REQUEST FOR PROPOSALS

Enterprise Resource Planning (ERP) System

Lacey Fire District 3

RFP Issue Date	September 1, 2026
Proposal Due Date / Time	October 16, 2026, at 2:00pm Pacific Time
District Contact	Brandon Kirkwood Chief Financial Officer 360-528-2310 rfp@laceyfire.com
Anticipated Award	January 22, 2027

1. Introduction

Lacey Fire District 3 ("District") is seeking proposals from qualified vendors to provide, implement, train, and support a cloud-based Enterprise Resource Planning (ERP) solution.

The District currently utilizes Tyler ERP Pro 10 as its primary enterprise resource planning system. The District is seeking to replace the existing ERP environment with a modern cloud-based solution.

The District currently serves a growing community of over 110,000 people within Thurston County, Washington and operates with a 2026 annual budget of approximately $50 million, with projected growth to approximately $70 million over the next five years. The District currently employs approximately 193 personnel and anticipates growth to potentially as many as 250 employees in the next few years.

The District seeks a modern, cloud-based ERP platform that will support financial management, human resources, payroll, procurement, project accounting, contract management, analytics, workflow automation, and future technology initiatives including artificial intelligence and advanced reporting.

The District intends to select a long-term technology partner and ERP platform capable of supporting the District for an expected lifecycle of at least 10 years, with the potential to remain the District's primary ERP platform for 20 years or more.

2. RFP Administration and Procurement Process

The District intends to conduct this procurement as a competitive negotiation for electronic data processing software and related services pursuant to RCW 39.04.270 and the District's applicable procurement policies.

The District intends to evaluate proposals using the best-value methodology described in this RFP. Award will not necessarily be made to the lowest-priced proposal. The District intends to select the qualified proposer whose proposal is most advantageous to the District after considering price and the other evaluation factors identified in this RFP.

2.1 Anticipated Procurement Schedule

Milestone	Date
RFP Issued	September 1, 2026
Pre-Proposal Conference	September 10, 2026
Deadline for Written Questions	September 18, 2026
District Responses / Addendum	September 25, 2026
Final addendum/last substantive clarification	October 2, 2026
Proposal Due Date and Time	October 16, 2026 at 2:00pm Pacific Time
Administrative responsiveness review	October 19-23, 2026
Initial Proposal Evaluation/Reference Checks	October 26-30, 2026
Finalist Notification	November 2, 2026
Finalist Demonstrations / Interviews	November 9-20, 2026
Notice of Intent to Award	December 21, 2026
Contract Negotiations	January 4-8, 2027
Board Approval	January 21, 2027
Anticipated Contract Award Date	January 22, 2027
Contract Execution	February 1, 2027
Anticipated Implementation Start	February 1, 2027

Go-Live Date	January 1, 2028

2.2 Communications and Questions

- All questions concerning this RFP shall be submitted in writing to the District's designated contact.
- Restricted communication period: From the RFP issue date through execution of the resulting contract, all substantive communications regarding this solicitation shall be directed to the District's designated contact. This restriction does not prohibit attendance at public meetings or communications concerning matters unrelated to this procurement.
- Proposers shall not contact District staff, Board members, or other representatives concerning this procurement except through the designated contact during the restricted communication period established by the District.
- The District will provide responses to material questions through a written addendum or other method specified in the final solicitation.
- Only written addenda issued by the District shall modify the RFP requirements.
- **Pre-Proposal Conference: September 10, 2026 at 8:30am Pacific Time** via Microsoft Teams. Attendance is encouraged, but not mandatory. Instructions for participation will be posted on the District's ERP RFP Webpage.

2.3 District Rights

- Reject any or all proposals for good cause.
- Request clarification or additional information.
- Conduct interviews, demonstrations, reference checks, and negotiations.
- Request revised or best-and-final proposals if permitted and deemed appropriate.
- Waive minor informalities or irregularities when legally permissible.
- Cancel, amend, or reissue the RFP when in the District's best interest and as permitted by law.
- Award the contract based upon the evaluation process and criteria described in this RFP.

2.4 Public Records

Proposers shall clearly identify each portion of a proposal for which an exemption from disclosure is claimed and shall identify the specific statutory basis for the claimed exemption. The District does not guarantee that information identified by a proposer as proprietary or exempt will be withheld from disclosure. The District will determine disclosure in accordance with applicable law and is not responsible for representations made by a proposer concerning the confidentiality or exempt status of information.

2.5 Proposal Validity

Proposals shall remain valid for a minimum of 180 days following the proposal due date unless otherwise specified by the District.

3. Project Objectives

The District seeks an ERP solution that will:

- Improve operational efficiency.
- Modernize human resources and payroll operations.
- Enhance financial reporting and transparency.
- Reduce manual processes and spreadsheet dependency.
- Improve employee self-service capabilities.
- Support future organizational growth.
- Provide robust reporting and analytics.
- Leverage cloud architecture and emerging technologies.
- Provide strong cybersecurity, privacy, business continuity, and audit capabilities.
- Provide a long-term technology platform with an expected lifecycle of 10–20 years.

4. Organizational Information

Lacey Fire District 3 was formed in 1949. The current boundaries include the Nisqually River to the East, the City of Olympia to the West, Fire District 8 to the North and Fire District 6 and Joint Base Lewis-McChord to the South. The District is the exclusive service provider to the City of Lacey and the Nisqually Indian Reservation. These boundaries encompass about 70 square miles.

The District protects an assessed valuation of more than $22.8 billion, which includes a mix of residential and commercial occupancies as well as agricultural and undeveloped wildland. The District holds a Class 3 rating from the Washington Survey and Rating Bureau throughout most of the District area.

Services are provided throughout the District from five 24-hour staffed stations strategically located throughout the community. Additionally, the District provides paramedic services throughout the southeast portion of the County from a facility in the City of Yelm.

4.1 District Organizational Culture

The District operates under a defined cultural framework known as “The LFD3 Way.” This framework establishes the expectations for how personnel perform their duties, interact with one another, and serve the community. It is foundational to the District’s identity and directly informs how projects are planned, executed, and delivered.

LFD3 Way

- **Mission**

  Service with Excellence

- **Vision**

  To be trusted professionals in our community and experts in our field who specialize in emergency preparedness, prevention, and response.

- **Values**

The LFD3 Way is grounded in the following core values:

Competence – To effectively handle whatever challenge we face

Character – To preserve our integrity and the public's trust

Courage – To do what is right, regardless of difficulty or circumstance

Compassion – To treat all individuals with respect and without prejudice

Camaraderie – To support, respect, and rely on one another as a team

❖ **Guiding Principles**

- Teamwork is what sustains us. Nothing important is accomplished alone and no one succeeds in isolation.
- Leadership is a commitment and mindset, not a title or position. Our leaders are accessible and accountable, guiding in a trustworthy and disciplined manner with clearly defined expectations that are predictably consistent and fair.
- Decisions we make must stand up under inevitable scrutiny; could you confidently read about it in the newspaper?
  - If there is a policy, follow it; if it doesn't match best practices then say something.
  - If there's not a policy but a known past or best practice exists, rely on it.
  - If there's no policy or practice to follow, and you have discretionary time, then seek the guidance of your peers or leaders; THEN take a lead role in developing the needed policy or guide.
  - If there's no policy, practice, or discretionary time, use your training and experience to make the best decision you can; THEN share your experience so the next person will have a guide to follow.
- Life-long learning is what prepares us for our future. Every day MUST BE a Learning Day and shall be conducted as if lives depend on its success, because they do.
- Mistakes are inevitable. Without them, we would never learn the wrong way to do something. Just don't waste the experience by hiding or repeating a mistake.

5. Scope of Work

The proposed ERP solution shall include, at minimum, the following required functional areas.

5.1 Required Modules / Functional Areas

- General Ledger and Financial Management
- Budget Development and Budget Management
- Accounts Payable
- Accounts Receivable
- Cash Management and Bank Reconciliation
- Purchasing and Procurement
- Contract Management
- Project Accounting
- Human Resources
- Payroll
- Position Control
- Employee Self-Service

- Recruiting and Onboarding
- Workflow and Business Process Automation
- Reporting and Analytics
- Security and RBAC
- Document and Records Management

5.2 Optional / Future Modules

- Learning Management
- Performance Management
- Advanced Recruiting / Talent Management
- AI-Assisted Analytics
- Predictive Forecasting
- Fixed Assets
- Advanced Contract Lifecycle Management

6. Cloud, Hosting, and Platform Requirements

The District strongly prefers a cloud-native SaaS solution. Vendors shall clearly distinguish between true multi-tenant SaaS, hosted/on-premises software, and other deployment models.

- Hosting architecture and cloud service provider(s).
- Data-center locations and geographic redundancy.
- Security certifications and independent attestations.
- Disaster recovery and business continuity capabilities.
- Data ownership and portability provisions.
- Upgrade methodology and customer testing opportunities.
- System availability guarantees and historical uptime.
- Mobile functionality.
- Browser and device requirements.
- Sandbox/test environment availability.
- Production versus non-production environment strategy.
- Release management and advance customer notification.

7. Finance and Accounting Requirements

The District requires compliance with applicable accounting standards and Washington State Budgeting, Accounting and Reporting System (BARS) accounting principles.

7.1 Washington State and District Accounting

- Cash-basis accounting structure requirements.
- Washington State BARS account coding.
- Washington State Auditor’s Office annual report requirements.
- Fund accounting and multiple funds.
- Fund-to-fund transfers and interfund transactions.

- Budgetary control and legal level of budgetary control.
- Restricted, committed, assigned, and unassigned fund-balance tracking as applicable.
- Year-end closing and reopening of fiscal years.
- Prior-period adjustments with appropriate audit trails.
- Strict internal controls and transactional validation capabilities.

7.2 Core Finance

- General Ledger.
- Accounts Payable.
- Accounts Receivable.
- Cash receipts and deposits.
- Bank reconciliation.
- Electronic payments and ACH.
- Vendor management.
- 1099 processing.
- Duplicate invoice detection.
- Invoice approval workflows.
- Encumbrance and commitment accounting.
- Audit trails for financial transactions.
- Recurring and reversing journal entries.
- Budget-to-actual reporting.
- Financial statement and management reporting.

Vendors shall identify which capabilities are native, configurable without programming, dependent on third-party products, custom-developed, or planned for future release.

8. Budgeting Requirements

- Personnel budgeting.
- Operational budgeting.
- Capital budgeting.
- Multi-year budget planning.
- Multiple budget scenarios and what-if analysis.
- Budget collaboration with District division and department leaders.
- Executive-level budget review and approval.
- Budget amendment workflows.
- Multi-year revenue and expenditure forecasting.
- Salary and benefit forecasting.
- Vacancy and turnover assumptions.
- Capital project forecasting.
- Budget-to-actual reporting.
- Digital budget book.
- Board-level budget reporting.

9. Purchasing and Procurement Requirements

- Purchase requisitions.
- Approval routing based on dollar amount, department, fund, account, or other criteria.
- Purchase orders.
- Three-way matching where applicable.
- Vendor management.
- Electronic invoice processing.
- Procurement history and search.
- Encumbrance integration with Finance.
- Purchasing card support.
- Bid/quote documentation.
- Blanket and recurring purchase orders.
- Receiving.
- Invoice exceptions and workflow.
- Procurement reporting.

10. Contract Management Requirements

- Contract approval paths.
- Contract type organization.
- Legal review step in contract approval business process.
- Contract start and end dates.
- Contract amounts and budget tracking.
- Contract amendments.
- Invoice tracking.
- Contract document management.
- GL account compliance and application.
- Contract integration with vendor and customer accounts.
- Electronic signatures, including integration with Adobe Sign or equivalent.
- Renewal and expiration notifications.
- Searchable contract repository.
- Contract performance and obligation tracking.

11. Project Accounting Requirements

- Project creation and coding.
- Project budgets.
- Project commitments and actual expenditures.
- Integration with the General Ledger.
- Capital project accounting.
- Grant-funded project tracking where applicable.
- Project status reporting.
- Project closeout.

- Project document management.
- Multi-year project tracking.

12. Human Resources Requirements

The District places significant emphasis on modern, employee-centered HR functionality.

- Employee lifecycle management.
- Recruiting / applicant tracking.
- Digital onboarding.
- Digital offboarding.
- Leave management.
- Position management.
- Performance management.
- Personnel record management.
- Electronic personnel documents.
- Employee self-service.
- Manager self-service.
- Organizational charting.
- Workforce planning.
- Compensation management.
- Job and classification management.
- Certification and license tracking.
- Training record integration.
- Employee history and audit trail.
- Workflow for employee changes.
- Confidential personnel information controls.

13. Position Control Requirements

- Position creation and approval.
- Budgeted versus filled position status.
- FTE and position allocation.
- Department and division assignment.
- Funding source / fund assignment.
- Salary range and step information.
- Bargaining unit assignment.
- Position history.
- Vacancy tracking.
- Position-to-budget integration.
- Position-to-payroll integration.
- Approval workflow for new positions and changes.
- Position reporting and organizational charts.

14. Payroll Requirements

As a fire agency, the District has a complex payroll structure. Vendors shall demonstrate the ability to accurately calculate the District's current compensation structure and payroll processes.

- Current payroll timeline: paid monthly on the 10th with a 40% draw on the 25th in the month prior.
- Five-Step Pay Schedule.
- Longevity Pay.
- Education Incentive Pay.
- Technical Certification Pay.
- HRA/VEBA calculation based on family type and medical benefits.
- Deferred Compensation based on percentage of top-step Firefighter for represented staff or percentage of total salary for non-represented staff.
- Leave cashouts at retirement.
- Overtime and other premium pay calculations.
- Callback, minimum-call, special-assignment, and other premium-pay rules where applicable.
- Out-of-class, acting, temporary-assignment, and other differential-pay rules where applicable.
- Holiday, vacation, sick leave, and compensatory-time treatment.
- Retroactive pay and rate changes.
- Multiple collective bargaining agreements and bargaining-unit-specific compensation and leave rules.
- Effective-dated labor agreement provisions and future-dated compensation changes.
- Ability for authorized District personnel to configure and maintain applicable wage schedules, step progression, premium-pay rules, leave provisions, and other compensation rules without custom programming.
- Ability to implement negotiated wage increases and other compensation changes and automatically identify affected employees and payroll periods.
- Ability to calculate and process retroactive compensation resulting from negotiated changes, including applicable overtime and premium-pay impacts.
- Ability to model or forecast the financial impact of proposed compensation changes before implementation, where available.
- Historical retention of prior compensation and labor-agreement rules for audit, reconciliation, and reporting purposes.
- Multiple pay rates and earnings codes.
- Payroll adjustments with audit trail.
- Automated tax and benefit calculations.
- Washington State Paid Family and Medical Leave and WA Cares requirements.
- Quarterly and annual payroll reporting.
- W-2 and other year-end forms.
- Payroll reconciliation to General Ledger.
- Direct deposit and electronic pay statements.
- Wage garnishments.
- Child support
- Tax levies
- Applicable Washington retirement systems
- Employer retirement contributions

- Payroll tax filing
- Payroll tax reconciliation
- Amended payroll filings
- Off-cycle payroll
- Void/reissue checks or payments
- Final pay

Vendors shall identify any payroll functionality that requires third-party products, custom programming, manual intervention, or additional licensing.

14.1 Time & Attendance Requirements

The District utilizes time entry for payroll processing for both Operational and Administrative personnel.

- Time entry.
- Time approval.
- Overtime.
- Leave.
- Compensatory time.
- Multiple time codes.
- Supervisor approvals.
- Delegation.
- Corrections.
- Audit trail.
- Integration with payroll.
- Integration with Vector Scheduling/CrewSense

15. Benefits Requirements

- Integration with benefit providers.
- Open enrollment.
- Employee self-service.
- Compensatory time accrual.
- Custom leave types.
- Medical, dental, vision, life, disability, and other benefit plans as applicable.
- Employee and employer contribution calculations.
- Family-tier eligibility and contribution rules.
- HRA/VEBA administration or integration.
- Deferred compensation deductions.
- Retirement deductions and employer contributions.
- Qualifying life events.
- Benefit eligibility rules.
- Carrier interfaces.
- Benefit deduction reconciliation.
- Employee and employer benefit reporting.

16. Employee and Manager Self-Service Requirements

- Update personal information.
- Change address.
- Change banking/direct deposit.
- Update tax withholding / W-4.
- Add or remove dependents.
- Enroll in and change benefits.
- View pay statements.
- Access W-2 and other tax forms.
- View leave balances and requests.
- Submit time and attendance information.
- Submit employee changes subject to approval.
- Access District documents.
- Manager approval workflows.
- Manager access to appropriate team information.

17. Reporting, Analytics, and Business Intelligence

The District places significant emphasis on intuitive reporting capabilities that can be used by finance, HR, payroll, operational managers, executives, and other authorized end users without routine vendor assistance.

- Custom/ad hoc reporting by end users.
- Dashboard development.
- Budget reporting.
- Financial statements.
- HR analytics.
- Payroll reporting.
- Contract reporting.
- Position and vacancy reporting.
- Overtime analysis.
- Board-level reporting.
- Drill-down from summary information to source transactions.
- Export to Excel and other common formats.
- Scheduled report distribution.
- RBAC reporting security.
- Report versioning and governance.
- AI-assisted reporting capabilities.

Finalists shall demonstrate the creation of an ad hoc report without vendor assistance. The demonstration shall identify the number of steps required, whether programming or technical assistance is required, and whether the demonstrated functionality is included in the proposed subscription.

18. Workflow and Business Process Automation

- Configurable approval workflows.
- Conditional routing.
- Dollar-threshold routing.
- Department/fund/account-based routing.
- Delegation and substitution.
- Electronic notifications.
- Escalation and reminders.
- Workflow audit trails.
- No-code/low-code configuration where available.
- User-accessible workflow administration.
- Customizable workflow and transactional validation capabilities.

19. System Integration Services

Vendors shall describe the proposed integration architecture, tools, APIs, middleware, integration monitoring, error handling, and ongoing maintenance responsibilities.

- API integration.
- Integration or time import with Vector Scheduling (formerly CrewSense) for District Represented Employee Time Scheduling.
- Integration with Operative IQ for District Asset and Supply Management.
- Integration with Vector Solutions/Target Solutions for Training/Certification Management.
- Compatibility with Microsoft 365, including SharePoint.
- Banking and financial institution integrations.
- Benefit provider integrations.
- Electronic signature integration, including Adobe Acrobat Sign or equivalent.
- Identity provider / SSO integration.
- Ability to add future integrations without major platform redevelopment.

20. Data Conversion, Data Ownership, and Data Portability

- Detailed data-conversion methodology.
- Inventory of historical data proposed for conversion.
- Employee and HR history conversion.
- Payroll history conversion.
- Financial history conversion.
- Vendor and customer history conversion.
- Purchase orders and procurement history.
- Contracts and associated documents.
- Fixed assets.
- Audit history where technically feasible.
- Data validation and reconciliation.
- Multiple conversion/test cycles.

- District ownership of all District data.
- Ability to export District data in commonly usable, machine-readable formats.
- Data export upon request and upon contract termination.
- Reasonable transition assistance at termination.

Vendors shall identify all limitations on historical data conversion and all additional costs associated with conversion, archival, or future data extraction.

21. System Security, Privacy, and Compliance

- Document and records management.
- Robust multi-factor authentication (MFA).
- Role-Based Access Control (RBAC).
- Single Sign-On (SSO).
- Optical Character Recognition (OCR), where applicable.
- Conditional access policies.
- Comprehensive audit logs.
- Encryption at rest and in transit.
- Security incident response.
- Vulnerability management.
- Independent security assessments and certifications.
- SOC 1 Type II and/or SOC 2 Type II reporting, where applicable.
- Penetration testing.
- Subprocessor management.
- Data retention and secure deletion.
- Security breach notification procedures.
- Cybersecurity insurance coverage.

Vendors shall disclose known security incidents materially affecting the proposed service during the prior five years, subject to applicable legal and confidentiality restrictions.

22. Accessibility and User Experience

- Compliance with applicable accessibility requirements.
- Compliance with WCAG 2.1 Level AA and other applicable federal and state accessibility requirements.
- Keyboard navigation.
- Screen-reader compatibility.
- Accessible employee self-service.
- Accessible reporting and documents.
- Mobile accessibility.

23. Disaster Recovery, Business Continuity, and Availability

- System uptime guarantees.
- Support response guarantees.
- Disaster recovery objectives.
- Recovery Time Objective (RTO).
- Recovery Point Objective (RPO).
- Backup frequency.
- Geographic redundancy.
- Backup immutability where available.
- Frequency and results of disaster recovery testing.
- Business continuity plan.
- Service restoration procedures.
- Customer communications during major outages.

24. Artificial Intelligence and Emerging Technology

The District intends to select an ERP platform that can adapt to emerging technologies, including artificial intelligence, over the expected 10–20 year lifecycle.

- Current generally available AI capabilities.
- AI-assisted reporting and analytics.
- Natural-language query capabilities.
- Forecasting and predictive analytics.
- Payroll or financial anomaly detection.
- Contract summarization and analysis.
- Workflow recommendations.
- AI-assisted employee and manager self-service.
- Human approval requirements for AI-generated or AI-initiated transactions.
- AI auditability and activity logging.
- Vendor AI roadmap.
- Distinction between generally available, beta, planned, and conceptual functionality.
- Whether District data is used to train vendor AI models.
- Whether District data is shared with third-party AI providers.
- Data retention and security controls applicable to AI features.

25. Implementation Services

- Detailed implementation methodology.
- Project governance structure and timeline.
- Named implementation team and roles.
- Data conversion approach.
- Configuration approach.
- Integration development and testing.
- Training plan.

- Change management support.
- Testing plan.
- User acceptance testing.
- Go-live readiness criteria.
- Go-live support plan.
- Post-implementation stabilization support.
- Knowledge transfer methodology.
- Risk register and mitigation plan.
- District responsibilities and expected internal staffing commitment.
- Vendor assumptions and dependencies.

25.1 Implementation Acceptance

- Defined deliverables.
- Acceptance criteria.
- UAT completion.
- Payroll validation.
- Financial reconciliation.
- Data conversion validation.
- Integration testing.
- Security testing.
- Training completion.
- Go-live readiness.
- Post-go-live stabilization.
- Formal District acceptance.

Implementation payments shall be tied to measurable milestones and acceptance.

25.2 Implementation Cost and Schedule Control

Vendors shall clearly identify which implementation costs are fixed, which are estimated, which are time-and-materials, and which assumptions could cause additional charges. Vendors shall identify all material dependencies that could affect the implementation schedule or cost.

Vendors shall provide a proposed implementation schedule from contract execution through production go-live and stabilization.

Vendors shall provide a proposed payment schedule tied to the following milestones:

- Contract execution.
- Design/configuration completion.
- Data conversion completion.
- System/integration testing.
- UAT.
- Go-live.
- Post go-live stabilization/final acceptance

26. Vendor Experience, Financial Stability and Long-Term Viability

- Public-sector references.
- Fire district references.
- Special district references.
- Washington State references.
- Customer retention statistics.
- Average customer tenure.
- Number of active public-sector customers.
- Number of active fire district customers.
- Number of active special district customers.
- Support model description.

The District seeks to establish a long-term relationship with the selected ERP provider and therefore requires sufficient information to assess the vendor's financial stability and ability to support the proposed solution throughout the 10-20 -year lifecycle.

26.1 Financial Stability

Vendors shall provide sufficient information for the District to evaluate the financial stability and long-term viability of the organization providing the proposed ERP solution. Vendors shall identify:

- Years the vendor has been in business.
- Ownership structure and parent company, if applicable.
- Whether the vendor is publicly or privately held.
- Number of customers currently using the proposed ERP solution.
- Number of employees supporting the proposed ERP solution.
- Any merger, acquisition, divestiture, bankruptcy, or material restructuring during the previous five years.
- Any planned or anticipated ownership or corporate changes that could materially affect the proposed solution or services.
- The vendor's strategy for continued investment, development, and support of the proposed ERP solution over the next ten years.
- Any other information the vendor believes demonstrates its ability to provide long-term support for the proposed solution.

Publicly held vendors may satisfy this requirement through publicly available financial reports or SEC filings. Privately held vendors may provide equivalent information or other evidence of financial stability. The District may request additional information during the evaluation process when reasonably necessary to assess vendor responsibility and long-term viability.

27. Vendor Support and Customer Success

The District views long-term vendor partnership, customer support, and customer success services as critical components of this procurement. Vendors shall provide detailed responses to the following requirements.

27.1 Customer Support Model

- Standard customer support hours.
- Emergency support availability.
- Support channels available (phone, email, portal, chat).
- Escalation procedures.
- Issue prioritization methodology.
- Average response times by severity level.
- Average resolution times by severity level.
- Service Level Agreements (SLAs).
- Standard support versus additional paid support.
- Level of recommended internal application administration and product expertise.
- Support staffing model and geographic coverage.
- Process for recurring or systemic defects.
- Named escalation contacts for critical or unresolved issues, including executive-level escalation when an issue remains unresolved beyond the applicable SLA.

27.2 Customer Success Program

- Dedicated account management structure.
- Customer Success Manager assignment process.
- Executive sponsorship programs.
- Business review meeting frequency.
- Product roadmap communication processes.
- User community participation opportunities.
- Customer advisory board opportunities.

27.3 Implementation and Post-Go-Live Support

- Project management methodology.
- Change management support.
- End-user training programs.
- Administrator training programs.
- Post-go-live stabilization support.
- Knowledge transfer methodology.
- Ongoing optimization services.

27.4 Product Enhancement and Innovation

- Product roadmap for the next three years.
- Artificial Intelligence (AI) strategy and planned enhancements.
- Upgrade frequency.
- Customer influence on future product development.
- Historical examples of customer-requested enhancements.
- Process for submitting and tracking enhancement requests.

27.5 Customer Satisfaction Metrics

- Customer retention rates.
- Net Promoter Score (NPS), if available.
- Customer satisfaction survey results.
- Average customer tenure.
- Customer implementation success metrics, if available.

27.6 References

Vendors shall provide a minimum of five public-sector references, including at least two Washington State customers and at least one customer that is comparable in organizational size, complexity, or public-safety/special-district environment. At least two references shall have completed implementation within the last five years.

References shall include organization name, contact person, title, email address, telephone number, modules implemented, and go-live date.

27.7 Customer Reference Interviews

The District may independently contact references and may ask questions regarding implementation, support responsiveness, product reliability, reporting, HR/payroll functionality, vendor responsiveness, contract administration, and whether the customer would select the vendor again.

27.8 Service Level Commitments

- System uptime guarantees.
- Support response guarantees.
- Disaster recovery objectives.
- Recovery Time Objectives (RTO).
- Recovery Point Objectives (RPO).
- Service credits or other contractual remedies for failure to meet material service commitments.

28. Demonstration Requirements

Finalists will be required to demonstrate the proposed solution using realistic District scenarios. The District intends to provide finalists with substantially identical demonstration instructions and may impose time limits.

Vendors shall identify for each demonstrated capability whether it is Native, Configurable, Third Party, Custom, a Workaround, or Future Roadmap functionality. Vendors shall not represent future functionality as currently available.

28.1 Demonstration Rules

- The demonstration shall use a production-equivalent environment.
- Vendor personnel may not perform steps that a normal District end user or administrator would be expected to perform unless the vendor clearly identifies that dependency.
- Pre-built demonstrations may be used where requested, but the District may require live configuration or report creation.

- The District may interrupt the demonstration to ask how a feature works, how it is configured, or what additional licensing is required.
- The District may request a second demonstration of high-priority requirements.

28.2 Required Scenarios

Finance Scenario

Demonstrate BARS-oriented account structure, fund accounting, journal entry and approval, budget-to-actual, interfund transfer, bank reconciliation, period close, audit trail, and drill-down.

Annual Budget Development Scenario

Build a department budget, include salary/benefit assumptions, create multi-year forecast, route approval, process amendment, and produce Board-ready report.

HR / Position Scenario

Request a new position, approve the position, recruit for the position, hire a firefighter, onboard the new hire (assign bargaining unit, enroll benefits, establish payroll), process a promotion including title and compensation changes (including step increases and technician pay), and process separation.

Payroll Scenario

Process representative monthly payroll and 40% draw, including overtime, longevity, education incentive, certification pay, HRA/VEBA, deferred compensation, retirement cashout, and benefits.

Payroll Reconciliation Scenario

Show pre-payroll audit, approval, GL posting, bank reconciliation, benefit reconciliation, quarterly reporting, and W-2.

Purchasing Scenario

Create a requisition, route approvals, issue a purchase order, process a purchase order change request, receive goods/services, process an invoice, create payment, purchase card management, search prior procurements, and create a 1099.

Contract Lifecycle Scenario

Create contract, department/finance/legal approvals, electronic signature, spend tracking, amendment, and renewal/expiration alerts.

Project Accounting Scenario

Create capital project, establish budget, record commitments/actuals, forecast-to-complete, report status, and close.

Employee Self-Service Scenario

Demonstrate employee experience in updating benefits (including deferred compensation amounts), changing address, changing personal information, changing banking, updating W-4 information, adding dependents, requesting leave, and accessing a W-2.

Ad Hoc Reporting Scenario

Build live report of employees hired during a District-selected period with budgeted GL accounts, compensation, department, position, bargaining unit, and other fields.

Time & Attendance Scenario

Demonstrate employee experience for time entry, time approvals, delegations for time entry and time approvals, leave requests, and how the time entry flows into the payroll process.

Executive Dashboard Scenario

Show budget-to-actual, vacancies, overtime, contract expirations, and capital projects with drill-down.

AI Scenario

Demonstrate production AI relevant to finance, HR, payroll, reporting, forecasting, contracts, or workflow; distinguish production, beta, planned, and conceptual.

Administration/Security Scenario

Create a user, assign roles for the user, SSO/MFA integration, demonstrate user access based upon role, demonstrate internal control transactional validation by role, update user access, approvals for user creation and edits, audit logs, deactivation of user and security reporting.

Integration/API

Demonstrate API documentation, representative integration, error handling, monitoring, and future integration approach.

29. Proposal Submission Requirements

Proposals shall be organized in the following order so that the District can evaluate responses consistently.

1. Cover Letter and Executive Summary.
2. Vendor Organization and Qualifications.
3. Proposed ERP Solution Overview.
4. Detailed Functional Response.
5. Requirements Response Matrix.
6. Implementation Methodology and Schedule.
7. Data Conversion Plan.
8. Integration Plan.
9. Security, Privacy, and Business Continuity Response.
10. Vendor Support and Customer Success Response.
11. AI and Technology Roadmap.
12. References.
13. Exceptions and Assumptions.
14. Cost Proposal.
15. Other Information Requested by the District.

Vendors shall clearly identify all assumptions, exceptions, exclusions, required third-party products, custom development, additional licensing, and future roadmap dependencies.

Proposals shall be submitted electronically through rfp@laceyfire.com and must be received no later than **2:00 pm Pacific Time on October 16, 2026.**

Proposals received after the deadline may be rejected as late and will be handled in accordance with applicable law and District procurement requirements.

Proposers are responsible for ensuring that their proposals are successfully received by the District prior to the deadline.

Proposal Format requirements:

1. Written narratives shall be submitted in PDF format
2. Requirements matrix shall be submitted in MS Excel format
3. Cost Proposal format shall be submitted in MS Excel format
4. Include name of vendor in the file naming
5. Electronic signatures are acceptable
6. 150MB maximum file size in email submission
7. If a proposal exceeds the 150 MB email attachment limit, the Proposer shall provide a secure download link that is accessible to the District at the proposal deadline and remains accessible for at least 30 days thereafter. The Proposer is responsible for ensuring that the District can access all submitted materials.

Vendors will receive an acknowledgment of receipt when the District receives the full submittal.

30. Cost Proposal

Vendors shall submit a detailed pricing schedule sufficient for the District to calculate the total cost of ownership over at least ten years.

30.1 Required Pricing Categories

- Software licensing/subscription.
- Implementation services.
- Data conversion.
- Training.
- Integration development.
- Third-party products and services.
- Annual support costs.
- Optional module pricing.
- Additional environments / sandboxes.
- Additional users or employee growth.
- Additional storage or transaction fees.
- Travel and reimbursable expenses.
- Other recurring or non-recurring charges.

30.2 Total Cost of Ownership

Vendors shall provide a five-year total cost of ownership and a ten-year cost projection using the District's current and projected employee counts. Vendors shall clearly state all assumptions concerning subscription escalation, user growth, inflation, transaction volume, storage, and optional modules.

Vendors shall identify the maximum annual subscription escalation permitted under the proposed agreement and any circumstances that could cause subscription costs to increase beyond the stated escalation.

30.3 Implementation Cost

Vendors shall distinguish fixed-fee implementation services from time-and-materials services and identify assumptions that could result in additional implementation charges.

31. Evaluation and Selection Process

The District intends to award based on best value. The District will use documented technical evaluation procedures and the significant evaluation factors and relative weights below, subject to any modifications communicated through an addendum.

Evaluation Area	Weight
Functional Fit	25%
HR and Payroll Functionality	20%
Reporting and Analytics	15%
Implementation Approach	10%
Vendor Support and Customer Success	15%
Future Technology and AI Roadmap	5%
Total Cost of Ownership	10%
Total	**100%**

31.1 Evaluation Components

- Written proposal and requirements matrix.
- Technical and functional evaluation.
- Finalist demonstrations.
- Implementation approach and risk assessment.
- Vendor support and customer success evaluation.
- Customer reference checks.
- Cost and total cost of ownership.
- Contract terms and negotiations.

The District will document the evaluation process and retain evaluation materials consistent with applicable public-records, audit, and records-retention requirements.

Finalist demonstrations will be used primarily to evaluate Functional Fit, HR and Payroll Functionality, Reporting and Analytics, and Future Technology and AI Roadmap.

Customer reference checks will be used primarily to inform the evaluation of Vendor Support and Customer Success, Implementation Approach, and the overall risk associated with the proposed vendor and solution.

The District reserves the right to conduct interviews, demonstrations, reference checks, and contract negotiations prior to final award. The District may request clarifications, additional information, or revised proposals as permitted by applicable law and the RFP.

32. Contract Requirements

The final contract will be subject to District review and approval and shall include terms appropriate to a long-term cloud ERP relationship.

- Contract term and renewal options.
- Subscription pricing and escalation limitations.
- Service level commitments.
- Data ownership and portability.
- Termination for cause and, if permitted, convenience.
- Transition and data-export assistance upon termination.
- Confidentiality and public-records requirements.
- Security and privacy obligations.
- Insurance requirements.
- Indemnification.
- Intellectual property.
- Limitation of liability.
- Subcontractor requirements.
- Change control.
- Service credits or other remedies.
- Business continuity and disaster recovery.
- Applicable Washington law and venue.
- Audit and records requirements.

The District may provide a proposed form of agreement with the final solicitation. Proposers shall identify any material exceptions to the District's proposed contract terms.

33. Requirements Response Standards

To facilitate an objective comparison of proposals, vendors shall use the following response classifications for each detailed requirement.

Response	Meaning	Vendor Response	Additional Cost / Notes
N	Native	Function is included in the proposed solution without custom development.	
C	Configurable	Function is available through standard configuration by District/vendor administrators without custom programming.	
T	Third Party	Function requires a separate third-party product or service.	
X	Custom	Function requires custom programming or material custom development.	
W	Workaround	Requirement can be met only through a manual or	

		materially different workaround.	
R	Roadmap	Function is not currently available but is planned or committed for future release.	
NA	Not Available	Function is not available in the proposed solution.	

For every response other than Native or Configurable, the vendor shall identify the applicable product, implementation effort, recurring and non-recurring costs, limitations, dependencies, and expected availability date where applicable.

34. Anticipated RFP Attachments

- Attachment A – Detailed ERP Requirements Matrix.
- Attachment B – Vendor Cost Proposal Form and Vendor Certification
- Attachment C – Demonstration Script and Scenario Instructions.
- Attachment D – Evaluation Scorecard.
- Attachment E – Sample District Contract / Contract Terms.
- Attachment F – Vendor Reference Questionnaire.

The District may issue additional attachments or addenda as necessary before the proposal deadline.

END OF DOCUMENT