



**Request for Proposal (RFP)
For Project Management Services for ERP
Implementation**

**Issued by:
City of Powell, Ohio
Finance Department
47 Hall Street
Powell, Ohio**

**Proposals must be submitted
On or before 2:00 PM (EST) 9/17/18**

**Late Proposals will be rejected
There will not be a public opening for this proposal**

**For more information regarding this RFP,
contact Debra Miller, Finance Director
at (614) 885-5380 extension 1053
Email: dmiller@cityofpowell.us**

Issued: 8/6/2018

1. General Information

1.1 Introduction

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for project management services to implement a new software that will encompass financial, budgeting, human resources and payroll functions.

The City of Powell as represented by the Finance Department intends to use the results of this Request for Proposal (RFP) to award a contract for the above listed project. The contract administrator will be determined at the time of the contract award. Retain a copy of these proposal documents for your files since should you receive the award, these documents will become part of the contract terms and conditions.

1.2 Definitions

The following definitions are used throughout the RFP:

Contractor means proposer awarded the contract.

City means the City of Powell.

Proposer/Vendor/Bidder means a company or individual submitting a proposal in response to this RFP.

State means the State of Ohio.

1.3 Scope

1.3.1. Project Description and History

In 2016, the City was preparing to gather information on its first human resource software package when it began to experience glitches in its budgeting and financial package. In 2017, the City's Finance Committee authorized the Finance Director to begin looking for a project manager and software package for all its needs.

The City employs 48 individuals in a wide range of positions performing a range of services including: maintaining streets, providing public safety services, operating parks, residential and commercial permitting and inspections and a variety of programs and services for City residents. This project focuses on the administrative functions affecting the staff in all of these occupations.

Currently, the City relies heavily on excel spreadsheets to subsidize its finance and payroll software package. The City has used this finance and payroll package for over fifteen years.

The City seeks to implement a new software package and to limit the amount of modifications to the base application. It is the City's plan to take the 2019 year for implementation since the City would also like to add/change its chart of accounts, implement many of the excel spreadsheets into the software and rethink its business processes.

1.3.2 Objective/Need

The City requires professional project management services from a highly skilled individual(s) to keep the software implementation and training process on task and on budget. The project manager shall write the RFP for software with the assistance of the City, assist the City in reviewing the RFP responses including implementation and training plans, and advise the City on implementation challenges and opportunities. The scheduled award date of the software is approximately January/February 2019 with implementations beginning in the spring of 2019. The schedule is subject to change.

Organized management of the implementation is critical to the success of the project. The project manager shall be responsible for achieving effective communication between the awarded provider and the City.

The City expects the implementation to be conducted in stages in cooperation with the awarded provider and the City. The City will look at fixed amount contract based on completed phases.

The City expects much of the work to be completed onsite and shall provide work space and office machine usage for the Project Manager to use at the Village Green Municipal Building, 47 Hall Street, Powell, OH 43065.

1.3.3 About the City of Powell

The City's location in southern Delaware County has promoted its development as a semi-rural, suburban, greenbelt town. The City is a suburb of Columbus, Ohio, the state capital. The City encompasses approximately 6 square miles and has a population of 13,000. The City has an operating budget of roughly \$8 million annually.

The City is one of the fastest growing areas in Ohio for over the last ten years and Central Ohio in 2018 was listed as the second fastest growing area in America.

The City's Finance Department is currently a three (3) person operation with no ability for other departments to view, enter, modify, route or approve information in the financial system.

1.3.4 Clarifications and/or Revisions to this RFP

The Finance Department is the sole point of contact for the City during the selection process. Contact with anyone else involved with this process without the prior authorization of the Finance Department may result in the disqualification of your proposal. Proposers are expected to raise any questions, noted errors, discrepancies, ambiguities, exceptions, additions, or deficiencies they have concerning this proposal in writing through email by September 15, 2018, to: Debra Miller, Finance Director, Email: dmiller@cityofpowell.us

If the proposer fails to notify the City prior to the proposal due date of any condition stated above that reasonably should have been known to the

proposer, and if a contract is awarded to that proposer, the proposer shall not be entitled to additional compensation or time by reason of the error or its correction.

Revisions to this request for proposal or answers to questions will be made only by an official written addendum issued by the Finance Department. Addenda will be posted on the City's website. Proposers are responsible for checking the website for any addenda before submitting a proposal. Failure to acknowledge addenda may disqualify your proposal.

City website: <https://cityofpowell.us>

1.4 Calendar of Events

Listed below are specific and estimated dates and times of actions related to this Request for Proposal. The actions with specific dates must be completed as indicated unless otherwise changed by the City. In the event that the City finds it necessary to change any of the specific dates and times, it will do so by issuing an addendum to this RFP.

Milestone	Date
Release RFP to Vendors	August 6, 2018
Vendor Questions (if any) Due	August 24, 2018
Answers to RFP Questions Released	August 31, 2018
Proposal Responses Due From Vendors	September 17, 2018 2:00 p.m. EST
Finalists selected; invitations to demonstrate with scenarios to guide	October 26, 2018
Finalist Vendor Demonstrations	November 13 – 14, 2018
Notification of Intent to Award	December 1, 2018
Vendor Selection	December 1, 2018
Contract Negotiations	To be determined
Phase work completed	To be determined
Final Acceptance	To be determined

1.5 Contract Term and Funding

The contract shall be effective on the date indicated on the contract. The City may extend the contract for additional time to complete the project if required.

2. Preparing and Submitting a Proposal

2.1 General Instructions

The evaluation and selection of a contractor will be based on the information submitted in the proposal plus references and any required on-site visits, interviews/presentations or demonstrations. Proposers should respond clearly and completely, to all requirements. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a proposal.

Elaborate proposals (e.g. expensive artwork), beyond that sufficient to present a complete and effective proposal, are not necessary or desired. The City encourages all proposers to email their submission to save paper.

2.2 Incurring Costs

The City is not liable for any cost incurred by proposers in replying to this RFP.

2.3 Submitting Proposals

Proposers must submit either (a) in a sealed package, one original (identify) plus three copies of all materials or (b) email a complete package to dmiller@cityofpowell.us of all materials required for acceptance of their proposal on or before 2:00 p.m., EST on 9/17/18 to:

City of Powell Finance Department
Attn: RFP Submittal
47 Hall Street
Powell, OH 43065

Email submittals must use the subject line to state "RFP Submittal".

All proposals must be received by the Finance Department by the stated time. Late proposals will not be accepted. Receipt of the proposal by the U.S. mail system does not constitute receipt of the proposal by the Finance Department.

COST PROPOSAL: Submit separately from the proposal package. The outside of the envelope or the email subject line should clearly read "Cost Proposal" instead of "RFP Submittal".

2.4 Proposal Organization and Format

Written proposals should be submitted on 8.5 by 11 inch paper and bound securely with page numbers clearly indicated. Email proposal should be submitted .pdf with page numbers clearly indicated.

Section 1 – Cover Letter, RFP Signature pages: Include here any cover letter, Attachment A – RFP Signature page, and any addenda signature pages.

The Signature page submitted in response to this RFP must be signed by the person in the proposer's organization who is responsible for the decision as to the prices being offered or by a person who has been authorized in writing to act as agent for the person responsible for the decision on prices and services. Failure to provide these forms/information with your bid submittal may disqualify your proposal.

Section 2 – Response to Proposer Information and Solutions: Responses to the requirements in the proposer information and solutions must be organized in the same sequence as they appear in this RFP. Also, include in this section any references.

Section 3 – Mandatory Requirements: Include your responses to mandatory requirements.

Separate envelope or email – Cost Proposal: Provide cost information as detailed in Section 6 in this RFP. All costs, as requested, for furnishing the product(s) and/or service(s) must be included in this proposal. Costs not listed in

the proposal are not agreed to and will not be paid unless the City and the proposer sign an addendum to the contract before the costs are incurred.

- 2.5 **Multiple Proposals**
Multiple proposals from a proposer are permissible; however each proposal must conform fully to the requirements for proposal submission. Each proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc.
- 2.6 **Withdrawal of Proposals**
Proposals shall be irrevocable until contract award unless the proposal is officially withdrawn. Proposers may withdraw a proposal, in writing, at any time up to the proposal due date and time or upon expiration of 90 days after the due date and time. The written withdrawal notice must be received by the Finance Department. The notice must be signed by an authorized representative of the proposer. If a previously submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the proposal due date and time.

3. Proposal Selection and Award Process

- 3.1 **Evaluation Committee**
The City will put together a committee of various staff members and the City Council's Finance Committee who have expertise and knowledge of the service(s) and/or product(s) that are the subject of this RFP. Proposer may not contact members of the evaluation committee.
- 3.2 **Preliminary Evaluation**
The proposals will be initially reviewed to determine if the mandatory requirements are met. Failure to meet mandatory requirements shall result in the proposal being rejected. In the event that all proposers do not meet one or more of the mandatory requirements, the City reserves the right to continue the evaluation of the proposals that most closely meet the mandatory requirement of the RFP.
- 3.3 **Right to reject proposals**
The City reserves the right to reject any and all proposals.
- 3.4 **Proposal Scoring**
Accepted proposals will be reviewed by the evaluation committee and scored against stated criteria. The committee may review references, request interviews/presentations, conduct demonstrations and/or conduct on-site visits. The resulting information will be used to score the proposals. The evaluation committee's scoring will be tabulated and proposals ranked based on the numerical scores received.
- 3.5 **Evaluation Criteria**
The proposals will be scored using the following criteria:

Description	Points
Organization Capabilities	200
Staff Qualifications	200
Proposer Solutions	400
Cost Proposal	200
Total	1000

- 3.6 Interviews/Presentations and/or Site Visits
Top-scoring proposers, based on the evaluation of the written proposal, may be required to have interviews/presentations to support and clarify their proposals, if requested by the City. The City will make every reasonable attempt to schedule the interview/presentation on the date specified in the calendar of events. Failure of a proposer to complete a scheduled interview/presentation to the City may result in rejection of that proposer’s proposal. The City may conduct site visits of references’ facilities to clarify or confirm proposal information.
- 3.7 Final Evaluation
Upon completion of any interviews/presentations and/or demonstrations by proposers, the City’s evaluation team will review their evaluations and make adjustments to the scores based on the information obtained in the interview/presentation, demonstration, possible reference checks, and any other pertinent proposer information.
- 3.8 Award and Final Offers
Award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible proposer after the evaluation process is completed. Alternatively, the highest proposer or proposers may be requested to submit best and final offers. If the City requests best and final offers, they will be evaluated against the stated criteria, scored, and ranked by the evaluation committee. The award will then be granted to the highest scoring proposer following that process.
- 3.9 Notification of Intent to Award
All proposers who respond to this RFP will be notified of the City’s intent to award the contract(s) as a result of this RFP.
- 3.10 Appeals Process
Notices of intent to protest and protests must be made in writing. Protestors should make their protests as specific as possible and should identify Ohio Statutes or City of Powell Ordinance provisions that are alleged to have been violated.
- The written notice of intent to protest the intent to award a contract must be filed with Debra Miller, Finance Director, City of Powell, 47 Hall Street, Powell, Ohio 43065, and received in her office no later than five (5) working days after the notice of intent to award is issued. The written protest must be received in her office no later than ten (10) working days after the notice of intent to award is issued.
- 3.11 Negotiate Contract Terms

The City reserves the right to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the City may negotiate a contract with the next highest scoring proposer.

4. Requirements

4.1 Mandatory Requirements

The following requirement(s) are mandatory and the proposer must satisfy them as a pass/fail pre-screening requirement. Any submissions not in compliance with mandatory requirements may be rejected and not evaluated or scored.

4.1.1 Risk Management – Insurance Requirements for Consultants (professional services)

- a. The proposer shall have Errors and Omissions coverage in the minimum amount of \$1,000,000 and shall be in effect for the entire period of the project and for a minimum of one year after completion of said project.
- b. Full Worker's Compensation coverage for all persons who they may employ, and shall hold the City free and harmless for all personal injuries.
- c. The proposer shall have property insurance for protection from claims for damages because of damage to or destruction of proposers' property including loss of use resulting therefrom. The City shall be held harmless for any damage to the proposer's property and/or equipment during the course of executing the contract.
- d. The proposer shall have general liability coverage in the minimum amount of \$1,000,000 per occurrence.
- e. The proposer shall have automobile insurance including coverage for non-owned and hired autos with a combined single limit of not less than \$1,000,000 per occurrence.
- f. The City shall be named as an "additional insured" on all insurance coverage except Worker's Compensation and Errors & Omissions.
- g. Proposer's required insurance shall be endorsed to provide that the policy(ies) will not be canceled, reduced, discontinued, or otherwise materially altered during the period of performance without thirty (30) days prior written notice to the City.

4.1.2 Accounting

- a. The proposer shall include IRS form W-9, Request for Taxpayer Identification Number and Certification that has been completed and signed.
- b. Ohio Public Employee Retirement System (OPERS) Independent Contractor/Worker Acknowledgment form if the proposer is an individual. All proposers who are companies need to provide a statement stating they have reviewed the form and it is not applicable to them.

4.2 Contract Requirements

The awarded contractor is expected to fulfill the following contract requirements.

- 4.2.1 Provide professional project management services to successfully implement new software for the City.

- 4.2.2 Assist the City in developing an implementation and training schedule with the awarded software provider. Expedite the implementation plan and training to keep the project on schedule.
- 4.2.3 Provide and manage effective and timely communication between the software provider and the City.
- 4.2.4 Schedule and supervise training to be conducted by the software provider.
- 4.2.5 Work with a variety of departments to develop business processes and procedures for approval by the City.
- 4.2.6 Provide monthly reports and updates to the City Evaluation and Finance Committee as necessary.
- 4.2.7 Change management – The City has utilized our current software and procedures for a number of years. The new software will dramatically change how the City conducts business. The Proposer shall assist City staff in effective change management during the implementation and training process in order to create a smooth transition.
- 4.2.8 Work environment – Much of the work on this project will be conducted onsite and in person. The City will provide work space including furniture, office supplies, internet connection, City email address (if needed), and access to our network and printers/copiers. The proposer shall supply the computer/laptop, business software, and antivirus protection. It is anticipated that evening and possible weekend work may be required.

5. Proposer Information and Solutions

(Submit response under Section 2 of proposal)

- 5.1 **Organization Capabilities**
Describe the organization/company's experience and capabilities providing software (ERP) implementation to government agencies, including ones of similar size. Be specific and detail no more than five projects/contracts; description of work, dates, locations, challenges and results.
- 5.2 **Staff Qualifications**
Identify key staff your organization/company will assign to fulfill the contract requirements. Detail what roles each would have. Provide a synopsis describing the educational and work experience for each key staff who would be assigned to the project/program with a focus on experience with similar size and scope. Detail the number of hours for each key staff member that you estimate will be needed to fulfill the project needs.
- 5.3 **Proposer Information**
 - 5.3.1 Describe your approach to meet the needs of the project scope and requirements. Describe your general philosophy regarding project

management, specifically when managing government projects of similar size and scope. Give specific examples of techniques that have proven successful and for which projects and agencies they were used.

- 5.3.2 Detail your firm's understanding of the challenges and barriers of implementing an ERP system for a government agency of our size and proposed approach to overcome these barriers.
- 5.3.3 Describe your method and experience with change management while implementing a government project of this size and scope. What specific skills and techniques does your proposed Project Manager(s) possess to assist City staff with the changes that will occur with implementation?
- 5.3.4 Describe the proposed Project Manager's experience and skills working cooperatively with vendors and other consultants on a project of this size and scope.
- 5.3.5 Describe the Project Manager's schedule availability to work on the project and flexibility to provide the needed services throughout the project.
- 5.3.6 Has the proposer had a contract terminated for default during the past five years, all such incidents must be described. Termination for default is defined as notice to stop performance due to the proposer's nonperformance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined the vendor to be in default. Present the vendor's position on matter.

If no such terminations for default have been experienced by the vendor in the past five year, declare so.

If the vendor has had a contract terminated for convenience, nonperformance, non-allocation of funds, or any other reason which termination occurred before completion of the contract during the past five years, describe fully all such terminations.

A vendor response that indicates that the requested information will only be provided if and when the vendor is selected as the apparently successful vendor is not an acceptable response.
- 5.3.7 Provide copies of your standard contract terms.
- 5.3.8 Provide an example of a similar size and scopes project schedule and readiness timeline.
- 5.4 Proposer References
Proposer must supply references and contact information of three firms/agencies to which similar projects/service have been provided within the past five years to a comparable sized institution or company.

6. Cost Proposal

- 6.1 General Instructions for the Cost Proposal and how it will be Scored
(All prices must be quoted in U.S. Dollars).

The Finance Department will score the cost proposals by prorating with the lowest cost proposal given the highest score. The formula is as follows:
Calculation of points awarded to subsequent proposals will use the lowest dollar proposal amount as a constant numerator and the dollar amount of the firm being scored as the denominator. This number is then multiplied by the number of points given to the cost section of the RFP, resulting in the cost proposal score.

$$\frac{\text{Lowest Cost Proposed (Constant)}}{\text{Your Proposed Cost}} \times \text{Maximum Points Assigned to Cost} = \text{Score}$$

- 6.2 Fixed Price Period

The awarded contractor must hold the accepted prices and/or costs for the entire contract period. Costs or difference prices are not agreed to and will not be paid unless the City and the proposer sign an addendum to the contract before any work is completed or a new contract is awarded.