



Request for Proposals

ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE

RELEASE DATE

OCTOBER 6, 2023

PROPOSALS DUE

November 10, 2023

Contact:

Patrick Lee, Finance Manager/Treasurer
Florin Resource Conservation District
9829 Waterman Road
Elk Grove, CA 95624

Proposals must be sent electronically via email to:

Patrick Lee at
plee@egwd.org

Table of Contents

1. PURPOSE	3
2. BACKGROUND	3
3. ERP SYSTEM SCOPE	4
4. RFP RESPONSE FORMAT	4
5. EVALUATION CRITERIA	5
6. SCHEDULE	5
7. RFP FOR ERP SOFTWARE TERMS AND CONDITIONS	6
Exhibit A – Key Requirements & Pricing Estimates	
Exhibit B – Customer References	

1. Purpose

The Florin Resource Conservation District (District) is requesting proposals from qualified firms for a new Enterprise Resource Planning system to encompass Financials, Utility Billing, Enterprise Asset Management, and Human Resources/Payroll. Responding firms shall be solely responsible for any expenses incurred in preparing proposals in response to this request.

Due Date and Time: November 10, 2023, at 4:00 PM Pacific Time

Proposals submitted after the due date and time will not be considered.

Questions regarding this Request for Proposal can be submitted via email to Patrick Lee, Finance Manager/Treasurer, Florin Resource Conservation District at plee@eqwd.org with the subject title: **FRCD ERP Software RFP Questions**.

RFP Questions Due Date and Time: October 25, 2023, at 5:00 PM Pacific Time

The District will respond directly to any questions that are emailed to Patrick Lee on or before October 25, 2023.

Public Disclosure Notice

To protect the integrity of the contracting process, proposals will not be disclosed until after the award and signing of any and all contracts that may result from this Request for Proposal. All responses to this RFP will become the property of the District. Once a final award is made, all responses, including financial and proprietary information, become a matter of public record, and shall be regarded by the District as such. The District shall not in any way be liable or responsible for the disclosure of any such records or portions thereof if the disclosure is made pursuant to a public records request.

2. Background

The Florin Resource Conservation District was formed in 1953, pursuant to Section 9000 *et seq.* of the Public Resources Code of the State of California (the "Conservation District Law"). The District is located approximately six miles southeast of the City of Sacramento in the southern portion of unincorporated Sacramento County and encompasses approximately 151 square miles and provides water service to more than 13,500 residential and commercial connections through approximately 145 miles of water mains through its Water System Utility, known as the "Elk Grove Water District" (EGWD), which is a department within the District.

The Finance Department is responsible for many aspects of District operations, including Accounts Payable, Accounts Receivable, Cash Management, Payroll, Investments, Financial Reporting, Budgeting, Procurement, and Utility Billing. Currently, the Finance Department consists of the Finance Manager, Finance Supervisor, Senior Utility Billing Specialist, and three Utility Billing Specialists.

The current financial software package used by the District is Sage 100 ERP, which is used for cash management, bank reconciliations, accounts receivable, accounts payable, and general ledger. Separate software packages are used for payroll and human resource functions (Sage HRMS Suite), utility billing (TruePoint Solutions), and enterprise asset management (Cityworks).

The District's Operating and Capital Improvement Project Budgets are currently prepared and tracked in Microsoft Excel.

3. ERP System Scope

The District would like to select and implement a more integrated solution to fill the functional and operational needs of the District. The scope of ERP software for this project includes the following areas of functionality:

Functionality	
General Ledger	Fixed Assets
Budgeting	Accounts Payable
Accounts Receivable	Enterprise Asset Management
Backflow Prevention	Purchasing
Utility Billing	Human Resources
Timekeeping/Payroll	Reporting

Detailed technical and functional requirements are in Exhibit A – Key Requirements & Pricing Estimates.

4. RFP Response Format

The District uses a qualifications-based selection process. The District is open to a single ERP solution for all modules or partner solutions that encompass the breadth of the required Functionality. Proposals shall be concise. Software applications that are missing a significant number of required features and technology preferences may be eliminated from consideration.

Responses to this RFP must adhere to the submittal format described below with the information as identified in the following table. **Section 3 – Key Requirements and Pricing Estimates must be submitted in MS Word format.**

SECTION	TITLE	INFORMATION TO BE INCLUDED
Section 1	Cover Letter	Provide a signed Cover Letter. The letter shall be signed by an officer authorized to bind the firm and shall include the name, address, and phone number of the person(s) to contact who will be authorized to represent the firm.
Section 2	Company Background	Provide company background and experience. Please limit this to no more than 2 pages.
Section 3	Key Requirements & Pricing Estimates	Complete Exhibit A - Key Requirements & Pricing Estimates. Must be provided in MS Word format.
Section 4	Customer References	Complete Exhibit B - Customer References.
Section 5	Implementation Methodology	Provide a brief overview of your implementation project team and methodology and the expected timeframe for this project. Please limit this to no more than 2 pages.

Please send one (1) electronic copy of the proposal as stated above via email to plee@egwd.org. **All proposal materials must be received by the District by 4:00 PM on November 10, 2023.** Late proposals or modifications to a proposal after the proposal submittal deadline will not be accepted by the District.

5. Evaluation Criteria

An ERP Selection Committee comprised of selected District staff will evaluate the proposals with a focus on the strength and quality of the proposal. The District will make the final determination of the selected vendor. The District has engaged SoftResources LLC to support the evaluation process.

The District and SoftResources may request additional information, conduct clarifying conference calls, or take any other action it deems necessary in order to review and clarify submitted information for the District evaluation team. In addition, the District will require a short list of finalist vendors to conduct a scripted product demonstration for its selection team.

Factors that will contribute to the decision of the selected vendor include but are not limited to:

- Project approach and understanding of the District's objectives and requirements
- Ability to meet the District's requirements (software functionality, usability, performance, flexibility, integration, and technology)
- Vendor's install base and proven experience with similar customers
- Feedback from customer references
- Vendor's implementation methodology and history of success
- The implementation timeframe
- Ongoing support
- Pricing based on 5-year total cost of ownership

6. Schedule

The evaluation and contract schedule is as follows:

ACTION ITEM	DATE(S)
Issue Request for Proposals	October 6, 2023
Questions Due	October 25, 2023
Proposals due by 4:00 pm	November 10, 2023
Short List Notifications	December 2023
Conduct Demos	December 2023 – January 2024
Select Vendor	January – February 2024
Complete Contract Negotiations	February – March 2024
Board of Directors Award of Contract, if necessary	February – March 2024
Execute Contract and Notice to Proceed	February – March 2024

7. RFP for ERP Software Terms and Conditions

- A. Submission of a proposal will signify the Vendor's agreement that the proposal, and contents thereof, are valid for ninety (90) days following the submission of the proposal and shall become part of the contract that is negotiated with the successful vendor.
- B. Submission of a proposal shall constitute Vendor's agreement to the terms of the proposal and any and all addenda issued by the District.
- C. A proposer may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. District personnel will not merge, collate, or assemble proposal materials.
- D. It is the Vendor's sole responsibility to ensure that proposals are received by the District prior to the scheduled closing time specified in this Request for Proposal (RFP). Proposals will not be accepted after the deadline.
- E. The District may reject any or all proposals for any reason or for no reason, and waive irregularities, informalities, and requirements in the submittal and evaluation process. The District may modify, amend, cancel, postpone, or reissue the RFP at any time and for any reason.
- F. Failure by the District to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any Agreement awarded pursuant to the RFP.
- G. The RFP does not obligate the District to accept or contract for any services.
- H. This RFP does not obligate the District to pay any costs incurred by respondents in the preparation and submission of a proposal, including but not limited to a respondent doing a scripted product demonstration.
- I. The District may accept the proposal(s) or parts of a proposal deemed most advantageous to the District.
- J. The District may obtain clarification of any point in the submitted proposal. Such clarifications can be in any form such as but not limited to conference calls, email communications, web demonstrations, onsite demonstrations, or headquarters visits.
- K. The District may share the RFP, proposals, and subsequent provided information with its consultant(s) to secure expert opinion.
- L. Materials submitted to the District shall become the property of the District, will not be returned to the proposer, and will become public information upon the District's receipt. Submittals and all documents shall not be marked confidential, trade secret or any similarly asserted grounds to resist public disclosure.
- M. The District shall have the right to make alterations, eliminations, and additions to the work. Exercise of such right shall in no way void the contract. The District and the Vendor shall agree upon the value of such extra work.

- N. The District reserves the right to negotiate with the selected vendor regarding terms and conditions and pricing before the final contract is signed.
- O. The RFP, proposal, and all documents incorporated by reference in a contract entered into between the Vendor and the District, and all modifications of said documents, shall be construed together as one document.

A handwritten signature in blue ink, appearing to read "B. M. Kamilos".

Bruce Kamilos, P.E.
GENERAL MANAGER

Exhibit A – Key Requirements & Pricing Estimates

This document is provided under separate cover. It is not a comprehensive list of all the District's requirements but includes the key requirements that will be used to evaluate the proposals and will be incorporated into the signed contracts.

For each item a ranking has been provided indicating the importance to the District. Rankings include **R for Required, I for Important, N for Nice to Have, or E for Explore**. Software applications that are missing a significant number of required features and technology preferences may be eliminated from consideration.

Vendors must **provide a rating and a comment for every item**. The comment should include a **brief explanation** of how the item is supported. Do not provide hyperlinks within the document. Do not reference another line item for your answer. **Do not provide an answer that is longer than 2 sentences.** All items must be addressed within the box provided. **Do not modify the format, font, numbering, etc. of this section or insert page breaks.** If a submitted RFP includes blank responses the document may be considered incomplete and rejected. Use the following rating system to evaluate each requirement:

Y	Fully supported by the current release of the software.
3P	Supported with third party software (software not directly owned or controlled by the vendor submitting the proposal).
C	Customization is required to meet the requirement (changes to the underlying code must be made, a report must be specifically developed, tables have to be created or modified, etc.).
F	Future functionality on the product roadmap and supported in the next release of the software (or releases) within the next 1 – 2 years.
N	Not supported.

Sample Response Format: Please use the format below when completing your response.

	General	Rating and Comment
R	1.Audit trail with user, date, and time stamp throughout all modules.	Y System logs all transactions and stamps them with user, date, time and before/after values. A report can be generated to review audit history.

Exhibit B – Customer References

Provide three references that are similar in size and scope to Florin Resource Conservation District, and that have implemented the proposed software in the past five years. References should be fully implemented and live on the current version of the software.

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

Background

Florin Resource Conservation District (District) is the parent organization of Elk Grove Water District that supplies Water services to approximately 13,500 customer accounts in the Elk Grove, California area. They also perform water resource planning and management, and have 2 water treatment plants. The District is replacing their current systems including Sage 100 (ERP), Sage HRMS (HR/Payroll), TruePoint Solutions (Utility Billing), SwiftComply (Backflow), and Cityworks (EAM).

District Facts and Figures:

Number of Employees	30
Geographic Size	151 Square Miles
Number of Water Treatment Facilities	2
Number of Customers	Approximately 13,500 accounts
Asset Types	6
Assets Tracked	6,600
Annual Total Number of Service/Work Orders	Approximately 15,000
Backflow Inspections Managed Annually	Approximately 900
Annual Operating Budget	Approximately \$15 million
Current Financial System	Sage 100
Current HR/Payroll System	Sage HRMS
Current EAM System	Cityworks
Current Backflow System	SwiftComply
Current Utility Billing System	TruePoint Solutions

The District is replacing the current systems with an integrated enterprise solution that would encompass much, if not all of the functionality outlined in this document. The goals of this project are to:

- **Modernize technology both internally and with utility customers**
- **Utilize a single source of data as much as possible**
- **Reduce the number of best of breed solutions**
- **Enhance both internal and external access to data**
- **Improve internal processes**
- **Reduce customizations, work arounds, manual processes, and off system data**
- **Unify workflow and processes wherever possible**

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

Vendor Information	
Contact Information	Vendor Response
Company name	
Contact: name, title, phone, email	
Company website	
Company Information	Vendor Response
Year founded	
Parent company (if separate)	
Software vendor(s) represented (if a reseller)	
Company genealogy (name changes, acquisitions, mergers...)	
Revenue	
Vendor Employees	Vendor Response
Number of employees	
Number of employees dedicated to proposed software	
Vendor Customer Information	Vendor Response
Total customers	
Total in California	
Number of water district customers	
List sample customers similar to Florin	
Implementation model: Specify direct or partner	
Deployment Model	Vendor Response
Discuss your SaaS strategy – (Multi-tenant or single tenant/hosted)	
Describe the upgrade process	
Estimated On-Premises/Hosted Cost	Vendor Response
Provide an overview of your pricing methodology for on-premises implementation. (Per user and total cost as well as basis for cost.)	
Software license, 30 users (30 employees + 5 board members).	
Software implementation.	
Software maintenance.	
Other (e.g., 3 rd Parties, Required Hardware, etc.).	
Total first year.	
Total 5 years.	
Discuss hosting options and additional cost for hosting services.	
Estimated Cloud/SaaS Cost	Vendor Response
Provide an overview of your pricing methodology for SaaS implementation. (Per user and total cost as well as basis for cost.)	
Annual subscription 30 users (30 employees + 5 board members). Please provide per user and total cost, as well as basis for cost.	
Software implementation.	
Other (e.g. 3 rd parties, required hardware, etc.).	
Total first year.	
Total 5 years.	

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

	Functional Requirements	3 rd Party
	Modules/General Functionality	Identify if 3 rd Party solution is required for functionality
R	1. General Ledger	
R	2. Fixed Assets	
R	3. Budgeting	
R	4. Accounts Payable	
R	5. Accounts Receivable	
R	6. Asset Management	
I	7. Backflow Prevention	
R	8. Purchasing	
R	9. Utility Billing	
R	10. Human Resources	
R	11. Timekeeping/Payroll	
R	12. Reporting	
	Technology	Vendor Response
R	13. On-premises or cloud deployment. Describe if software-as-a-service or hosted environment.	
R	14. If on-premises, list server/platforms supported (Windows/Linux).	
R	15. If on-premises, list databases supported.	
I	16. User interface (list web browsers supported).	
R	17. Documented disaster recovery plans.	
I	18. Microsoft Active Directory for single sign-on.	
R	19. Bi-directional import/export to Office 365 (Excel, Word, Outlook).	
R	20. User and role-based security.	
I	21. End user configurable menus and screens.	
R	22. User defined fields fully searchable and included in all reporting functionality.	
R	23. List standard system tools used for interfacing/integrating to other systems (e.g., web services, APIs, etc.).	
R	24. Major systems for interface, integration or replacement:	
	A. DataProse (Utility Bill Printing or replace)	
	B. Twilio (IVR/Notifications or replace)	
	C. ESRI ArcGIS (Geographical Information System)	
	D. Cityworks (EAM – replace)	
	E. SwiftComply (Backflow – replace)	
	F. Kennedy Jenks (Long Term Asset Replacement Planning)	
	G. Alfresco (Content Management)	
	H. Duo (Multi-Factor Authentication)	
I	25. Mobile device strategy and support, including handhelds, tablets, and scanners. List supported devices.	
	General Requirements	Vendor Response
R	26. User definable rules-based electronic workflow routing with triggers, alerts and 2-way capability.	
R	27. Customer web portal functionality – describe.	
R	28. Ability to drill down from GL and reporting to view source transactions and documentation.	
R	29. Attach documents to transactions.	

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

R	30. Wild card searches and queries throughout all modules.	
R	31. Audit trail with date, time, user stamp and historical values.	
R	General Ledger	Vendor Response
R	32. Describe chart of account structure; support for a 13-digit account code with 4 segments.	
R	33. Journal entry – up to 50 lines on a JE.	
R	34. Attach documents to journal entry.	
R	35. Bulk upload journal entry from Excel.	
R	36. Journal entry workflow approval process.	
R	37. Project accounting (track labor and material cost – 10-15 capital projects).	
R	38. Project Accounting – budget to actual tracking – projects cross fiscal years.	
I	39. Grant Accounting – Future grant accounting functionality.	
R	40. Support annual comprehensive financial report development.	
N	41. Basic investment/treasury functions.	
R	Fixed Assets	Vendor Response
R	42. Fixed Assets - 6,600 capitalized assets – straight line depreciation.	
R	43. Fixed Assets - Capital projects (CIP) convert to fixed asset.	
R	44. Fixed Assets – useful life by asset class (could be 125 years for distribution main).	
R	45. Support nested assets (assets within assets).	
R	Budgeting	Vendor Response
R	46. Department annual budgets – top-down budgeting process.	
R	47. Budget templates preloaded with previous year's budget.	
R	48. Workflow based budgeting process to departments with adjustments/approvals.	
R	49. Project budgets that cross fiscal years.	
R	50. Mid-year budget adjustments.	
R	51. Monthly budget to actual reporting with configurable alerts/warning.	
R	52. Support revenue and expense forecasting.	
R	Accounts Payable	Vendor Response
R	53. 2-way match (PO, Invoice).	
R	54. Workflow invoice approval routing with email notification.	
R	55. Multiple bank accounts (6 accounts).	
R	56. Positive pay.	
R	57. Electronic check signature.	
R	58. Support P-cards.	
R	59. Employee expense management (boot allowance, travel, etc.).	
R	60. Automated bank reconciliation.	
I	61. 1099 management.	
R	Accounts Receivable	
R	62. Miscellaneous invoices – damage, charge-backs - labor and materials, development fees, deposits, other.	
R	63. Billing based on materials and labor rate/hours.	
R	64. Support payment plans.	
R	Asset Management	Vendor Response

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

R	65. Track assets and sub assets.	
I	66. Integration with GIS – track meters, hydrants, valves, etc.	
N	67. Preventative maintenance scheduling (meter testing, valve exercise, etc.)	
R	68. Ability to set up work order on the fly.	
R	69. Work orders - track time and attach pictures and documents.	
I	70. Mobile work order/time/materials/equipment entry (iPads) with store and forward.	
I	71. Label assets as critical in nature.	
N	72. Track inventory with reorder point for certain inventory items (min/max).	
I	Backflow Prevention	Vendor Response
R	73. Track 900+ backflow devices in 400+ locations - customer ID, addresses, APN number, location ID, owner, property manager, renter, etc.	
R	74. Schedule tests on a monthly basis – automated email and letter.	
R	75. Tester - Upload test information electronically to portal.	
R	76. Workflow “dunning” process – 3 warnings and then lockout.	
R	77. Failed test repair tracking.	
N	78. GIS integration for device location.	
R	79. Full device testing history maintained, by action, date, status, etc.	
R	Purchasing	Vendor Response
R	80. Support the following PO types with different procurement policies and approval procedures. a. General goods and services b. Professional services c. Construction d. Real assets	
R	81. Multiple PO workflow approval processes based on type of PO, valuation, department, GL code with secure e-signature.	
I	82. Configurable alerts at time of PO creation to notify if over budget.	
R	83. Support purchasing encumbrances.	
I	84. Support bid and quote process depending on procurement policies.	
R	85. Electronic signatures for PO.	
R	86. Blanket PO's that cross fiscal years.	
R	87. Basic vendor/contract management functionality.	
R	Utility Billing	Vendor Response
R	88. Utility account types – residential (currently 2 tiers but more in future), commercial, fire service, irrigation. (13,500 customers)	
R	89. Customer setup with attached documentation (proof of ownership, etc.).	
R	90. Customer type tracking (hospital, school, residential, multi-family).	
R	91. Online customer portal with secure account access including visibility of current bill, meter reading/consumption, online bill payment, request service, etc.	
I	92. Support Prop 218 notices – notice of rate change sent to resident and/or owner - eliminate duplicate notices to same person.	
R	93. Utility bill = fixed cost (equipment/meter) and variable cost (usage) to compute bill.	
R	94. Prorate bill in middle of month.	

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

R	95. Effective date billing based on when property will be transferred.	
R	96. Support payment plans for utility bills and backflow devices.	
R	97. Billing adjustments for leaks.	
R	98. Bill printing service – offer paperless billing. (Currently DataProse)	
R	99. Payments – Online, credit card, IVR, cash, money order, checks, ACH payment processing, recurring credit card, others.	
R	100. Apply payments to oldest outstanding invoice.	
R	101. Apply payments manually to an account.	
R	102. Support Customer accounts with no-shutoffs.	
R	103. Real time payment data with notifications to field service teams for potential shutoff updates.	
I	104. Service requests – online customer requests portal for complaints and customer service.	
R	105. Service requests – provide two-way communication between Customer Service and field staff on status of service orders.	
R	106. Service Request - notifications text/email to customers regarding service request status, leaks, past due balances, door hangers, etc.	
R	107. Dunning cycle – Workflow enabled process that can trigger IVR reminders, door tag placement, and shutoff.	
I	108. Set up routes for door hangers, shut off.	
R	109. View customer payment history.	
R	110. Meters – track meter type, meter ID, manufacturer ID, location, multiple meters to an account.	
R	111. Meters – construction meter deposit tracking.	
R	112. Meters – integration with GIS as system of record.	
R	113. Meters – integration with Sensus for meter read routing (or replace).	
R	114. Meters – future interface with Sensus AMI.	
R	Human Resources (30 employees)	Vendor Response
R	115. Position management and budgeting.	
N	116. Recruiting functionality.	
I	117. Onboarding/offboarding workflow.	
R	118. Equipment issuance and tracking.	
R	119. Benefits management.	
R	120. Employee self-service – open enrollment, life events, benefits, etc.	
R	121. Manager self-service – approvals, time-off, etc.	
R	122. Electronic signature capability (currently using DocuSign).	
R	123. Associate documents, equipment issued, etc. with employee file.	
R	124. Personnel Action Form (PAF) with approval workflow routing.	
I	125. Performance Management - quarterly employee check-in.	
N	126. Total compensation reports.	
I	127. Certification/training tracking.	
R	Timekeeping and Payroll (30 employees)	Vendor Response
R	128. Scheduling – shifts, time off, etc.	
I	129. Manager visibility of team calendar for scheduling.	
R	130. Electronic timesheets with drop downs for valid coding – department/project/hours.	
R	131. Generate W-2's	

R = Required
I = Important
N = Nice to have
E = Explore

Florin Resource Conservation District

ERP Key Requirements and Pricing Estimates

R	132. 941 Reports for Federal taxes and CA DE -9 Reports for State taxes	
R	133. Remote timesheet entry.	
R	134. Timesheet/payroll approval workflow with delegation and escalation.	
R	135. Vacation accruals, PTO, Comp Time with cash out option.	
R	136. Pay steps and grades (5 steps) + longevity pay increase (1%) after 5 years.	
R	137. Annual COLA pay adjustments.	
R	138. Retroactive pay.	
R	139. Garnishment tracking.	
R	140. License/certification premiums (Class A driver license) = \$1.50 more per hour.	
R	141. Mid-period pay changes proration.	
R	142. Overtime - 9 hours in a day or over 40 hours in a week.	
R	143. Stipends - Work boots, phone, vehicle, license.	
R	144. On-call premium - \$85/day + 2 hour minimum if called.	
R	145. Direct deposit – 5-6 bank accounts.	
R	Reporting	Vendor Response
R	146. Discuss reporting tools available including standard reports, user query reports, and business intelligence reporting tools.	
R	147. User level security flows through to queries and reports.	
R	148. User-definable executive dashboard components with drilldown.	
R	149. Drill down to source transactions from reports.	
R	150. Support consumer confidence report – annual.	
E	151. Ability to report on data using AI.	

Exhibit B – Customer References

Provide at least three references that are similar in size and scope to Florin Resource Conservation District, and that have implemented the proposed software in the past five years. References should be fully implemented and live on the current version of the software.

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	

Name of Customer:	
Number of Users:	
Contact Name/Title:	Telephone #:
Modules/Functionality Installed:	
Go Live Date:	
Other comments:	