

**AGENDA ITEM EXECUTIVE SUMMARY**

Agenda Item number: 5a

Title:

Recommendation to approve an agreement with Plante Moran to provide enterprise software selection consulting services

Presenters:

Larry Gunderson, Director of Information Systems
Michael Drake, Senior Systems Analyst

Meeting: Government Operations Committee

Date: March 4, 2019

Proposed Cost: \$196,940

Budgeted Amount: \$120,000

Not Budgeted: **Executive Summary** (if not budgeted please explain):

The City is at a crossroads regarding a number of its enterprise software applications. These systems include its core financials, procurement, human resources, enterprise asset management and utility billing, as well as several ancillary systems. As a result of a strategic review of the City's enterprise applications it was determined that each of the applications defined above need to be purchased, upgraded or replaced in the near future. These applications, along with their business processes, are also included in an overall strategy to simplify and consolidate the City's technology infrastructure and enterprise applications.

Due to the complexity, risk and costs associated with a project of this magnitude, staff recommends the utilization of an outside consultant to assist City staff through this process. The City developed a Request for Proposal for consulting services for this effort. The RFP scope of work includes:

- Conduct strategy sessions and interviews with department staff and City senior management
- Develop an approach for upgrading, replacing, and/or integrating the City's enterprise applications
- Consolidate existing needs assessments and software requirements
- Develop and release a Request for Proposal (RFP) to qualified vendors
- Facilitate software demonstrations
- Conduct discussions of findings with staff
- Provide guidance during contract negotiations

Plante Moran was selected for this engagement through an RFP process by a multi-departmental review team. Since it is likely that the software selection process will require two separate procurement processes, including vendor software demonstrations and contract negotiations, the project will be structured into two phases. Plante Moran has proposed a not-to-exceed cost of \$196,940 for both phases of the project.

Attachments (please list):

Enterprise Software Selection Consulting Services memorandum

Recommendation to approve an agreement with Plante Moran to provide enterprise software selection consulting services



Memo

Date: February 25, 2019
To: Alderman Todd Bancroft
Chairman of the Government Operations Committee
From: Larry Gunderson, Director of Information Systems
Re: Enterprise Software Selection Consulting Services

Purpose

This memorandum outlines the goals, objectives and process for entering into an agreement with a consultant to provide Enterprise Software Selection Consulting Services.

Background

The City is at a crossroads regarding a number of its enterprise software applications. These systems include its core financials, procurement, human resources, enterprise asset management and utility billing, as well as several ancillary systems. Following is an overview of each application:

Financial and Human Resources Management

The City has used Infor Lawson financial and human resource management software since 2011. The software supports the City's general ledger, procurement, accounts payable, accounts receivable, inventory, fixed assets, budgeting, employee benefits, payroll and human resources operations.

Enterprise Asset Management / Work Order

The City does not have a work order/enterprise asset management solution. Various disconnected solutions are currently being used for maintenance management, fleet management, service requests and citizen relationship management (CRM), including Microsoft SharePoint, CitySourced, CFA, etc.

Utility Billing

The City's Utility Billing system supports the requirements for billing residents and businesses for electric, water, wastewater, refuse, and yard waste collection

services. The City utilizes Paymentus as its customer portal and e-payment system.

Community Development

The City currently uses Harris CityView software for planning and zoning, permits, inspections, and code enforcement. The initial deployment took place in 2004 and the City is currently upgrading to CityView Workspace. Future application requirements include mobile applications, online permitting and email integration.

As a result of a strategic review of the City's enterprise applications it was determined that each of the applications defined above need to be purchased, upgraded or replaced in the near future. These applications, along with their business processes, are also included in an overall strategy to simplify and consolidate the City's technology infrastructure and enterprise applications.

In preparation for the Enterprise Software Selection Consulting Services project, the City developed needs assessments and software requirements for Enterprise Asset Management; Community Development; and Utility Billing/Customer Information System. Software requirements for Financials and Human Resources applications have also been developed.

Request for Proposal Development Process and Vendor Selection

Due to the complexity, risk and costs associated with a project of this magnitude, staff recommends the utilization of an outside consultant to assist City staff through this process. In September 2018 City staff developed a Software Selection Consulting Services RFP and distributed it to twelve vendors. The project scope defined in the RFP included assisting the City with development and release of one or more RFP(s) for its enterprise applications, to also include software selection assistance, including support with vendor negotiations.

Major project activities or deliverables include;

- Conduct strategy sessions and interviews with department staff and City senior management
- Develop an approach for upgrading, replacing, and/or integrating the City's enterprise applications
- Consolidate existing needs assessments and software requirements
- Develop and release a Request for Proposal (RFP) to qualified vendors
- Facilitate software demonstrations
- Conduct discussions of findings with staff
- Provide guidance during contract negotiations
- Facilitate a second RFP cycle, if necessary

The City received five RFP responses. A team of Public Works, Finance, Human Resources, and Information Systems personnel were invited to participate on the selection committee. All proposals received were evaluated based on the following criteria and weights (points):

Proposed Scope of Work	30
Company Experience & References	30
Personnel/Staffing Resources	30
Completeness and Presentation of Proposal	10
Total Possible	100

After a thorough review of the proposals by the selection team, three vendors were elevated and asked to provide an online presentation of their proposal to the committee. At the completion, utilizing the same scoring criteria, two vendors (BerryDunn and Plante Moran) were elevated and asked to visit the City to provide an onsite presentation. Using the same scoring criteria, Plante Moran was then chosen as the finalist.

Since it is likely that the software selection process will require two RFPs, vendor software demonstrations and contract negotiations, the project will be structured into two phases. Following are the costs proposed by each of the shortlisted consultants for Phase 1 and 2 of the project.

Consultant	Score	Phase 1 Cost	Phase 2 Cost	Total Cost
Plante Moran	74.6	\$117,605	\$79,335	\$196,940
BerryDunn	68.25	\$119,250	---	\$119,250
Baker Tilly	47.8	\$69,795	\$24,340	\$94,365

Phase 1 of the project is funded in FY 19. Phase 2 funding will be proposed for the FY 21 budget. The total project cost is \$196,940.

Recommendation

Staff recommends approval of an agreement with Plante Moran to provide Enterprise Software Consulting Services for a not-to-exceed cost of \$196,940.