# Executive Summary

Please submit an Executive Summary in the form of a letter to the City that introduces the Respondent and the proposal. The letter should provide the City with a brief history and overview of the Respondent, including:

* The primary focus of the Respondent’s business, key customers segments, the firm’s value proposition, and how the firm is differentiated from competitors
* Specific products, services, and resources offered by the Respondent that are relevant to this RFP, and how they will be leveraged to meet the City’s needs
* The firm’s technical, managerial, and financial capabilities to provide the services described in this RFP

Please also describe the Respondent’s vision of how it sees itself in the marketplace with a five-year outlook, including:

* A statement of strategic direction for the firm
* Plans for enhancing service offerings, related time frames, and descriptions of how enhancements will impact customers
* Vision for the product or product roadmap
* The role of customers in the ongoing development of the product

The Executive Summary letter must be signed by a person authorized by the Respondent’s firm to obligate the Respondent to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal, if selected by the City for award of contract.

# Respondent Experience

To complete this section, the Respondent must submit details about customer references; about existing business relationships with the City, if any; about the Respondent’s proposed project team; and about any partner, joint venture, or sub-contractor firms.

## Customer References

The Respondent must provide three (3) customer references for whom similar Cashiering System projects have been completed. By including these references, the Respondent is representing that the references are familiar with Respondent's work and will be truthful in their assessments of the Respondent’s experience. References must meet the following requirements:

* All of the references must be US-based clients.
* At least one of the references must handle a volume of 115,000 or more in-person cashiering transactions annually.

### **Summary Table of Respondent’s References**

The Respondent must complete the table below to provide an overview of the Respondent’s customer references.

|  |  |  |
| --- | --- | --- |
| **Reference** | **US-based client?** | **In-person cashiering volume over 115,000 annually?** |
| Reference #1 Name |  |  |
| Reference #2 Name |  |  |
| Reference #3 Name |  |  |

### **Detail Forms for Respondent’s References**

The Respondent must submit additional information related to the Respondent’s three customer references using the form below. Please copy the form for each reference, and label the forms Reference #1, Reference #2, and so on. These references must be the same as the references provided in Section 2.1.1 above.

References may be contacted to verify that the Respondent has experience in design, development, and implementation of solutions similar in size, complexity, and scope to this procurement. Please obtain prior approval for the City to contact the references.

|  |
| --- |
| **Customer Information****Customer Information** |
| Customer Organization:  | Customer Contact Name:  |
| Customer Address:  | Customer Contact Phone:  |
| Customer Contact Email:  |
| **Project Information** |
| Start & Completion Dates: | From: |  | To: |  |
| Project description (provide sufficient details about the size, complexity, and scope of this customer’s project to demonstrate similarities to the City’s project): |
| Respondent’s involvement: |
| Project benefits to the business (please include any project outcomes that illustrate the benefit):  |
| Unanticipated challenges and mitigations; lessons learned:  |
| If the Respondent performed the work as a Subcontractor, the Respondent must describe the scope of subcontracted activities: |
| Total Respondent Staff: |  |
| **Confirmation of Information from Section 3.1.1** |
| US-based client? | Yes  | No  |
| Over 115,000 in-person cashiering transactions annually? | Yes  | No  |

## Existing Business Relationships with the City

Describe any existing or recent business relationships (within the last five years) that the Respondent has with City departments and divisions, or that any of its affiliates or proposed Subcontractors have with City departments and divisions. Please note whether any contracts with the City within the last five years are still active or have ended.

## Respondent’s Project Team

### **Project Team Personnel**

Please provide a list of proposed personnel, identifying each key person on the project team and the role that each will play in the project.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Years of Experience** | **Years with Company** |
| Example Name 1 | Etc. | Etc. | Etc. |
| Example Name 2 | Etc. | Etc. | Etc. |
| Example Name 2 | Etc. | Etc. | Etc. |

For each project team member listed, submit a brief summary that describes the individual’s experience and qualifications, including the role that each played in any project(s) referenced in above, if applicable. Additionally, please provide a high-level description of each individual’s responsibilities as they would relate to this RFP.

Respondents must provide written assurance that key individuals identified will be performing the work as described and will not be substituted with other personnel or reassigned to another project without the City’s prior approval.

### **Project Organization and Staffing Chart for this Project**

Provide a proposed organization chart that shows the relationships among the Respondent’s key project personnel described in Section 2.3.1 above.

### **Project Team’s Approach to Collaborating with Other City Contractors**

Describe the proposed approach and procedures regarding collaborating and working in partnership with the other City contractors supporting the System project (e.g. vendors of source systems, or possibly other System functionality implementers). Respondents should expect to work on coordinated work streams with inter-vendor dependencies throughout the engagement, and all contractors will be expected to contribute to project and program-level management of planning, risk mitigation, and reporting.

## Partner, Joint Venture, or Subcontractor Firm(s)

### **Firm Profile(s)**

If the Respondent proposes the use of Partner, Joint Venture, and/or Subcontractor firm(s), the Respondent shall complete a separate copy of the form below for each firm. Please indicate any firms that support the proposal’s LBE requirement, if applicable.

|  |
| --- |
| **Partner, Joint Venture, or Subcontractor Organization Profile** |
| Organization Name: |  |
| Mailing Address: |  |
| Phone Number: |  |
| Email Address: |  |
| Number of Employees: |  |
| Services that will be provided by the Organization: |  |
| Experience of Organization in performing the services to be provided: |  |
| Number and brief description of projects on which Respondent has partnered with this Organization: |  |
| Locations where the Organization’s work will be performed: |  |
| Will the Respondent guarantee the performance of this Organization? | Yes [ ]  | No [ ]  |
| Is this Organization an LBE? | Yes [ ]  | No [ ]  |

### **Subcontractor Personnel**

Provide a list of proposed subcontractor personnel, identifying each key person on the project team. Include the role of each individual with regard to the project and a summary of each individual’s high-level responsibilities.

### **Subcontractor Project Organization and Staffing Chart**

Provide a proposed organization chart that shows the relationships among the Subcontractor personnel described in Section 2.4.2 above. Include any reporting relationships to the Respondent’s key project personnel described in Section 2.3.1.