT

Event # 380-0: Infor CloudSuite Managed Services

Bid Quantity: 1.0000

Unit Price: 2.0000

Extended Amount: 2.00

No Charge: No

No Bid: No

Line 5: Estimated 30 hrs. per week / 1560 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 30 hrs. per week / 1560 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 30 hrs. per week / 1560 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,560.0000

Unit of Measure: EA

Bid Quantity: 211.9200

Unit Price: 330,595.2000

Extended Amount: 70,059,734.78

No Charge: No

No Bid: No

Line 6: Estimated 33 hrs. per week / 1716 hours per year

Description: Estimated 33 hrs. per week / 1716 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 33 hrs. per week / 1716 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,716.0000

Unit of Measure: HR

Bid Quantity: 209.4800

Unit Price: 359,467.6800

Extended Amount: 75,301,289.61

No Charge: No

No Bid: No

Line 7: Estimated 35 hrs. per week / 1820 hours per year

Description: Estimated 35 hrs. per week / 1820 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 35 hrs. per week / 1820 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 1,820.0000

Unit of Measure: HR

Event # 380-0: Infor CloudSuite Managed Services

Bid Quantity: 208.0800

Unit Price: 378,705.6000

Extended Amount: 78,801,061.25

No Charge: No

No Bid: No

Line 8: Estimated 40 hrs. per week / 2080 hours per year

Description: Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:

Estimated 40 hrs. per week / 2080 hours per year

Item: INFOR MANAGED SERVICES SUPPORT Estimated 40 hrs. per week / 2080 hours per year

Commodity Code: 958-77 Project Management Services

Quantity: 2,080.0000

Unit of Measure: HR

Bid Quantity: 205.1900

Unit Price: 426,795.2000

Extended Amount: 87,574,107.09

No Charge: No

No Bid: No

Line 9: Infor Absence Management Post-Go-Live Audit

Description: Proposers shall attach a separate quote with pricing breakdown by Title/ Role.

Item: SPECIAL PROJECT #1 Infor Absence Management Post-Go-Live Audit

Commodity Code: 918-71 IT Consulting

Quantity: 1.0000

Unit of Measure: LS

Bid Quantity: 1.0000

Unit Price: 13,120.0000

Extended Amount: 13,120.00

No Charge: No

No Bid: No

Required Forms

- A. Proposal Certification - Complete and attach the Proposal Certification provided herein.
- B. Cost Proposal - Provide firm, fixed, costs for all services/products using the form provided in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.
- C. Non-Collusion Statement - This form is to be completed, if applicable, and inserted in this section.
- D. Non-Discrimination Certification Form - This form is to be completed and inserted in this section.
- E. Local Business Preference (LBP) - This form is to be completed, if applicable, and inserted in this section.
- F. Disadvantaged Business Enterprise Preference (DBEP) - This form is to be completed, if applicable, and inserted in this section.
- G. Contract Payment Method - This form must be completed and returned with your proposal. Proposers must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.
- H. E-Verify Affirmation Statement - This form must be completed and returned with your proposal.
- I. Sample Insurance Certificate - Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for the required coverage and limits.
- J. W-9 for Proposing Firm - This form must be completed and returned with your proposal.
- K. Active Status Page from Division of Corporations – Sunbiz.org Provide PDF of current page with your proposal.
- L. Signing Authority - Proposals shall include an attachment evidencing that the individual submitting the proposal, does in fact have the required authority.

We have completed the required forms and included them on the following pages.

A. Proposal Certification

CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the [City's on-line strategic sourcing platform](#) prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) RPI Consultants, LLC EIN (Optional): 37-1480199

Address: 1 North Haven Street Suite 201

City: Baltimore State: MD Zip: 21224

Telephone No.: 410.276.6090 FAX No.: _____ Email: kwayland@rpic.com

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**): 120

Total Bid Discount (**section 1.05 of General Conditions**): TBD

Check box if your firm qualifies for DBE (**section 1.09 of General Conditions**): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Richard Leigh Stout

Name (printed)

11.19.2024

Date



Signature

Partner

Title

revised 09-2022

B. Cost Proposal

RPI's Strategic Partnership Agreement consists of both a fixed price and hourly pricing component. The hourly rates listed in this response are the sum of total cost divided by the hours listed. Additional details, including outcomes provided under the fixed price portion of the program, can be found in [Appendix A](#).

SECTION VI - COST PROPOSAL PAGE

Proposer's Name: [RPI Consultants, LLC](#)

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Hourly Price - Annual Managed Supports Services...	
1. Estimated 25 hrs. per week / 1300 hrs. per year.	\$ 217.31 /HR
2. Year 3 - % Increase on Hourly Rate	3%
3. Year 4 - % Increase on Hourly Rate	2%
Should the City decide to increase hours for Annual Managed Support Services, please provide additional hourly pricing:	
4. Estimated 30 hrs. per week / 1560 hours per year	\$ 211.92 /HR
5. Estimated 33 hrs. per week / 1716 hours per year	\$ 209.48 /HR
6. Estimated 35 hrs. per week / 1820 hours per year	\$ 208.08 /HR
7. Estimated 40 hrs. per week / 2080 hours per year	\$ 205.19 /HR
Special Project #1: Infor Absence Management Post-Go-Live Audit	\$ 13,120 /Lump Sum
Proposers shall attach a separate quote with pricing breakdown by Title/ Role. The City of Fort Lauderdale may, at its discretion, choose to amend the contract with the Contractor for additional services for Special Projects. Please include an additional list of all Titles/Roles and their hourly rates on the attached Excel, Attachment A .	

Submitted by:

[Richard Leigh Stout](#)

Name (printed)



Signature

11.20.2024

Date

Partner

Title

C. Non-Collusion Statement



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

<u>NAME</u>	<u>RELATIONSHIPS</u>
_____	_____
_____	_____

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

Authorized Signature

Keith Wayland

Name (Printed)

Partner

Title

11.19.2024

Date

Rev 09-2022

D. Non-Discrimination Certification Form



CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH NON-DISCRIMINATION PROVISIONS OF THE CONTRACT

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

Authorized Signature

Keith Wayland, Partner

Print Name and Title

11.19.2024

Date

E. Local Business Preference (LBP)

RPI is not asking for an LBP for this effort so has not completed this form.

F. Disadvantaged Business Enterprise Preference (DBEP)

RPI is not a DBE so has not completed the DBEP form.

G. Contract Payment Method

NOTE THAT RPI DID NOT COMPLETE THIS FORM AS RPI DOES NOT ACCEPT PAYMENT VIA P-CARD AT THIS TIME. WE ACCEPT ONLY ACH PAYMENTS. WE WILL WORK WITH THE CITY TO DETERMINE THE BEST OPTION FOR PAYMENTS UPON CONTRACT AWARD.

H. E-Verify Affirmation Statement



E-VERIFY AFFIRMATION STATEMENT

Solicitation/Bid /Contract No: RFP#380

Project Description:

The City of Fort Lauderdale, Florida is seeking qualified, experienced and licensed firm (s), to provide Infor CloudSuite application support and managed services for the City.

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- A. all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- B. all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: RPI Consultants, LLC

Authorized Company Person's Signature: 

Authorized Company Person's Title: Partner

Date: 11.19.2024

I. Sample Insurance Certificate



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER R.K. Tongue Co., Inc. 4940 Campbell Blvd Suite 200 Nottingham MD 21236		CONTACT NAME: Niccele Winpiger PHONE (A/C, No, Ext): (410) 752-4008 FAX (A/C, No): (410) 752-4611 E-MAIL ADDRESS: mwinpiger@rktongue.com	
INSURED RPI Consultants LLC 1 N Haven St Ste 201 Baltimore MD 21224-1614		INSURER(S) AFFORDING COVERAGE INSURER A: Hartford Underwriters Insurance Co INSURER B: Rated by Multiple Companies INSURER C: Zurich American Insurance Company INSURER D: INSURER E: INSURER F:	
		NAIC # 30104 00914	

COVERAGES		CERTIFICATE NUMBER: CL2461022833		REVISION NUMBER:		
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN/AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			30SBAAT2HRM	07/17/2024	07/17/2025
						EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 BASEP \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> OTHER:			30SBAAT2HRM	07/17/2024	07/17/2025
						COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			30SBAAT2HRM	07/17/2024	07/17/2025
						EACH OCCURRENCE \$ AGGREGATE \$ 3,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	30WECAT20N4	07/17/2024	07/17/2025
						<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 Each Claim 1,000,000 Aggregate 1,000,000
C	Employment Practices Liability			MPL 1197015 - 02	07/17/2024	07/17/2025
						Each Claim 1,000,000 Aggregate 1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)						

CERTIFICATE HOLDER RPI Consultants LLC	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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ACORD 25 (2016/03)

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/10/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER R.K. Tongue Co., Inc. 4940 Campbell Blvd Suite 200 Nottingham MD 21236		CONTACT NAME: Niccele Winpiger PHONE (A/C, No, Ext): (410) 752-4008 FAX (A/C, No): (410) 752-4611 E-MAIL ADDRESS: nwinpiger@rktongue.com	
INSURED RPI Consultants, LLC 1 N Haven St #201 Baltimore MD 21224		INSURER(S) AFFORDING COVERAGE INSURER A: Scottsdale Indemnity Company INSURER B: Travelers Property Casualty Company of America INSURER C: INSURER D: INSURER E: INSURER F:	
		NAIC # 25674	

COVERAGES

CERTIFICATE NUMBER: CL2461022837

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Cyber Liability/Errors & Omissions Claims-Made			ZPL-41N66380-23-I5	07/17/2024	07/17/2025	Each Claim 5,000,000 Aggregate 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Both Primary and Excess coverage are on the above mentioned policy.

CERTIFICATE HOLDER

RPI Consultants LLC

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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J. W-9 for Proposing Firm

Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification Go to www.irs.gov/FormW9 for instructions and the latest information.	Give form to the requester. Do not send to the IRS.														
Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i> , below.																
Print or type. See Specific instructions on page 3.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%; vertical-align: top;"> 1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <u>RPI Consultants, LLC</u> </td> <td style="width: 40%;"></td> </tr> <tr> <td style="vertical-align: top;"> 2 Business name/disregarded entity name, if different from above. </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) <u>C</u> <small>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) </td> <td style="vertical-align: top;"> 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.) </td> </tr> <tr> <td style="vertical-align: top;"> 3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/> </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 5 Address (number, street, and apt. or suite no.). See instructions. <u>111 Haven St, Ste 201</u> </td> <td style="vertical-align: top;"> Requester's name and address (optional) </td> </tr> <tr> <td style="vertical-align: top;"> 6 City, state, and ZIP code <u>Baltimore, MD 21224</u> </td> <td></td> </tr> <tr> <td style="vertical-align: top;"> 7 List account number(s) here (optional) </td> <td></td> </tr> </table>		1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <u>RPI Consultants, LLC</u>		2 Business name/disregarded entity name, if different from above. 		3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) <u>C</u> <small>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>		5 Address (number, street, and apt. or suite no.). See instructions. <u>111 Haven St, Ste 201</u>	Requester's name and address (optional)	6 City, state, and ZIP code <u>Baltimore, MD 21224</u>		7 List account number(s) here (optional)	
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6 City, state, and ZIP code <u>Baltimore, MD 21224</u>																
7 List account number(s) here (optional)																
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"> Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="width: 40%;"> Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div> </td> </tr> </table>			Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div>												
Social security number <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Employer identification number <div style="border: 1px solid black; padding: 2px;"> 37-1480199 </div>															
Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Sign Here</td> <td style="width: 45%;"> Signature of U.S. person <u>Christie Barth</u> </td> <td style="width: 40%;"> Date <u>5/8/24</u> </td> </tr> </table>			Sign Here	Signature of U.S. person <u>Christie Barth</u>	Date <u>5/8/24</u>											
Sign Here	Signature of U.S. person <u>Christie Barth</u>	Date <u>5/8/24</u>														
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 . What's New Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification. New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065). Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they																
Cat. No. 10231X Form W-9 (Rev. 3-2024)																

K. Active Status Page from Division of Corporations – Sunbiz.org

We have provided a copy of our Sunbiz registration on the following pages.

DIVISION OF CORPORATIONS



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Foreign Limited Liability Company
RPI CONSULTANTS, LLC

Filing Information

Document Number M16000005938
FEI/EIN Number 37-1480199
Date Filed 07/25/2016
State MD
Status ACTIVE

Principal Address

1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Changed: 02/06/2023

Mailing Address

1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Changed: 02/06/2023

Registered Agent Name & Address

C T CORPORATION SYSTEM
1200 SOUTH PINE ISLAND ROAD
PLANTATION, FL 33324

Authorized Person(s) Detail

Name & Address

Title Partner

KOWAL, STEPHANIE
1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Title Partner

POLLARD, GREG
1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Title Partner

BRAUN, JUSTIN L
1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Title Managing Partner

WAYLAND, KEITH
1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Title Partner

STOUT, RICHARD L
1 NORTH HAVEN STREET,
STE. 201
BALTIMORE, MD 21224

Annual Reports

Report Year	Filed Date
2022	04/16/2022
2023	02/06/2023
2024	02/14/2024

Document Images

02/14/2024 -- ANNUAL REPORT	View image in PDF format
02/06/2023 -- ANNUAL REPORT	View image in PDF format
04/16/2022 -- ANNUAL REPORT	View image in PDF format
03/31/2021 -- ANNUAL REPORT	View image in PDF format
03/28/2020 -- ANNUAL REPORT	View image in PDF format
04/13/2019 -- ANNUAL REPORT	View image in PDF format
04/19/2018 -- ANNUAL REPORT	View image in PDF format
03/30/2017 -- ANNUAL REPORT	View image in PDF format
07/25/2016 -- Foreign Limited	View image in PDF format

Florida Department of State, Division of Corporations

L. Signing Authority

Note that Richard Leigh Stout, Partner at RPI Consultants has signed the Cover Page of our proposal and is duly authorized to contractually obligate RPI to the project.



STRATEGIC PARTNERSHIP AGREEMENT

AGENDA

1. Introductions
2. Common & Complex Issues
3. Release Impact Management
4. Service Continuity & Quality
5. Issue Prioritization & Resolution
6. Special Projects
7. Issue Escalation
8. Training Support
9. Urgent & After-Hours Support

STRATEGIC PARTNERSHIP - DELIVERING BUSINESS OUTCOMES

REQUIREMENTS	RPI SOLUTION	OUTCOMES
Support Business Users Support application users by quickly resolving their issues, questions and service requests	Business Application Support	Cost-effective, skilled, and integrated support with appropriate coverage
Monitor & Maintain Application Health Manage ongoing system administration, error handling, and application monitoring	Application Administration	Proactive administrative support that frees key resources to focus on business priorities
Manage Cloud Updates Understand update impacts to avoid disruptions and ensure users are aware of changes	Release Management	Advanced evaluation of and preparedness for monthly cloud update impacts
Support & Manage Extensions Maintain existing solution extensions and create enhancements to meet new or different needs	Extension Lifecycle Management	Ongoing function of extensions and ability to adapt quickly to evolving business requirements

COMMON ISSUES

SECURITY



- Understand the need for user(s) to have access to or be secured from an item
- Run securable object report
- Determine the relevant role/security class
- Execute security change(s)

ASync



- Investigate error(s) in question
- Review exception report
- Collaborate with functional team and/or Client SMEs to confirm correct course of action
- Resolve issue and address root cause

REPORTING



- Identify the data not calculating correctly
- Refresh cubes and re-verify data
- If still incorrect, investigate potential replication issues
- Resolve replication issue and validate data calculations

IMPORT ERRORS



- Duplicate transactions result in import errors
- Review input file with Client
- Update / correct import data
- Educate user on preventing future record duplication errors

COMPLEX ISSUES



Client's long-term and short-term disability plans were not calculating correct pay period amounts.



Pre-release Activities

- Review update documentation with Key Users to identify impacts, and determine how to adopt new / changed functionality
- Export and back up personalizations, configurations, and extensions
- Review and adjust job schedules and planned data copies to avoid conflicts with release update window

Post-release Activities

- Verify configurations are still valid
- Verify Async, ION integrations, IPA work units, IDM documents, replication Sets, and ION flows
- Update d/EPM, if needed
- Perform ION Out Queue maintenance
- Perform RICE smoke test to verify operations
- Test IDM configuration updates
- Review known customer impact KB

The following actions are also taken when applicable to the organization and/or the update:

- Review security role changes
- Push out MSCM update packages and verify functionality
- Smoke test desktop tool version changes as installed by Client
- Reset and run new replication sets for Birst, if applicable
- Update ION Connector content
- Review supplementary updates

A team-based approach...



The Right Resources

Clear Responsibilities

Strong Support

Communication

Documentation

Flexibility & Adaptation

Consistent Coverage

ISSUE PRIORITIZATION & RESOLUTION



Priority Alignment

RPI maintains open and frequent communications with the Client to ensure the team is clear on the Client's priorities and provides support services accordingly.



Conflict Identification

The RPI team will proactively identify any conflicts between multiple high priority requests and/or conflicts between requests and the scope of the allocation.



Expectation Setting

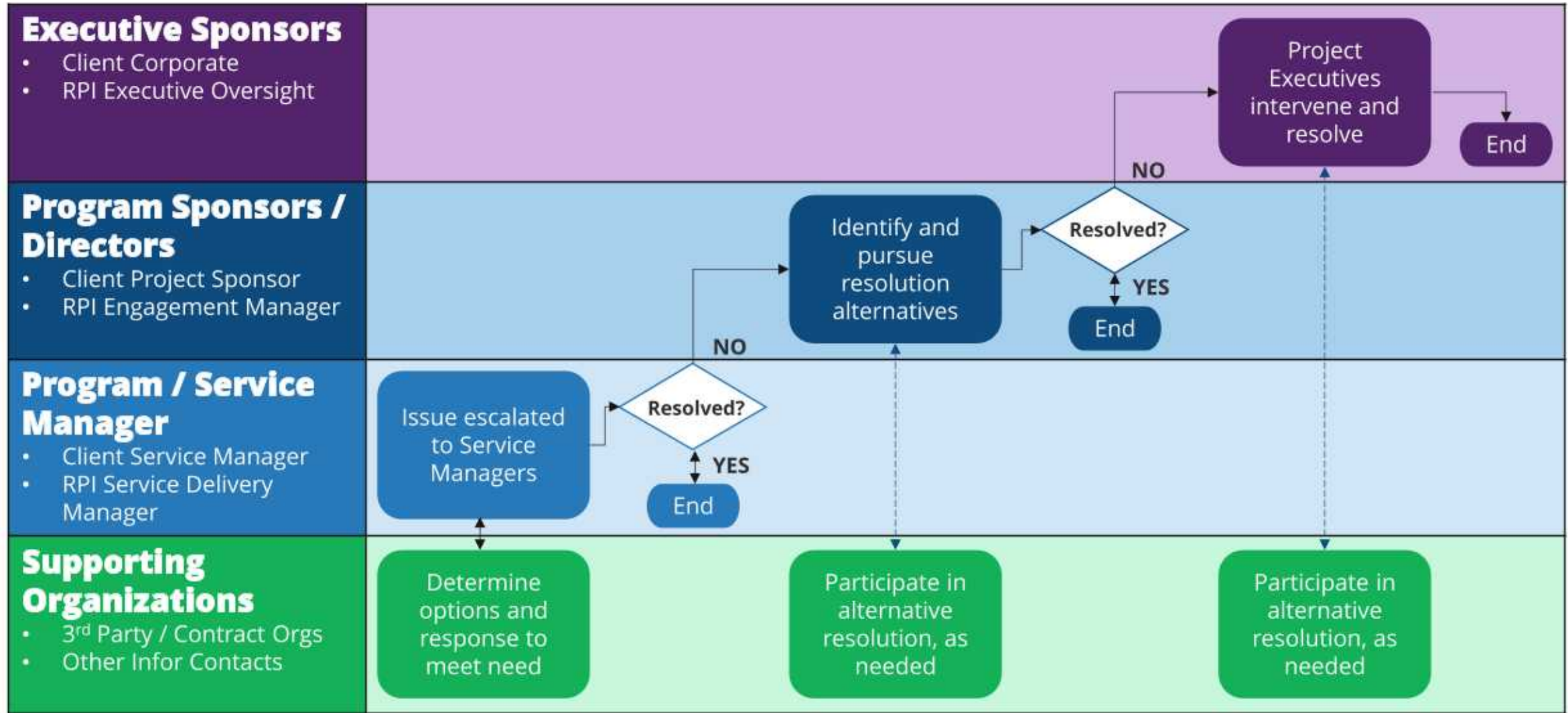
Together, the Client & RPI designees establish and manage expectations related to severity levels, priority conflicts, and consultant / stakeholder responsibilities.



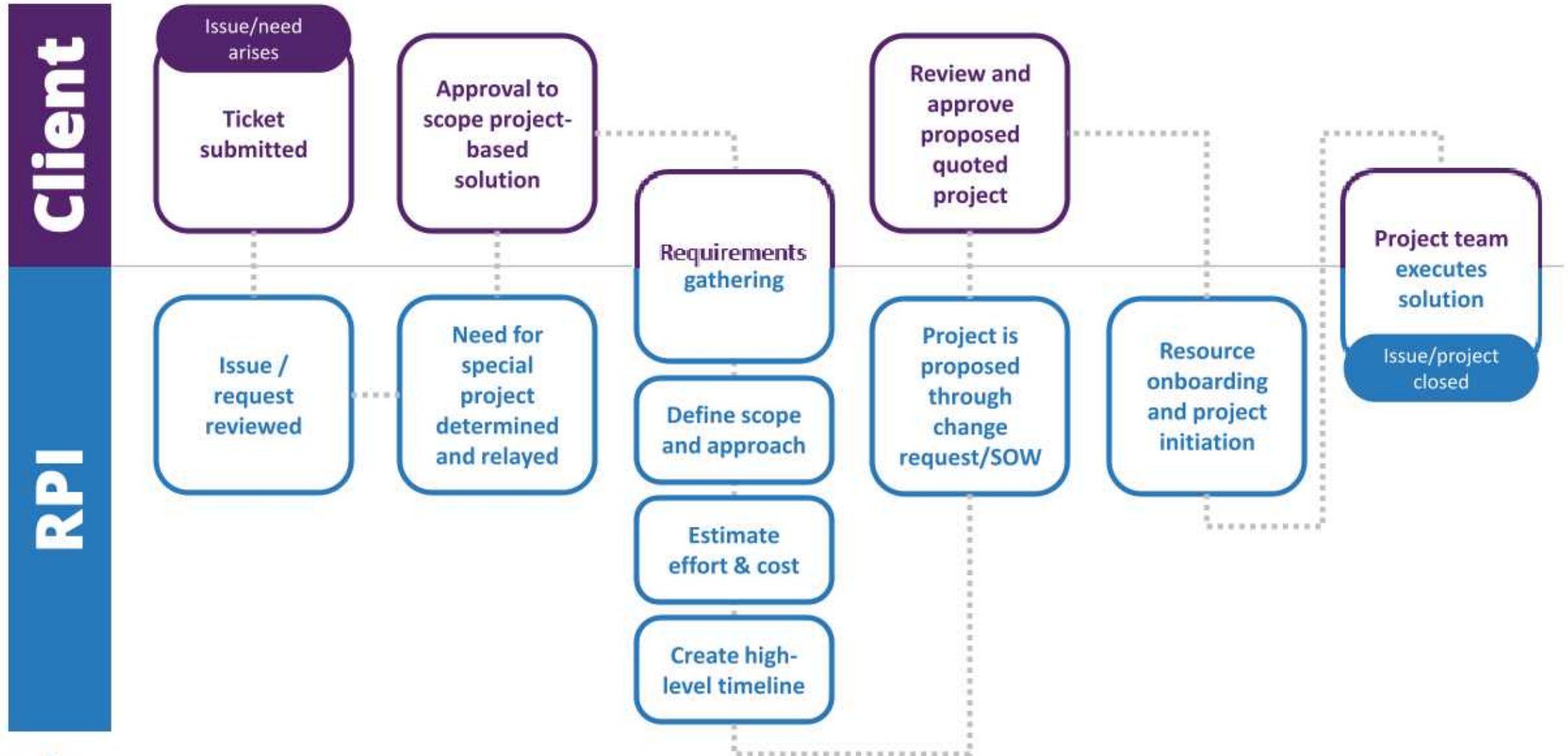
Strategic Planning

Because issues are rarely isolated, RPI leverages regular review sessions to identify trends, recurring root causes, and to ensure the overall service delivery is strategic.

ESCALATION MANAGEMENT



SPECIAL PROJECT LIFECYCLE



TRAINING & ENABLEMENT THROUGH MANAGED SERVICES

As permitted by the engagement allocation and the Client, RPI will...

Find opportunities to **integrate enablement** into issue resolution

Make **training and enablement recommendations** based on observed needs and gaps

Deliver **focused training sessions** as directed by the Client

URGENT & AFTER-HOURS SUPPORT



No Additional Fees

There are no surcharges, higher rates or additional fees for providing necessary support outside of business hours



Enhanced Support Plan

Managed services becomes integrated with your existing support plan and feels like an extension of your team



Proactive Approach

Proactive management of activities that may require special support mitigates risk and preventable issue escalation

Any questions please feel free to contact:

Evan Winebarger

770-853-7796 or ewinebarger@rpics.com



THANK YOU!

380 - Infor CloudSuite Managed Services – Additional Questions

1. Upon approval by commission and final execution of the contract by both parties, explain how your firm will steer the initial information gathering, needs assessment and understanding of business processes for this contract?

RPI will set up a kick-off session with the City to establish Managed Services for the Infor CloudSuite Tenants. RPI will document the processes that will govern the services throughout the life of the engagement. The kick-off session is used to initiate the CloudSuite Managed Services program and conduct the planning required to complete the Governance Plan and Standard Operating Procedures document.

The Governance Plan defines the processes governing the support services delivery for this engagement at the operational, program and strategic levels. The plan will describe the roles and responsibilities for both the RPI and Client service teams, communication plan including details around status meetings and reporting, issue and risk management including escalations, scope of the engagement captured in the client environment definition and project services and the service change management process.

The Standard Operating Procedures (SOP) documents how an authorized system/application user works with the RPI team to request services or report incidents; describes the approach to orient team personnel on established and new managed services procedures and policies; proactive maintenance and administration duties to be performed including release impact management processes; and explains the systematic process and tools for receiving, distributing, tracking reporting, and closing incidents and service requests.

- a. How will you assess the city's current open issues to determine the best solutions?
An assessment could be conducted as a special project that would occur when initiating the managed services engagement.
- b. Is this assessment a prerequisite performed as part of the onboarding, or are those hours taken from the 25 weekly service hours?
Current state assessments are not a standard part of the new client onboarding process for managed services. Assessment services would either need to be a part of the 25-hour allocation or be handled as a special project.
- c. Clarify your plan(s) and expectation(s) for the 30-day, 90-day and 1-year marks.
At the 30-day mark, client will be fully onboarded to the managed services engagement, governance plan, meeting cadence, SOP, and regular reporting will be established. If Client chooses to engage in an initial special project assessment, that process would be well underway at 30 days and fully complete with follow-up actions ongoing at 90 days. At the 3-month mark, we expect all high priority issues identified at project outset have been resolved or resolution is in progress (dependent upon client decision-making and approvals). Operations are being stabilized. One year of support will have resulted in a considerable decrease in the number of tickets being

submitted for end user error and enablement-type needs. Operations have stabilized and the organization is able to focus on optimization opportunities and goals.

2. How many other clients are assigned to the same project team members that will be servicing us?

RPI maintains a flexible and dynamic resourcing model which allows us to tap available individuals to resolve client issues or requests based on aligning the right expertise and experience with the need. Our managed services partners are not limited to a fixed set of consultants with a static portfolio of clients at the expense of providing efficient high-quality services.

3. How many resources will be dedicated to the City of Fort Lauderdale for this engagement?

The City will have a dedicated Service Delivery Manager. As described above, RPI W2 consultants will be assigned to support the City based on the nature of its needs and aligning resources based on their ability to efficiently and effectively meet those needs.

4. Do you have a dedicated person working on each special project?

Special projects are staffed on the nature of the work and the required expertise and experience. The dedicated individual across all Ft. Lauderdale special projects and managed services would be your Service Delivery Manager, maintaining consistency and oversight across the various activities occurring within your managed services agreement.

5. Provide the number of employees employed by your organization and how many are dedicated to Infor CloudSuite v11, Multi-tenant Managed Services.

RPI currently employs more than 75 functional and technical consultants, all of whom are experienced with Multi-tenant Infor CloudSuite v11. We have been working with CloudSuite since 2018 and are proud to boast one of the highest, if not *the* highest, certification percentage among Infor partners with more than 120 certifications held across the organization.

- a. Do you outsource to a third-party vendor or use consultants to support your client?

We do not outsource to third-parties or use contracted consultants to support managed services engagements/clients.

6. With regards to special projects, what is your firm's standard payment structure?

RPI engages in special projects on a time and materials basis according to resource level and rate card. Invoices are issued on a monthly basis for special project services provided during the preceding month or to staff our project teams.

- a. Should your team be unable to resolve an issue, will there still be a charge?

Yes. RPI is committed to building long-term trusted partnerships with our clients and we follow a philosophy of "billing for value". Some tickets may have limited resolution options that the client is not interested in pursuing. Other tickets may represent a need that can only be addressed by the software developer (Infor). Our clients value having RPI as a partner who can help them understand their options, including identifying when the only near-term recourse is an Infor Enhancement Request (ER). In those cases, RPI goes the extra mile to promote the endorsement of the (ER) to not only benefit our clients but also the larger Infor user community.

- b. Should a project require more resources than originally quoted to meet the agreed upon schedule, do you bring on additional resources at no additional charge to fulfill the request?

No, not in typical circumstances. A quote is our informed best estimate of the work effort required to achieve a given project's objectives and there are a variety of factors that impact adherence to the predetermined schedule, some of which are outside of RPI's control. We manage projects to schedule very proactively and transparently, and we communicate with clients regularly on the status of project work. We will collaborate with you to build consensus around the best approach if there is an indication that the project resourcing will be incompatible with meeting the projected timeline.

7. How do you allocate the money and 25 hours? Can we use 100 hours in a week and then be out for the next 3 weeks?

During onboarding, we will work with you to finalize an approach to the hours allocation that balances the meeting of CoFTL's needs and the practical administrative considerations.

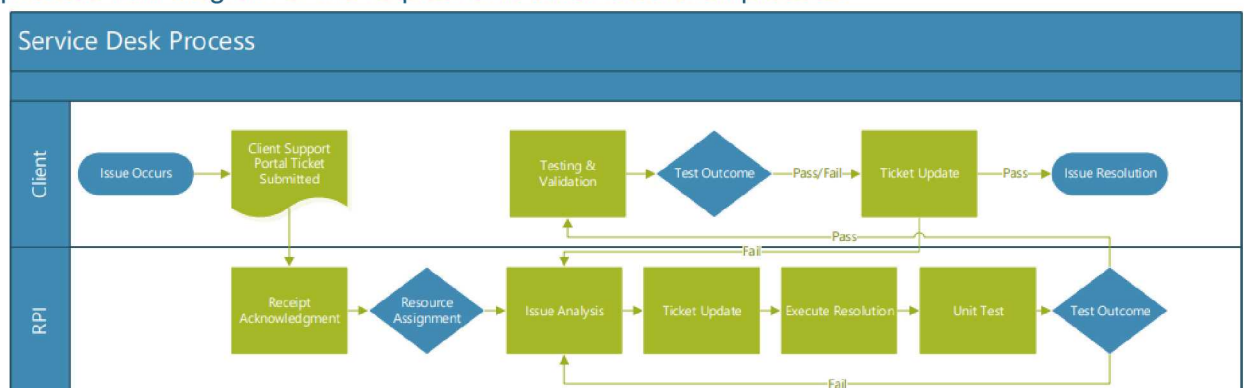
8. How do you determine what becomes a special project or a managed service request? RPI uses an effort estimate of 40 hours or more as a general guideline for designating a Service Hub request as a special project. Other factors, such as complexity, team resourcing, and estimated duration may be used in designating an initiative as a special project. When RPI receives an issue or request that the team believes will be best addressed through a special project, we will notify the City point of contact and discuss as needed to get buy-in before proceeding with the detailed estimation, scoping, and documentation required to initiate and allocate resources to the special project.
9. Provide examples of Absence Management projects/audits/automations you have recently done?

Please see the RPI Absence Management samples table provided.

- a. What were the challenges and how were they resolved?
- b. Provide the names of the jurisdictions that you worked with on the Absence Management projects?

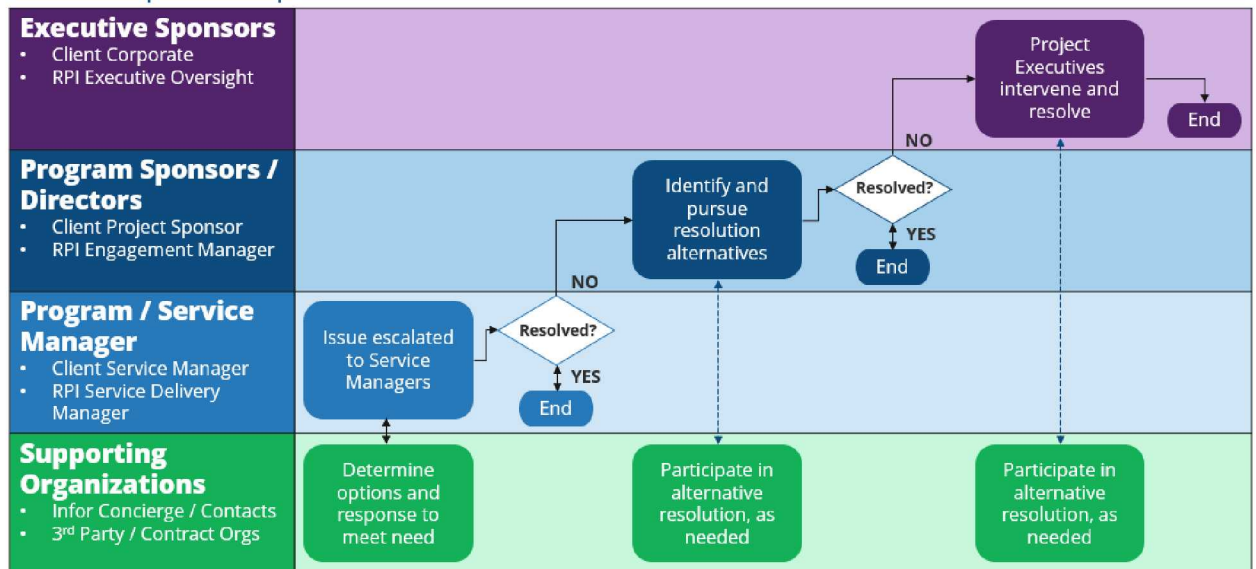
10. How do you handle service requests and support tickets?

RPI provides support for Business Application issues, inquiries, and on-demand service requests through Service Hub, our incident management system. Please see below for a process flow diagram of the request and ticket resolution process.



11. What reporting tools will be in place to keep us informed of project status?
RPI's ticketing platform Hubspot provides the data and supports reporting. Clients have access to a Service Hub dashboard which shows tickets by status and includes information such as creation date and last activity. Monthly status reports are created by the RPI Service Delivery Manager and distributed by email.
12. Are you open to using the city's SharePoint for document management?
Yes, RPI can use the city's SharePoint for document management.
13. Provide a process flow diagram showing how your Managed Services will interact with Infor Concierge Services? Our ticketing system is divided into two parts today; Entry at ServiceNow ITSM and Infor Concierge Support Services, please identify your role in the future and the relationship between CoFTL, Infor Concierge Support Services, and your organization.

Infor Concierge is a part of the "Supporting Organizations" swim lane in the diagram below. As part of onboarding, access to the city's Infor Concierge will be requested for specific RPI team members in order to act on the city's behalf, work directly with Infor if required by the issue, and/or advocate directly with Infor for timely resolution of issues that are dependent upon Infor intervention.



RPI organizes Service Desk Support into three levels:

- Level One: CoFTL responsibility defined as initial triage. Interacting with End Users to understand the issue or request prior to being escalated to RPI. This ensures all the necessary information is submitted when the ticket is opened with RPI, reinforces the single point of contact at the city, and helps avoid the creation of unnecessary tickets.
 - Level Two: RPI provides functional and/or technical support for issue resolution.
 - Level Three: RPI engages senior or principal resources to support issue resolution.
- Depending on the nature of the issue, the expert consultant may determine that escalation to include Infor Concierge is needed. Whether the ticket is submitted by the client, or by the RPI resource on the client's behalf, both the CoFTL Service Manager and RPI consultant should have access and visibility to the ticket status and associated communications. RPI will lead the management of the Infor ticket, advocating for the

client (including escalating with Infor, if needed) and directing client resource participation in the resolution of the issue as appropriate/required to reach resolution.

14. Describe your services to train Business End Users with the varied Infor CloudSuite modules and the method to deliver training.

It is not uncommon for RPI to receive tickets that have been submitted as a result of end user knowledge or proficiency gaps. We know that this has been a struggle for Fort Lauderdale where resource limitations may only allow for clearing individual issues as quickly as possible and conducting the kind of end user enablement that will help prevent recurrences of the issue(s) is not necessarily feasible.

RPI's training services are extremely flexible and can be adapted to meet the needs of any client. As discussed during our presentation, there are three primary ways that we deliver training and enablement to our managed services clients:

-For "lighter" training needs, we try to integrate enablement for individual end users into the resolution of their issue/ticket whenever possible and appropriate. This may include sharing a job aid, recommending a webinar/existing video tutorial, or walking them through the resolution steps.

-We can identify trends over time, whether that is specific to an individual or a particular topic, and recommend targeted training services. That might look like a hands-on working session or a workshop.

RPI Absence Management Samples

Customer Assessment	Absence Management
Columbus Regional Assessment of CloudSuite HCM, PR, and WFM	RPI determined Absence Management was being maintained in both WFM and HCM. Found that HCM and WFM were not communicating correctly for FMLA and Balances and advised on how to correct it. Advised CRH on best practices for maintaining absence within WFM and keeping it the source of truth.
City of Greensboro Assessment of CloudSuite HCM, FSM, PR	<p>The City went live on CloudSuite 6 months prior to this assessment. The team was not responsible for Absence administration in S3 so RPI recommended and performed different training courses for the client.</p> <p>RPI also uncovered issues with their holiday leave to sick leave conversion and provided a break-fix as well as a go forward path for year end.</p>
Cumberland County, PA Infor CloudSuite Preplanning HCM, FSM, PR	RPI assessed CCPA's use of Absence Management in their current state. CCPA was running Kronos and Infor Absence Management and keeping Kronos as the system of truth. RPI

	<p>helped draft a future state for CCPA's move to Infor CloudSuite and how Absence Management will be used in both systems.</p> <p>RPI is currently implementing Infor CloudSuite for CCPA based on the preplanning assessment.</p>
Hospital in Midwest Assessment of Infor CloudSuite FSM, HCM, PR, WFM	<p>Assessed Infor CloudSuite system and the build that was partially completed. This client currently uses Infor to manage Absence Management and had pain points with the transfer of information from the Time & Attendance system. RPI evaluated current set up and API's being used and made recommendations on how to best address issues.</p>
Infor CloudSuite HCM Implementations w/ Absence Management	<p>RPI has led a significant amount of Infor CloudSuite projects that included Absence Management implementation from scratch or migrated from a legacy system.</p> <p>Some implementations include Town of Apex, NC, County of Bucks, PA, Cumberland County, PA, San Gabriel Valley Water.</p>

Table 1 - RPI References - Working with Our Customers to Achieve Success

Reference	Racine Unified School District – Racine, Wisconsin
Project Scope	<ul style="list-style-type: none"> RPI assessed the following suites: Finance, Human Capital Management / Payroll, Supply Management/Procurement, and technology/tools/automation with the goal of optimizing current Infor Lawson software usage. The assessment had the following objectives which were fully met and/or exceeded by the RPI project team: Review of Infor Lawson Applications and Related Processes Finance, including General Ledger (GL), Activity Management (AC), Accounts Payable (AP), Accounts Receivable (AR), Grant Management (GM), Cash Ledger (CB) Human Capital Management, including Human Resources (HR), Payroll (PR), Absence Management (LP) Supply Management, including Purchase Order (PO), Inventory Control (IC), Requisitions (RQ), Requisition Center (RQC), Warehouse (WH) Additional Infor Lawson assessment priorities and outcomes:

	<ul style="list-style-type: none"> • Evaluate the potential impact/use of Infor Lawson P-Card functionality. • Evaluate the existing Kronos to Infor Lawson integration. Determine if new integrations or possible configuration adjustments are recommended. • Provide an estimate for the implementation of Infor Lawson Personnel Action Workflows. • Provide an estimate for updates to the existing Purchase Approval Workflow. • Provide an estimate for a Resource Request and Assignment Approval through the possible use of Infor Process Automation and developed forms. • Evaluate the use of d/EPM and/or other Budgeting solutions. • Provide an estimate for the implementation of Infor Lawson Contract Management / Strategic Sourcing.
Project Deliverables	<ul style="list-style-type: none"> • Business Case Overview • Project Plan • Communication Plan • Kick Off Presentation • On-Site Agenda(s) • Quick Wins • Top Observations • Full Observations • Recommendations • Roadmap • Executive Summary