



**Competitive Sealed Proposal
for
ERP, Historical Archive, and Decommissioning Services**

**Event # 1067
Bid Specifications**

The MetroHealth System

OPEN DATE: October 13th, 2026, at 8:00am EST

CLOSE DATE: October 26th, 2026, at 1:00pm EST



COMPETITIVE SEALED PROPOSAL

Infor/Lawson Historical Archive, and Decommissioning Services

Professional Services and Technology for Data Preservation, Historical Access, Compliance, Application Retirement, and Operational Transition

Event Information	Date
Event Number	TBD
Open Date	10/13/2026 at 8am
Q&A Open	10/14/2026 at 8am
Q&A Close	10/21/2026 at 5pm
Close Date	10/26/2026 at 1pm
Planned Workday Go-Live	January 2028
Target Lawson Decommissioning	To be proposed by respondent



Contents

I. Introduction and Statement of Purpose	5
About The MetroHealth System	5
Statement of Purpose and Engagement Objective.....	6
Historical Archive Vision	6
Definition of Success	6
II. Current Environment and Scope Context	7
Current ERP Footprint	7
Scope Boundaries.....	7
III. Project Management and Governance	7
IV. Discovery, Inventory, and Disposition Planning	8
Required Discovery Activities	8
V. Records Retention, Legal Hold, and Data Governance.....	9
VI. Data Extraction, Transformation, and Preservation	10
Extraction Scope	10
VII. Historical Archive Platform Requirements	11
Hosting, Deployment, and Data Residency.....	11
Archive Data Model & Business Context	11
User Experience and Search	11
Reporting and Data Access	12
Administration and Operating Model.....	12
Archive Performance	12
VIII. Identity, Security, Privacy, and Compliance	13
Identity	13
Access Control.....	13
Encryption and Data Protection.....	13
Logging and Audit	14
Incident Response and Security Operations	14
Certifications and Compliance	14
Delegated Approval	14
IX. Data Validation, Reconciliation, and Acceptance	16
Validation Requirements	16
X. Reporting, Analytics, EDW, and Downstream Dependencies.....	16



XI. Integration, Batch, Workflow, and Interface Retirement.....	17
XII. Infrastructure and Application Decommissioning	17
Technical Retirement Activities	18
XIII. Business Continuity, Backup, and Disaster Recovery	18
XIV. Training, Change Management, and Knowledge Transfer	18
XV. Cutover, Stabilization, and Support.....	19
XVI. Respondent Qualifications and Staffing	20
Respondent Qualifications.....	20
References	20
Proposed Project Team.....	20
Staffing Model and Resource Management	21
XVII. Proposal Response Requirements.....	22
XVIII. Security, Privacy, Compliance, and Commercial Requirements.....	22
Protected Information	22
Third-Party Risk.....	23
Subcontracting and Offshoring	23
Conflicts, Insurance, and Contracting.....	23
Data Ownership and Portability.....	23
Work Product and Intellectual Property.....	23
Auditability.....	23
XIX. Timeline and Critical Dates	23
XX. Evaluation Criteria.....	24
Demonstration Scenarios.....	24
XXI. Attachment Reference.....	25



I. Introduction and Statement of Purpose

About The MetroHealth System

The MetroHealth System ("MetroHealth") is redefining health care by going beyond medical treatment to improve the foundations of community health and well-being: affordable housing, a cleaner environment, economic opportunity and access to fresh food, convenient transportation, legal help, and other services. The system strives to become as good at preventing disease as it is at treating it.

The system's more than 600 doctors, 1,700 nurses and 7,800 employees go to work each day with a mission of service, to their patients and to the community. As Cuyahoga County's safety-net health system, MetroHealth plays an essential role in the region, caring for anyone and everyone, regardless of an ability to pay.

Founded in 1837, MetroHealth operates four hospitals, four emergency departments and more than 20 health centers and 40 additional sites throughout Cuyahoga County. The system serves more than 300,000 patients, two-thirds of whom are uninsured or covered by Medicare or Medicaid.

MetroHealth is home to Cuyahoga County's most experienced Level I Adult Trauma Center, verified since 1992, and Ohio's only adult and pediatric trauma and burn center.

As an academic medical center, MetroHealth is committed to research and to teaching and training tomorrow's caregivers. Each active staff physician holds a faculty appointment at Case Western Reserve University School of Medicine. Its main campus hospital houses the Cleveland Metropolitan School District's Lincoln-West School of Science & Health, the only high school in America located inside a hospital.

Knowing that good health is about much more than good medical care, MetroHealth has launched the **Institute for H.O.P.E.**™ (Health, Opportunity, Partnership, Empowerment), which uses a coordinated, collaborative and strategic approach to help patients with non-medical needs such as healthy food, stable housing and job training.

The MetroHealth Glick Center, a new 11-floor hospital, on the system's main campus in Cleveland welcomed its first patients in October 2022. The billion-dollar project is the cornerstone of a wider neighborhood revitalization effort led by the system and its partners in the community.

For more information, visit metrohealth.org.



Statement of Purpose and Engagement Objective

MetroHealth seeks a qualified partner to provide a comprehensive historical archive solution and associated decommissioning services for the retirement of the Infor/Lawson ERP platform. The selected solution shall preserve historical business information, maintain required regulatory and operational records, and provide secure, user-friendly access to archived data throughout its retention lifecycle. MetroHealth's objective is to retire the legacy Infor/Lawson environment while ensuring authorized users can continue to search, retrieve, report on, export, and utilize historical information for operational, financial, payroll, supply chain, audit, compliance, legal, regulatory, public records, and analytic purposes without reliance on the legacy ERP application.

Historical Archive Vision

MetroHealth seeks a long-term historical archive platform that provides secure preservation and practical business access to retired Infor/Lawson information. The archive is expected to become the primary mechanism for accessing historical ERP data after Lawson retirement and shall support self-service inquiries, historical reporting, audit support, legal and compliance reviews, public records requests, data exports, and business research throughout the lifecycle of the archived information. MetroHealth's objective is not merely to preserve data, but to ensure that historical information remains understandable, searchable, accessible, and useful to authorized users for many years following decommissioning of the legacy ERP platform.

Definition of Success

- Historical Finance, Supply Chain, Human Resources, Payroll, Benefits, and related records are complete, accurate, reconciled, secure, searchable, and available to authorized users.
 - MetroHealth can satisfy audit, tax, grant, payroll, employment, legal, public-records, and regulatory requests without operating the legacy ERP.
 - All in-scope integrations, reports, jobs, accounts, infrastructure, and vendor services are inventoried and dispositioned.
 - Infor/Lawson applications and supporting technology are retired through approved phase gates with rollback and evidence of completion.
 - Retention, legal hold, disposition, access, monitoring, backup, recovery, and support processes are documented and operational.
 - MetroHealth support teams receive complete knowledge transfer, runbooks, administrative training, and ownership of agreed work products.
-
- Historical information remains readily accessible to authorized users through an intuitive, self-service archive platform.
 - Business users can independently search, view, retrieve, report on, and export historical records without requiring technical assistance.
 - Historical reporting, audit support, legal inquiries, compliance reviews, public records requests, and operational research can be performed without reliance on the legacy Infor/Lawson environment.



- The archive platform serves as the authoritative historical repository for retired Lawson data throughout applicable retention periods.

II. Current Environment and Scope Context

Current ERP Footprint

MetroHealth currently uses Infor/Lawson capabilities supporting Finance, Supply Chain, Human Resources, Payroll, Benefits, reporting, interfaces, workflow, and historical records. The environment includes Infor S3 and Landmark/GHR components and related technologies. Final scope, versions, data volumes, environments, integrations, reports, attachments, and infrastructure will be validated during discovery.

Domain	Representative In-Scope Content
Finance	General Ledger, Accounts Payable, Accounts Receivable, Billing, Asset Management, Cash/Treasury, Grants/Projects, close and reconciliation history
Supply Chain	Suppliers, items, requisitions, purchase orders, receipts, inventory, contracts, sourcing, EDI, pricing, and transaction history
Human Resources	Worker and employment history, positions, jobs, compensation, benefits, talent, onboarding/offboarding, certifications, and organizational history
Payroll	Payroll results, earnings, deductions, taxes, balances, checks/direct deposits, W-2 and related history, adjustments, and audit data
Technical	S3, Landmark/GHR, Lawson System Foundation, Process Automation, ION/Ming.le where applicable, databases, servers, batch schedules, security, reports, interfaces, files, and attachments
Connected Content	OnBase or other document references, report output, print files, interface archives, SFTP files, and external system dependencies

Scope Boundaries

- This RFP focuses on historical preservation, archive access, legacy retirement, and decommissioning. It does not replace Workday implementation responsibilities unless explicitly stated.
- Respondents must identify any work that depends on Workday conversion, fiscal close, payroll close, tax processing, audit cycles, grant closeout, or other business milestones.
- Quantities and inventories are planning assumptions. Respondents must validate them and identify pricing thresholds and change-control triggers.

III. Project Management and Governance

- Lead project coordination and maintain an integrated schedule aligned with Workday deployment, stabilization, legacy support, financial close, payroll processing, and audit calendars.
- Create and maintain the project plan, resource plan, RACI, budget tracker, RAID log, issue log, decision log, dependency log, deliverable register, quality plan, test plan, cutover plan, decommission plan, and stabilization plan.



- Provide weekly status reporting covering accomplishments, planned work, scope, schedule, budget, risks, issues, decisions, dependencies, and leadership escalations.
- Use formal phase gates and acceptance criteria for discovery, design, pilot, extraction, validation, production archive, read-only transition, shutdown rehearsal, final decommissioning, and project closure.
- Coordinate all respondent, MetroHealth, Infor, Workday, hosting, database, security, network, reporting, document-management, and third-party responsibilities.
- Apply formal scope, quality, change-control, escalation, and deliverable-acceptance processes.

Respondent requirement: Describe the proposed methodology, governance model, phase gates, schedule-management approach, quality controls, escalation process, and status reporting. Include a sample project plan, RACI, status report, RAID log, and deliverable-acceptance form.

IV. Discovery, Inventory, and Disposition Planning

Required Discovery Activities

- Inventory all Infor/Lawson applications, modules, environments, databases, schemas, tables, files, attachments, reports, queries, batch jobs, workflows, interfaces, service accounts, security roles, users, licenses, vendors, and infrastructure.
- Identify data owners, custodians, stewards, business users, technical owners, auditors, and approvers by subject area.
- Document business processes and obligations that require historical access, including routine inquiries, audits, legal requests, payroll research, tax requests, grant reviews, supplier inquiries, and financial reconciliation.
- Identify upstream and downstream dependencies, including second- and third-hop data flows, enterprise data warehouse loads, report extracts, SFTP exchanges, middleware, APIs, shared folders, and manual processes.
- Assess current backup, disaster recovery, high availability, patching, monitoring, encryption, logging, and privileged-access practices.
- Classify each component as retain temporarily, migrate, archive, replace, retire, consolidate, or exclude, with rationale, dependencies, owner, target date, and evidence required.

Required Discovery Deliverables

Deliverable	Minimum Content
Application and Infrastructure Inventory	Components, versions, environments, owners, hosting, database, operating system, support status, dependencies, costs, and disposition
Data and Records Inventory	Subject areas, tables/files, date range, volume, sensitivity, retention class, legal hold applicability, source owner, and archive target
Integration and Job Inventory	Source, target, purpose, schedule, protocol, file/API format, owner, monitoring, downstream use, and retirement plan
Report and Inquiry Inventory	Report/query name, audience, frequency, source data, retention need, future platform, and validation method
Disposition Matrix	Retain, migrate, archive, replace, retire, exclude, timing, dependency, approver, and evidence
Decommission Roadmap	Phase gates, sequence, schedule, dependencies, risk controls, rollback points, and approvals



Respondent requirement: Provide the discovery approach, tools, workshops, data requests, staffing, MetroHealth effort, assumptions, deliverables, and process for resolving incomplete or conflicting inventory information.

V. Records Retention, Legal Hold, and Data Governance

The archive platform shall support retention periods ranging from temporary operational retention through permanent retention, as determined by MetroHealth Records Management, Legal, Compliance, Human Resources, Payroll, Finance, Internal Audit, and Information Security policies.

- The proposed solution must support MetroHealth's records retention policies and procedures and enable compliance with all applicable federal, state, regulatory, accreditation, legal, tax, employment, public records, and healthcare record-retention requirements.
- Facilitate development of a retention matrix approved by MetroHealth Legal, Compliance, Privacy, Records Management, Internal Audit, Finance, Human Resources, Payroll, Supply Chain, Grants, and Information Security as applicable.
- Support configurable retention schedules by record category, business function, and data classification.
- Preserve legal holds and prevent alteration or disposition of held records until authorized release.
- Support defensible disposition processes including approval workflows, disposition reporting, destruction certification, and retention of supporting evidence.
- Document authoritative source, data ownership, stewardship, classification, sensitivity, lineage, quality rules, access model, and disposition authority.
- Identify duplicate records and copies across Workday, the archive, enterprise data warehouse, reports, file shares, backups, and document systems and recommend the governing retention approach.
- Support retention and access requirements associated with agencies and authorities including, but not limited to:
 - Internal Revenue Service (IRS)
 - Centers for Medicare & Medicaid Services (CMS)
 - U.S. Department of Labor (DOL)
 - Equal Employment Opportunity Commission (EEOC)
 - Ohio Department of Taxation
 - Ohio Department of Health
 - Ohio Public Records requirements
 - Joint Commission accreditation requirements
 - ERISA and employee benefit plan record retention requirements
 - Other federal, state, county, regulatory, accreditation, grant, audit, and legal retention obligations applicable to MetroHealth



Respondent requirement: Describe capabilities for configurable retention, event-based retention, legal hold, immutable storage, defensible disposition, disposition approval, destruction certification, audit trails, and preservation of record relationships and business context.

VI. Data Extraction, Transformation, and Preservation

Extraction Scope

- Extract all approved in-scope structured data, metadata, code descriptions, effective-dated history, audit history, attachments, images, print files, report output, and cross-reference information.
- Preserve relational integrity, compound keys, effective dating, transaction links, document associations, chart-of-account context, organizational context, and user-meaningful descriptions.
- Maintain source identifiers and provide traceability from archive records to original systems, tables, fields, files, and extraction runs.
- Support repeatable full and incremental extraction cycles during implementation and final cutover.
- Encrypt data in transit and at rest and protect temporary staging, logs, credentials, and extracts.
- Document excluded fields, transformations, normalization, derived values, redactions, and unresolved exceptions.

Minimum Subject Areas

Subject Area	Representative Data
Finance	Companies, accounting units, chart elements, journals, balances, transactions, invoices, payments, receivables, assets, cash, grants, projects, budgets, close, and reconciliation artifacts
Supply Chain	Suppliers, items, contracts, requisitions, purchase orders, receipts, inventory, transfers, adjustments, sourcing, EDI references, and supporting documents
Human Resources	Workers, employment events, positions, jobs, organizations, compensation, benefits, dependents where approved, qualifications, certifications, and personnel history
Payroll and Tax	Payroll results, pay periods, earnings, deductions, taxes, balances, payments, retroactivity, adjustments, W-2 history, and payroll controls
Security and Audit	Users, roles, permissions, privileged access, workflow approvals, changes, process history, audit events, and access evidence
Documents and Outputs	Attachments, invoices, statements, checks, advices, forms, images, interface files, report output, and relevant metadata



Respondent requirement: Provide extraction architecture, supported Infor/Lawson sources, handling of attachments and binary content, full and incremental methods, staging controls, encryption, reconciliation, exception handling, and final source-to-archive traceability.

VII. Historical Archive Platform Requirements

Hosting, Deployment, and Data Residency

Deployment Model Requirements

- MetroHealth seeks responses for multiple deployment options, including:
 - Vendor-hosted Software-as-a-Service (SaaS)
 - Vendor-hosted private cloud
 - MetroHealth-hosted on-premises deployment
 - MetroHealth-hosted cloud deployment
 - Hybrid deployment models
 - Other deployment architectures proposed by the respondent
- Respondents shall identify which deployment models are supported and provide separate pricing, implementation requirements, infrastructure requirements, support models, service levels, security controls, and ongoing operational responsibilities for each option.
- The archive solution shall maintain equivalent functionality, security, retention, legal hold, reporting, self-service access, and audit capabilities regardless of deployment model.
- The solution shall clearly identify all infrastructure, storage, database, backup, disaster recovery, networking, monitoring, and administrative responsibilities assigned to MetroHealth and to the respondent for each deployment option.
- Respondents shall describe data residency, geographic hosting locations, data sovereignty considerations, and available options for MetroHealth control of archived data.
- The solution shall support migration between deployment models without requiring re-implementation, re-ingestion of historical data, or significant business disruption.
- The solution shall provide documented procedures and pricing associated with data extraction, migration, platform transition, and contract termination.

Archive Data Model & Business Context

- The archive solution shall preserve business context, field descriptions, code translations, chart-of-account relationships, organizational hierarchies, approval

workflows, effective dating, historical security context, and other metadata necessary for business interpretation of archived records.

User Experience and Search

- Browser-based access without legacy Infor/Lawson client software.
- Intuitive search by common business keys such as worker, employee ID, supplier, invoice, payment, purchase order, item, journal, account, accounting unit, grant, project, date, amount, and document number.



- Authorized MetroHealth users shall be able to independently access, search, view, retrieve, print, and export archived historical information without requiring IT, database administrator, or vendor assistance.
- Cross-record navigation and drill-through that preserves relevant business relationships.
- Filtering, sorting, saved searches, configurable views, export, print, and retrieval of associated documents.
- Clear indication that archive content is read-only historical information and not the current system of record.
- Accessible design and support for standard modern browsers.

Reporting and Data Access

- Delivered historical reports and the ability to reproduce agreed critical legacy reports.
- Export controls for PDF, CSV, Excel-compatible output, and other approved formats.
- APIs or governed data access for approved integration, analytics, audit, and eDiscovery use cases.
- Ability to apply row-level, subject-area, organizational, and role-based restrictions.
- Performance and concurrency appropriate for routine business inquiries, audit peaks, and bulk legal requests.
- The solution shall support extraction, export, API access, or integration methods enabling future AI, eDiscovery, legal review, records management, and enterprise search initiatives.

Administration and Operating Model

- Administrative tools for users, roles, configuration, retention, legal holds, monitoring, audit review, support, and usage reporting.
- Documented release management, maintenance windows, change notifications, backward compatibility, and customer testing expectations.
- Service health, capacity, storage, performance, usage, access, incident, and compliance reporting.
- Support for data export and transition at contract end without vendor lock-in.

Archive Performance

- Respondent shall propose and commit to performance benchmarks for standard searches and document retrievals
- Concurrent user support requirements.
- Archive available 99.9% or higher.
- Support for audit and legal review workloads without degradation.

MetroHealth reserves the right to select a deployment model independent of the respondent's preferred architecture. Respondents must identify any functionality, performance, compliance, security, retention, legal hold, self-service access, reporting, or support limitations associated with each deployment option.

Respondent requirement: Respondent shall describe the proposed archive solution, supported deployment models, pricing, implementation and support requirements, security and compliance



capabilities, data residency options, reporting and search functionality, administrative features, performance benchmarks, and data migration/exit capabilities.

Responses should include

- Logical architecture diagram
- Physical architecture diagram
- Data flow diagram
- Security architecture diagram
- Identity architecture
- Backup and recovery architecture
- Archive ingestion architecture

Respondent shall identify any deployment limitations, required customizations, third-party dependencies, additional licensing, and ongoing operational responsibilities. Supporting screen samples, demonstration materials, security matrices, API documentation, and product roadmap information should be provided.

VIII. Identity, Security, Privacy, and Compliance

Identity

- Integrate with Microsoft Entra ID for single sign-on (SSO).
- Support multifactor authentication (MFA) and conditional access policies.
- Support automated user provisioning and deprovisioning.

Respondent Requirement:

Describe identity management capabilities, including Entra ID integration, SSO, MFA, conditional access support, user lifecycle management, and any identity-related limitations or licensing requirements.

Access Control

- Provide role-based access control (RBAC) and least-privilege security.
- Support segregation of duties and privileged-access management.
- Support periodic access certification and review processes.
- Provide emergency-access procedures and auditability.
- Support restrictions based on role, organization, subject area, and record type.

Respondent Requirement:

Describe access control capabilities, security roles, privileged-access controls, access review processes, and methods used to enforce least-privilege access. Provide a security role matrix and identify any customization required.

Encryption and Data Protection

- Encrypt data in transit and at rest.
- Support key, certificate, and secrets management.
- Provide data masking, tokenization, and data-loss-prevention (DLP) capabilities.
- Identify all sensitive data types supported, including PII, PHI, payroll, tax, financial, supplier, banking, credential, and other confidential information.

Respondent Requirement:



Describe encryption standards, key management processes, data protection controls, and sensitive data handling practices. Identify all categories of confidential information that may be stored, processed, transmitted, or accessed by the solution.

Logging and Audit

- Log successful and failed authentication attempts.
- Log searches, record views, exports, administrative changes, retention actions, legal holds, and privileged operations.
- Support audit reporting and monitoring.

Respondent Requirement:

Describe audit logging capabilities, log retention, reporting, monitoring, and export options. Include sample audit reports and identify any limitations.

Incident Response and Security Operations

- Support security monitoring and incident response processes.
- Support forensic investigations, breach notification, vulnerability management, and penetration testing.
- Follow secure software development practices.
- Maintain third-party risk management controls.

Respondent Requirement:

Describe incident response procedures, breach notification commitments, vulnerability management programs, penetration testing practices, secure development processes, and third-party risk management activities.

Certifications and Compliance

- Support applicable healthcare, financial, privacy, records retention, audit, eDiscovery, and legal hold requirements.
- Provide evidence of independent security assessments and compliance programs.

Respondent Requirement:

Provide details regarding applicable certifications, attestations, and independent assessments, including SOC 1, SOC 2, ISO 27001, HITRUST, or comparable certifications. Identify report availability and any confidentiality restrictions.

Delegated Approval

- Support delegated access approval workflows.
- Enable designated business data owners to approve, deny, and periodically recertify access requests.
- Support approval authority for Human Resources, Payroll, Finance, Supply Chain, Compliance, Legal, and Internal Audit functions.



Respondent Requirement:

Describe how delegated access approvals, recertifications, and access governance are managed within the solution. Include workflow examples, approval routing capabilities, auditability, and reporting available to business data owners.



IX. Data Validation, Reconciliation, and Acceptance

Validation Requirements

- Validate extracted and archived data through source and target row counts, file counts, control totals, hash, or checksum comparison where appropriate, referential-integrity checks, duplicate checks, null checks, date-range coverage, and attachment completeness.
- Reconcile financial balances and transactions, payroll results and controls, supplier and purchasing history, worker history, and other material subject areas using approved methods.
- Validate critical legacy reports and user inquiries against the source system during parallel availability.
- Maintain an exception register with severity, owner, cause, correction, retest evidence, disposition, and approval.
- Provide business-user acceptance testing, audit sampling, security testing, performance testing, accessibility testing, failover testing, and restore testing.
- Obtain documented sign-off from designated data owners and technical approvers before each phase gate.

Acceptance Area	Required Evidence
Completeness	Counts by table/file/subject area, date coverage, attachment counts, extraction logs, and exceptions
Accuracy	Control totals, sampled record comparison, field-level validation, report comparison, and business-owner approval
Security	Access tests, role validation, SSO/MFA results, logging evidence, vulnerability results, and remediation status
Usability	Search scenarios, historical reports, exports, response times, accessibility results, and user acceptance
Recoverability	Backup evidence, restore test, recovery procedures, recovery objectives, and test results
Decommission Readiness	Dependency sign-offs, job/interface shutdown evidence, rollback readiness, approvals, and final checklist

Respondent requirement: Describe the complete validation and reconciliation methodology, automated controls, sampling approach, test cycles, defect management, acceptance thresholds, evidence package, and MetroHealth resource requirements.

X. Reporting, Analytics, EDW, and Downstream Dependencies

- Inventory all reports, queries, database views, extracts, enterprise data warehouse loads, dashboards, reconciliations, and analytics dependent on Infor/Lawson.
- Classify each item as retire, replace in Workday, rebuild in the archive, rebuild in the enterprise data warehouse, retain temporarily, or otherwise disposition.
- Preserve source-to-report lineage, business definitions, field mappings, calculations, security, schedules, owners, and validation evidence for retained or rebuilt reporting.
- Coordinate with MetroHealth enterprise analytics teams regarding Infor/Lawson tables currently loaded to the enterprise data warehouse and determine future-state history, incremental loading, and longitudinal reporting needs.



- Prevent decommissioning until approved downstream replacements and reconciliations are complete.

Respondent requirement: Provide a report and dependency rationalization approach, sample inventory, lineage deliverables, EDW transition method, and pricing assumptions for reproducing critical historical reports and governed data extracts.

XI. Integration, Batch, Workflow, and Interface Retirement

- Inventory and disposition inbound and outbound interfaces, APIs, database links, SFTP transfers, middleware jobs, shared-folder exchanges, scheduled tasks, batch jobs, workflows, notifications, printers, service accounts, certificates, and monitoring.
- Identify production, test, development, disaster-recovery, and shadow dependencies.
- Coordinate retirement with source and target owners and obtain written confirmation that each flow is replaced, no longer required, or intentionally preserved.
- Disable components in controlled stages, monitor for errors, and missed dependencies, and maintain rollback procedures.
- Revoke credentials, certificates, firewall rules, network routes, allow lists, scheduled tasks, and access only after approvals and retention of required evidence.
- Update architecture diagrams, CMDB or asset records, monitoring, service desk procedures, and support ownership.

Respondent requirement: Describe the interface-retirement methodology, dependency discovery tools, shutdown sequencing, observation period, rollback, owner sign-off, evidence, and handling of previously unidentified dependencies.

XII. Infrastructure and Application Decommissioning

Phased Retirement

Phase	Minimum Exit Criteria
1. Production Operations	Workday and downstream replacements are stable; required Lawson processing is complete; archive extraction and validation are underway
2. Read-Only Lawson	Transactions disabled; approved users retain temporary inquiry access; final deltas and validation continue
3. Shutdown Rehearsal	Archive, reports, interfaces, backup, restore, support, and rollback have been tested; approvals documented
4. Controlled Shutdown	Applications, databases, jobs, and interfaces stopped for an approved observation period with monitoring and rollback readiness

5. Final Decommission	Licenses, hosting, infrastructure, accounts, connectivity, backups, contracts, and support services dispositioned; closure evidence approved
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Technical Retirement Activities

- Decommission Infor S3, Landmark/GHR, Lawson System Foundation, middleware, reporting, workflow, database, operating-system, storage, network, backup, disaster-recovery, and monitoring components within the approved scope.
- Preserve designated final backups or forensic images only when explicitly approved, with owner, retention, encryption, storage, restore procedure, and destruction date documented.
- Coordinate license and subscription termination, hosting changes, support contracts, certificates, domains, service accounts, and third-party services.
- Remove unsupported software, release infrastructure and cloud resources, update inventories, and diagrams, and provide cost-avoidance evidence where available.
- Produce a signed decommission certificate and final configuration and evidence archive.

Respondent requirement: Provide a detailed decommissioning runbook, resource model, phase gates, observation periods, rollback approach, responsibilities, license and contract coordination, infrastructure retirement procedures, and final certification package.

XIII. Business Continuity, Backup, and Disaster Recovery

- Define service availability, backup, replication, restore, disaster recovery, cyber recovery, and resiliency architecture for the archive solution.
- Propose measurable recovery time and recovery point objectives and identify dependencies required to meet them.
- Conduct implementation restore testing and disaster-recovery testing and provide evidence and remediation results.
- Document downtime, business-continuity, manual-retrieval, escalation, and communication procedures.
- Protect backups from unauthorized alteration and define retention, encryption, access, testing, and destruction.

Respondent requirement: State proposed availability, recovery objectives, backup frequency, retention, geographic redundancy, restore testing, disaster-recovery testing, scheduled maintenance, service credits, and customer responsibilities.

XIV. Training, Change Management, and Knowledge Transfer

- Identify stakeholder and role impacts for Finance, Supply Chain, Human Resources, Payroll, Benefits, Grants, Legal, Compliance, Privacy, Internal Audit, Information Security, Enterprise Analytics, application support, infrastructure, service desk, and end users.
- Develop role-based communications and training for archive users, administrators, auditors, support teams, records managers, legal-hold administrators, and service desk personnel.
- Provide editable job aids, administrator guides, user guides, FAQs, process flows, recordings, troubleshooting guides, and support runbooks.
- Conduct hands-on knowledge transfer, shadowing, reverse-shadowing, and readiness validation throughout the project.



- Define post-go-live adoption, usage, search success, support-volume, and training-effectiveness measures.

Respondent requirement: Provide the change, communication, training, and knowledge-transfer approach, audiences, deliverables, delivery formats, assumptions, ownership, and acceptance method.

XV. Cutover, Stabilization, and Support

- Develop an integrated cutover plan covering final extraction, delta loads, reconciliation, archive publication, access activation, report validation, read-only transition, job and interface retirement, shutdown rehearsal, shutdown, rollback, and communications.
- Coordinate cutover with Workday stabilization, payroll cycles, financial close, year-end tax activities, audits, grant reporting, and other critical operations.
- Provide hypercare and stabilization with defined triage, severity, response, resolution, escalation, defect, communication, and exit processes.
- Provide ongoing SaaS and/or managed support with service levels, support hours, named roles, knowledge base, release support, security support, compliance support, and annual testing.
- Provide optional services for new reports, additional data sources, eDiscovery, bulk requests, retention changes, legal holds, data disposition, and contract-exit assistance.

Respondent requirement: Provide staffing and coverage for cutover, stabilization, and ongoing support, including onsite/remote assumptions, hours, severity levels, response and resolution targets, escalation paths, stabilization duration, exit criteria, and optional managed services.



XVI. Respondent Qualifications and Staffing

MetroHealth seeks a respondent with demonstrated experience delivering enterprise archive solutions for complex healthcare organizations, including the retirement of Infor/Lawson environments and support for ERP transformation initiatives.

Respondent Qualifications

Respondents shall demonstrate:

- Experience archiving and decommissioning Infor/Lawson S3 and Landmark/GHR environments.
- Healthcare industry experience supporting Finance, Supply Chain, Human Resources, Payroll, Privacy, Security, Audit, Compliance, and Records Management functions.
- Experience supporting ERP modernization or replacement programs, including Workday implementations and associated reporting, integration, and historical data retention requirements.
- Experience preserving business context, historical relationships, effective-dated data, attachments, audit history, reports, metadata, and complex data structures within archived environments.
- Capability to provide the functional, technical, and project resources necessary to successfully implement, transition, and support the archive solution.

References

Respondent Requirement:

Provide a minimum of three (3) comparable client references, including at least two (2) healthcare organizations and two (2) Infor/Lawson retirement or archival engagements. For each reference, include:

- Organization name
- Scope and objectives
- Application modules archived
- Data volume and record count
- Archive platform utilized
- Project dates
- Business outcomes achieved
- Customer contact information
- Permission status for reference contact

Proposed Project Team

Respondent Requirement:

Provide resumes, biographies, and relevant experience for the proposed project team, including, at a minimum:

- Engagement Executive/Leader
- Project Manager
- Infor/Lawson Solution Architect
- Data Architect
- Archive Platform Lead
- Finance Subject Matter Expert
- Supply Chain Subject Matter Expert
- HR/Payroll Subject Matter Expert



- Security Architect
- Records Management / Compliance Lead
- Integration Lead
- Reporting and Analytics Lead
- Testing Lead
- Change Management and Training Lead
- Cutover Lead
- Support Services Lead

For each resource, identify role, responsibilities, years of experience, relevant certifications, and experience with comparable healthcare archive initiatives.

Staffing Model and Resource Management

Respondent Requirement:

Identify all personnel assigned to the engagement, including employees, subcontractors, partner resources, onshore resources, offshore resources, remote resources, and onsite resources. Describe the proposed staffing model, resource governance approach, knowledge transfer processes, and procedures for managing performance and staffing continuity. Identify key personnel and acknowledge that MetroHealth approval will be required for replacement of key project resources. Describe the respondent's approach to resource replacement and transition planning to minimize project disruption and maintain delivery commitments.



XVII. Proposal Response Requirements

- Executive summary and understanding of MetroHealth objectives.
- Proposed solution architecture, hosting model, product description, and service model.
- Detailed response to every requirement in this RFP, clearly identifying standard, configurable, custom, optional, third-party, and unavailable capabilities.
- Methodology, phases, work plan, milestones, integrated schedule, phase gates, and critical path.
- Deliverables list with owner, timing, prerequisites, acceptance criteria, format, and sample artifacts.
- Assumptions, dependencies, constraints, exclusions, client responsibilities, and required access.
- Project organization chart, RACI, staffing plan, resumes, and resource-loading schedule.
- Data extraction, preservation, archive, security, retention, legal hold, validation, reporting, EDW, integration retirement, decommissioning, training, cutover, support, and contract-exit approach.
- Risk register with the respondent's highest project and operational risks and proposed mitigations.
- Comparable healthcare references and demonstrated outcomes.
- Pricing response, payment schedule, contract exceptions, subcontractors, offshoring, conflicts, insurance, security, privacy, and supplier diversity information.

Pricing Requirements

- Provide an all-in fee by phase, workstream, deliverable, environment, data source, module, and resource role.
- Separately identify fixed-fee, time-and-materials, software, subscription, storage, user, environment, implementation, migration, report, API, support, travel, third-party, optional, and contingency amounts.
- Provide role-based hourly rates, estimated hours, and not-to-exceed amounts.
- Identify pricing tiers and assumptions for data volume, attachments, users, environments, reports, exports, APIs, retention periods, legal holds, eDiscovery, and annual growth.
- Provide a milestone-based payment schedule tied to MetroHealth acceptance of deliverables.
- Identify rate-card validity, annual escalators, service credits, change-order rules, termination charges, data-exit charges, and any minimum commitments.
- Provide ten-year total cost of ownership, including implementation, subscription, storage, support, upgrades, growth, optional services, and contract exit.

XVIII. Security, Privacy, Compliance, and Commercial Requirements

Protected Information

State whether the respondent will create, store, view, maintain, transmit, process, or support PII, PHI, payroll, tax, financial, supplier, banking, workforce, credential, or other confidential information. Describe safeguards, encryption, access controls, logging, incident response, retention, destruction, and breach notification.



Third-Party Risk

The selected respondent will be required to complete MetroHealth third-party risk assessment activities and remediate identified risks as required.

Subcontracting and Offshoring

Identify all proposed subcontractors, scope, location, data access, certifications, and supplier diversity status. State whether any services or access to MetroHealth information will occur outside the United States. No offshoring may occur without prior written approval.

Conflicts, Insurance, and Contracting

Disclose organizational, financial, personal, or business conflicts relevant to MetroHealth and describe mitigation. Provide requested insurance, tax documentation, and exceptions to MetroHealth agreements and procurement terms.

Data Ownership and Portability

MetroHealth will retain ownership of its data. Describe export formats, completeness, metadata, relationships, attachments, encryption, assistance, timing, cost, certification, and deletion at contract end or transition to another provider.

Work Product and Intellectual Property

Identify ownership and licensing terms for extraction code, mappings, data models, configurations, reports, interfaces, documentation, training materials, runbooks, test assets, and other project work product. Identify any proprietary dependency that could limit MetroHealth operation or transition.

Auditability

Describe how project and production artifacts will support audit, records management, privacy review, legal requests, security review, change control, access certification, operational support, and final decommission certification.

XIX. Timeline and Critical Dates

Milestone	Date
RFP released	10/13/2026
Respondent questions due	10/19/2026
MetroHealth responses posted	10/21/2026
Proposals due	10/26/2026
Respondent presentations, if requested	11/2/2026 – 11/20/2026
Notice of intent to award	11/24/2026
Contract execution	TBD
Project kickoff	TBD
Planned Workday production go-live	January 2028
Archive pilot complete	Respondent to propose
Production historical archive available	Respondent to propose, but early enough to support validation before Lawson retirement



Lawson read-only transition	Respondent to propose, no earlier than July 1, 2028, unless otherwise approved by MetroHealth – Must accommodate year end processing and final GL close and Audit
Controlled shutdown and observation	Respondent to propose
Final decommissioning	Respondent to propose

Respondents must propose a detailed schedule aligned with Workday deployment and stabilization, financial and payroll cycles, audit requirements, data validation, historical-access readiness, and controlled decommissioning dependencies.

XX. Evaluation Criteria

Evaluation Factor
Quality and completeness of archive and decommissioning approach
Infor/Lawson technical and functional experience
Healthcare, compliance, records, and audit experience
Archive platform capability, usability, security, and support
Data extraction, validation, reconciliation, and reporting approach
Project team, methodology, timeline, and knowledge transfer
Commercial value, pricing transparency, and ten-year total cost
Supplier diversity, contract alignment, references, and proposal quality

A selection committee will review and evaluate all proposals. The decision of the selection committee will be final. All respondents will be notified of the selection once a final decision has been made. If you are requested to make an oral presentation, key members of the company should be prepared to discuss your solution. The competitive sealed proposal (“CSP”) timeframe is as follows:

- October 13, 2026: CSP opens at 8:00am ET
- October 14, 2026: Q&A opens at 8:00am ET
- October 19, 2026: Q&A closes at 5:00pm ET
- October 26, 2026: CSP closes at 1:00pm ET

Please submit questions and proposals through MetroHealth’s public bid website.

Demonstration Scenarios

- Search and retrieve a historical employee payroll result, including related earnings, deductions, taxes, and supporting detail, with access appropriate to the user role.
- Search and retrieve a supplier invoice, purchase order, receipt, payment, and associated document while preserving relational drill-through.
- Reproduce a historical general-ledger transaction and trace it to supporting source detail and archive lineage.



- Place a legal hold, demonstrate blocked disposition, release the hold, and show the complete audit trail.
- Demonstrate user provisioning, role-based restrictions, access logging, export controls, and access certification.
- Demonstrate validation dashboards or evidence, including counts, control totals, exceptions, and sign-off.
- Demonstrate backup recovery, contract-exit export, and deletion certification processes.

XXI. Attachment Reference

The following list of documents are incorporated into this CSP as attachments and should be addressed within your Proposal:

- A. Bid Instructions
- B. Bid Specifications
- C. Intent to Bid
- D. MetroHealth IT Architecture and Security RFP Questionnaire (please completed)
- E. Master Purchase Agreement
- F. Business Associate Agreement
- G. Software as a Service Agreement