

EXHIBIT B  
PUR-3 EX. 2  
Additional Attachments

{Get there.}

CITY OF FORT LAUDERDALE, FLORIDA | JULY 3, 2013

plante  
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moran

audit • tax • consulting

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# 1. Bid/Proposal Signature Page

## BID/PROPOSAL SIGNATURE PAGE

**How to submit bids/proposals:** Proposals must be submitted by hard copy only. It will be the sole responsibility of the Bidder to ensure that the bid reaches the City of Fort Lauderdale, City Hall Procurement Services Division, Suite 619, 100 N. Andrews Avenue, Fort Lauderdale, FL 33301, prior to the bid opening date and time listed. Bids/proposals submitted by fax or email will NOT be accepted.

The below signed hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement and conditions contained in the bid. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the CITY and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

**Please Note:** All fields below **must** be completed. If the field does not apply to you, please note N/A in that field.

Submitted by: E. Scott Eiler July 3, 2013  
(signature) (date)

Name (printed) E Scott Eiler Title Partner

Company: (Legal Registration) Plante & Moran, PLLC

**CONTRACTOR, IF FOREIGN CORPORATION, MAY BE REQUIRED TO OBTAIN A CERTIFICATE OF AUTHORITY FROM THE DEPARTMENT OF STATE, IN ACCORDANCE WITH FLORIDA STATUTE §607.1501 (visit <http://www.dos.state.fl.us/>).**

Address: 27400 Northwestern Hwy.

City: Southfield State: MI Zip: 48034

Telephone No. 248-223-3447 FAX No. 248.233.8587 Email: Scott.Eiler@plantemoran.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions):

Payment Terms (section 1.04): Net 30 Total Bid Discount (section 1.05): N/A

Does your firm qualify for MBE or WBE status (section 1.09): MBE N/A WBE N/A

**ADDENDUM ACKNOWLEDGEMENT** - Proposer acknowledges that the following addenda have been received and are included in the proposal: (see Tab 10)

<u>Addendum No.</u>	<u>Date Issued</u>
1	June 4, 2013

**P-CARDS: Will your firm accept the City's Credit Card as payment for goods/services?**

YES \_\_\_\_\_ NO X

**VARIANCES:** State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. **HAVE YOU STATED ANY VARIANCES OR EXCEPTIONS BELOW? BIDDER MUST CLICK THE EXCEPTION LINK IF ANY VARIATION OR EXCEPTION IS TAKEN TO THE SPECIFICATIONS, TERMS AND CONDITIONS.** If this section does not apply to your bid, simply mark N/A in the section below.

Variations:

None noted

revised 11-29-11

## 2. Required Documents

### NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and free from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

<u>NAME</u>	<u>RELATIONSHIPS</u>
_____	_____
_____	_____
	_____
	_____

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

E. Scott Eiler                      July 3, 2013

E. Scott Eiler, Partner                      Date

**ATTACHMENT "E"**  
**LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT**

The Business identified below certifies that it qualifies for the local BUSINESS preference classification as indicated herein, and further certifies and agrees that it will re-affirm it's local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this RFP. Violation of the foregoing provision may result in contract termination.

- (1) \_\_\_\_\_  
Business Name is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and their addresses shall be provided within 10 calendar days of a formal request by the City.
- (2) \_\_\_\_\_  
Business Name is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Business Tax Receipt or a complete list of full-time employees and their addresses shall be provided within 10 calendar days of a formal request by the City.
- (3) \_\_\_\_\_  
Business Name is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
- (4) \_\_\_\_\_  
Business Name requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (5) \_\_\_\_\_  
Business Name requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (6) \_\_\_\_\_  
Business Name is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. and does not qualify for Local Preference consideration. (Notary not required for Class "D")

PROPOSER'S COMPANY: Plante & Moran, PLLC

AUTHORIZED COMPANY PERSON:	<u>E. Scott Eiler</u>	<u><i>E. Scott Eiler</i></u>	<u>July 3, 2013</u>
	NAME	SIGNATURE	DATE

STATE OF Michigan  
COUNTY OF Oakland

The foregoing instrument was acknowledged before me this 3<sup>rd</sup> day of July, 2013, by E. Scott Eiler and \_\_\_\_\_ as \_\_\_\_\_ and \_\_\_\_\_ respectively, of Plante & Moran, PLLC. They are  personally known to me or  have produced \_\_\_\_\_ as identification.

(SEAL)

*Faith de Manincor*  
Notary Public, State of Michigan  
(Signature of Notary taking Acknowledgment)

FAITH de MANINCOR  
Name of Notary Typed, Printed or Stamped

My Commission Expires: April 15, 2014  
Commission Number: \_\_\_\_\_

FAITH DE MANINCOR  
NOTARY PUBLIC, STATE OF MI  
COUNTY OF OAKLAND  
MY COMMISSION EXPIRES Apr 15, 2014  
ACTING IN COUNTY OF Oakland



**CERTIFICATE OF LIABILITY INSURANCE**

OP ID#K

DATE (MM/DD/YYYY)

04/05/11

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s)**

PRODUCER Cambridge Underwriters Ltd. P. O. Box 511077 Livonia MI 48151-7077 Phone: 734-525-0927 Fax: 734-525-0612	CONTRACT NUMBER PLANET-5
	PRODUCER'S ADDRESS FEDERAL INSURANCE COMPANY 20281
INSURED P&H Holding Group, LLP and Subsidiaries Plante & Moran, PLLC 26300 Northwestern Hwy, Ste 120 Southfield MI 48034	INSURED'S ADDRESS 20346
	INSURER A: INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:

**COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED. THE INSURED/PRODUCER IS RESPONSIBLE FOR THE POLICY. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, CONDITIONS AND COORDINATIONS OF EACH POLICY. LIMITS SHOWN MAY HAVE BEEN REDUCED BY THIS CLAIM.

LINE	TYPE OF INSURANCE	ADDL. END.	BASE END.	POLICY NUMBER	POLICY EXP. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY			3575-66-13	03/13/11	03/13/12	EACH OCCURRENCE
	COMMERCIAL GENERAL LIABILITY						\$ 1,000,000
	CLAIMS MADE		<input checked="" type="checkbox"/> EXCLUS				\$ 1,000,000
	GENS. AGGREGATE LIMIT (PER POLICY PER)						\$ 10,000
A	APPROPRIABLE LIABILITY			7326-30-17	03/13/11	03/13/12	CLAIMED SINGLE LIM (PER OCCUR)
	EMP ALTD						\$ 1,000,000
	ALL OWNED AUTOS						\$ 500 COMP
	NON-OWNED AUTOS						\$ 500 COLL
A	UMBRELLA LIA			7983-33-30	03/13/11	03/13/12	EACH OCCURRENCE
	EXCESS LIA		<input checked="" type="checkbox"/> EXCLUS				\$ 1,000,000
	AGGREGATE						\$ 1,000,000
	AGGREGATE						\$
B	EMPLOYEE COMPENSATION AND EMPLOYER LIABILITY			7165-30-87	03/13/11	03/13/12	PER ACCIDENT
	ANY EMPLOYER PARTICIPATING IN A PLAN						\$ 1,000,000
	PER OCCUR						\$ 1,000,000
	PER OCCUR						\$ 1,000,000

DESCRIPTION OF OPERATIONS (LOCATION): REPRODUCED FROM ACORD 25. Additional Services: ERP needs assessment and selection consulting services. The City of North Miami Beach is included as an additional insured for commercial general liability coverage per the attached form #80-02-2373.

<b>CERTIFICATE HOLDER</b>  City of North Miami Beach Attn: Alicia Lafarga 17011 NE 19th Ave, Suite 315 North Miami Beach FL 33162	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE
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### 3. Letter of Interest

July 3, 2013

Mr. Richard Ewell, Procurement Specialist II  
City of Fort Lauderdale  
Procurement Services Division  
100 N. Andrews Avenue, Room 619  
Ft. Lauderdale, FL 33301

Dear Mr. Ewell:

Plante Moran, PLLC (Plante Moran) is pleased to provide our qualifications to the City of Fort Lauderdale to provide Enterprise Resource Planning (ERP) Consulting Services. We are very excited about the possibility of working with the City on this very important project.

We understand that the City's current financial management system lacks integration with other City applications and is unable to support a mobile and e-government environment that the City desires. This contributes to less than optimal processes and functionality to provide the organizational performance and reporting capability management that the City is expecting. Having served numerous counties, villages and cities with similar initiatives, our proposed project team understands the complexities involved with evaluating and replacing legacy systems in favor of a more fully integrated solution that takes advantage of current enabling technologies.

Plante Moran is uniquely qualified to assist the City on this important project. We offer the following benefits:

- Complete independence from all governmental ERP software providers allows us to assist in selecting a system that best meets the needs of the client. Through our numerous system selection projects, we have gained significant experience and knowledge of providers of ERP software solutions for governmental entities and the pros/cons of each solution.
- Proven methodology and approach, based on 30 years of ERP experience with governmental clients including all aspects of needs assessment, selection, contract negotiations, statement of work development and implementation management assistance.
- Significant and recent experience in performing ERP system needs assessment, solution selection, contract negotiation, planning, and implementation projects that have involved all aspects of operations for municipal clients including:
  - City of Columbia, MO
  - Muskegon County, MI
  - Horry County, SC
  - City of Cleveland, OH
  - St. Louis County, MO
  - City of Asheville, NC
  - City of Mesa, AZ
  - City of Corpus Christi, TX

Currently, our municipal practice has 16 ERP procurement and 5 ERP implementation projects underway at various stages that includes nearly all of the ERP vendors that will likely be considered by the City.

PROPOSAL TO PROVIDE ENTERPRISE RESOURCE PLANNING CONSULTING

- Strong knowledge of the Tier 2 ERP vendor community through direct visits by these vendors, participation in association activities such as GFOA and through continual involvement in performing ERP selection projects for other municipal client
- Significant and recent experience in performing ERP selection projects for Florida municipal clients either through open competitive bids or through the use of piggybacking to include:
  - Broward County
  - City of Hallandale Beach
  - City of North Miami Beach
  - City of Miramar
  - Town of Jupiter
  - City of Cooper City
  - City of Oakland Park
  - City of Pinellas Park
- A strong project team, blending public sector systems, process, best practices, and re-engineering expertise.
- We have successfully negotiated contracts with nearly all of the software vendors that the City will likely be considering. Through our negotiations process, we have been able to save our clients significant costs and negotiate terms which protect the interests of our clients.
- Our project professionals are members of national and local organizations dedicated to improving the financial and technology operations of local government including GFOA, ICMA, PTI and GMIS as well as participation in the recent Florida GFOA conference.
- Significant experience conducting process redesign and making process improvement recommendations for municipal clients during the implementation of new ERP systems.
- Significant experience developing strategic technology plans for local governmental clients allow us to provide further insight into the uses of enabling technology and systems by our municipal clients.
- As accountants and advisors to nearly 200 government agencies, our Firm is well recognized as one of the leading providers of independent, objective advice.

Our proposed team blends the technology and municipal operations knowledge with seasoned management consultants to work on this important initiative. We believe that based upon these experiences and the quality of our proposed team, we are well qualified to provide objective and comprehensive ERP Acquisition consulting services for the City of Fort Lauderdale.

We would also strongly your team to contact any of our current or past clients. If you have any questions concerning this proposal or need to contact any of the project team members, please contact me at 1-800-544-0203. This proposal is valid for 120 days from the proposal response date. We also acknowledge receipt and review of Addendum 1.

Very Truly Yours,  
PLANTE & MORAN, PLLC



E. Scott Eiler, Partner  
27400 Northwestern Highway  
Southfield, MI 48037  
1-800-544-0203  
Scott.Eiler@plantemoran.com



## 4. Business Licenses

### *State of Florida Department of State*

I certify from the records of this office that PLANTE & MORAN PLLC is a Michigan limited liability company authorized to transact business in the State of Florida, qualified on May 9, 2011.

The document number of this limited liability company is M11000002358.

I further certify that said limited liability company has paid all fees due this office through December 31, 2013, that its most recent annual report was filed on March 26, 2013, and its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-eighth day of June,  
2013*



*Ken Peterson*  
**Secretary of State**

Authentication ID: CU9288183313

To authenticate this certificate, visit the following site, enter this ID, and then follow the instructions displayed.

<https://efile.sunbiz.org/ceertauthver.html>

## 5. Qualifications and Experience

1. Describe the Proposer's form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, Limited Liability Company) and detail the name, mailing address, and telephone number of the person the City should contact regarding the proposal.

Plante Moran, PLLC is a limited partnership, owned and operated by its partners. The primary contact for this engagement is Mr. E. Scott Eiler. His full contact information is:

E. Scott Eiler  
27400 Northwestern Highway  
Southfield, MI 48037  
248.223.3447  
Scott.Eiler@plantemoran.com

2. Provide a statement of whether there have been any mergers, acquisitions, or sales of the Proposer company within the last ten years, and if so, an explanation providing relevant details.

Plante Moran has completed several successful mergers during the past ten years in order to better serve our clients and expand our practice in strategic geographic areas. These mergers were as follows, in reverse chronological order:

- 2012 – Blackman Kallick
- 2009 – Jackson, Rolfes, Spurgeon & Co. (JRS)
- 2005 – BKR Dupuis & Ryden
- 2004 – Gleeson, Sklar, Sawyers and Cumpata (GSSC)

3. Provide a statement of whether the Proposer or any of the Proposer's employees, agents, independent contractors, or subcontractors have been convicted of, pled guilty to, or pled nolo contendere to any felony, and if so, an explanation providing relevant details.

None of our project staff, or other employees at Plante Moran, have been convicted of, pled guilty to, or pled nolo contendere to any felonies.

4. Provide a statement of whether there is any pending litigation against the Proposer; and if such litigation exists, an attached opinion of counsel as to whether the pending litigation will impair the Proposer's performance in a contract under this RFP.

Plante Moran takes great pride in the quality of services it provides to its clients. We have a rigorous set of quality controls designed to provide assurance that professional standards are followed and our clients receive a high quality product. Nevertheless, claims are filed from time to time. We believe the number of claims filed against Plante Moran is well below industry averages for a firm of our size. Moreover, we take great pride in the fact that the firm has never, in its history, been adjudicated as negligent in a matter involving accounting, audit or consulting services. Plante Moran has not at any time been the subject of any action by a regulatory agency. There are no claims currently pending of any kind that could have material impact on the firm nor have there ever been claims filed that are associated with the services that will be providing to the City.

5. Provide a statement of whether, in the last ten years, the Proposer has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.

Plante Moran has never filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors

6. Provide a statement of Proposer's experience and qualifications. Should include the number of years the proposer has been providing similar services.

Plante Moran has been providing ERP software selection and implementation consulting services to governmental clients for the last thirty years. We provide the full-range of services related to the planning for, selection, contract negotiations and implementation of new technologies and processes for municipal governmental software. These experiences have included ERP modules and processes relevant to all organizational components of a municipal operation for both process owners and end-users.

Through these experiences we have been able to derive best practices associated with ERP system functional requirements, processes and technologies that, taken together, maximize the value that can be delivered to stakeholders within and external to the City. Additionally, our ability to negotiate contracts that maximize value for the client both financially and relative to terms and conditions is well-recognized. Our contract negotiation capabilities frequently generate savings well in excess of our fees on the project.

The following matrix identifies desired consultant capabilities, skills and core competencies required as part of this engagement and how our firm matches up against these criteria:

Required Capabilities	Plante Moran Match
1) Experience with governmental systems and implementations with a scope similar to the City's size of project.	Our firm has been involved in assisting governmental clients in the selection and implementation of ERP solutions for over 30 years including clients of comparable size and complexity to the City.
2) Strong written and oral communications skills that engage the entire team and maintain efficient communications and decision-making throughout the engagement. The City requires candidates with experience giving technical or executive presentations and practicing disciplined documentation throughout the entire process.	All of the senior staff assigned to the project regularly communicate with Councils, Commissions and Boards and senior management within governmental organizations either as part of the facilitation of projects for the client or in giving oral presentations presenting the results of a project.
3) Ability to form effective working relationships with management, supervisory, operational, and technical personnel from the City, other involved vendors, and any other stakeholders engaged in the success of this project.	Our selection process is a very participatory one that includes senior management, technical staff, operational staff, outside vendors and other relevant stakeholders. We are very adept at working with all of these constituencies.

<b>Required Capabilities</b>	<b>Plante Moran Match</b>
4) Ability to take direction and then work without immediate supervision to stay focused on meeting the City's requirements with high satisfaction.	Our team includes staff that are experienced and self-motivated requiring little direction while able to lead the project or phases they are responsible for.
5) Demonstrate a willingness to implement innovative program and project management methodologies, approaches and tools.	We regularly look for innovative ways in which to deliver our services in a more efficient and effective manner through the use of newer technologies and methods. For example, as a standard part of all projects performed we provide a collaboration center (e.g. MS SharePoint) in which to manage all activities on the project that is accessed by the client and our team.
6) Highly disciplined, focused leader, who can effectively assess project risk and take action to mitigate risks.	Staff assigned to the project are experienced in these types of projects and use project management methods including regular assessment of project risk. Furthermore, our significant experience in the selection and implementation of ERP solutions has resulted in our ability to identify risks common to these types of projects, early in the project.
7) Ability to consistently meet deadlines while exercising strong project and fiscal controls.	Our staff are committed to meeting deadlines that are established by the client for an engagement while meeting both quality and fiscal controls.
8) Professional behavior and appearance.	Plante Moran has a very rigorous hiring process to ensure that there is a fit between the individual and the core values of the firm that stress services to the client in a professional manner.
9) Ability to provide clear direction to multiple stakeholders and hold them accountable for producing the required results.	At the start of the project, we engage the various stakeholders on the project that will be required to provide input during the process to articulate what we will need from them and when. This information is captured in a Project Charter that is developed at the start of the project.
10) Passion for escalating issues appropriately to ensure quick problem resolution.	The process used on our projects ensures that any outstanding issues are quickly escalated such that delays in the project do not occur. This escalation process is defined during the early stages of the project. Furthermore, we will regularly conduct project reviews with client management to identify and discuss outstanding issues and risks.

**Required Capabilities**

**Plante Moran Match**

11) Proven ability to organize large projects, structure the processes for change management, risk management and project controls.

Our staff is adept on the various aspects of managing and delivering large-scale information technology projects within the public sector. We are well aware of both the technical and organizational challenges in implementing a new ERP and regularly counsel our clients on various dimensions and related to the fact that implementing a new ERP will affect people, process and technology.

**ERP Related Projects**

The following list provides a sampling of the municipal ERP projects that our firm has performed over the last several years.

<b>Client Name</b>	<b>Project Title</b>	<b>Project Date</b>
City of Pinellas Park, FL	ERP Selection	May 2013 – Present
City of Detroit, MI	ERP Needs Assessment	May 2013 – Present
Village of Woodridge, IL	ERP Selection	May 2013 – Present
City of Pueblo, CO	ERP Due Dilligence and Implementation Management Assistance	Mar 2013 – Present
Cape Fear Public Utility Authority, NC	ERP Needs Assessment	Mar 2013 – Present
Village of Northbrook, IL	ERP Selection	Mar 2013 – Present
New Braunfels Utilities, TX	ERP Needs Assessment and Selection	Dec 2012 – Present
City of Grand Rapids, MI	ERP Needs Assessment and Selection	Nov 2012 – Present
County of Sumner, TN	ERP Needs Assessment and Selection	Aug 2012 – Present
City of Ann Arbor, MI	HR/Payroll Software Assessment	Jul 2012 – Dec 2012
City of Corpus Christi, TX	ERP Selection	Jul 2012 – June 2013
Town of Jupiter, FL	Utility Billing and Enterprise Assessment Management Software Selection	May 2012 – Nov 2012
City of Hallandale Beach, FL	ERP Selection	May 2012 – Present
City of Columbia, MO	ERP Needs Assessment and Selection	May 2012 – Present
Livingston County, MI	ERP Selection and Implementation Management Assistance	May 2012 – Present
Horry County, SC	ERP Needs Assessment and Selection	Feb 2012 – Present
City of Oakland Park, FL	ERP Selection	Feb 2012 – Jan 2013

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<b>Client Name</b>	<b>Project Title</b>	<b>Project Date</b>
City of Cooper City, FL	ERP Selection	Feb 2012 – Oct 2012
Marin County, CA	ERP Operations Review	Feb 2012 – Present
City of Greenville, NC	ERP Selection	Dec 2011 – Present
Hampton Roads Sanitation District, VA	ERP Needs Assessment and Selection	Jan 2012 – Present
City of East Lansing, MI	ERP Needs Assessment	Dec 2011 – Aug 2012
Broward County, FL	ERP Selection Assistance	July 2011 – Present
City of North Miami Beach, FL	ERP Needs Assessment and System Selection	Apr 2011 – Present
City of Chandler, AZ	Oracle Upgrade Project Management Services	Mar 2011 – Nov 2011
Town of Jupiter, FL	Financial Management System Selection and Implementation Management Assistance	Mar 2011 – Nov 2012
City of Flagstaff, AZ	ERP Due Diligence Assistance	Jan 2011 – Aug 2011
Muskegon County, MI	FMIS Software Selection and Implementation Management Assistance	Jan 2011 – Present
City of Owensboro, KY	ERP Selection	Nov 2010 – Dec 2011
City of Asheville, NC	Development Services Software Selection	Oct 2010 – Sep 2011
City of Casper, WY	Software System Assessment	Aug 2010 – Aug 2011
City of Alexandria, VA	ERP Needs Assessment and Selection	Aug 2010 – June 2011
Borough of State College, PA	ERP Selection, Contract Negotiations and Implementation Management Assistance	Jul 2010 – Present
City of Miramar, FL	ERP Selection and Implementation Management Assistance	May 2010 – Jul 2012
City of Roswell, GA	ERP Selection, Contract Negotiations and Implementation Management Assistance	Jan 2010 – Present
Town of Hempstead, NY	Tax System Selection and Implementation Mgt.	Jun 2009 – Present
City of Mesa, AZ	ERP Selection and Implementation Management Assistance	Apr 2009 – Aug 2012
Cook County Public Guardian, IL	System Assessment and Selection	Apr 2009 – Present
Village of Mt. Prospect, IL	ERP Selection and Contract Negotiations	May 2009 – Dec 2009
Mid-America Regional Council (MARC)	ERP Selection and Contract Negotiations	Mar 2009 – Dec 2009
City of St. Charles, MO	ERP Selection and Contract Negotiations	Jan 2009 – Dec 2009

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Client Name	Project Title	Project Date
Waukesha County, WI	Financial Applications Analysis Study and RFP Development	May 2008 – Mar 2011
City of Asheville, NC	ERP Selection and Implementation Management	Oct 2007 – Dec 2010
St. Louis County, MO	ERP Selection and Implementation Management	Apr 2007 – Feb 2010
City of Sheboygan, WI	ERP Selection and Implementation Management	Mar 2007 – Dec 2008
City of St. Clair Shores, MI	Time and Attendance Software Selection	2007
City of Elgin, IL	FMIS Software Selection Assistance	Jun 2006 – May 2007
City of Cleveland, OH	FMIS Selection and Implementation Management	Oct 2006 – Feb 2010
City of Livonia, MI	Financial System Upgrade Implementation Management Assistance	2006 - 2008
Shelby Township, MI	ERP Selection and Implementation Management Assistance	2006 - 2008
Hancock County, OH	ERP Selection and Contract Negotiations	Jan 2004 – Dec 2004
City of Kalamazoo, MI	ERP Software Selection	2004 - 2005
Dane County, WI	FMIS Software Selection	Sep 2003 – Jan 2004

7. Describe the Proposer organization's number of employees, client base, and location of offices.

Plante Moran has over 2,000 staff firm-wide performing Management Consulting, Assurance and Tax services to clients throughout the U.S. with additional clients around the globe. Our Management Consulting practice area, which will perform the services requested by the City of Ft. Lauderdale, consists of:

- Over 175 staff and partners
- 17 of which are dedicated to serving governmental clients across the U.S.

We have provided and are currently providing ERP consulting services to a number of municipal clients in Florida. All of our office locations are listed below.

**Illinois**

**Chicago**  
 225 W. Washington Street  
 Suite 2700  
 Chicago, IL 60606

**Northwest Chicago**  
 2155 Point Boulevard  
 Suite 200  
 Elgin, IL 60123

**Michigan**

**Ann Arbor**  
 1000 Oakbrook Dr.  
 Suite 400  
 Ann Arbor, MI 48104

**Auburn Hills**  
 2601 Cambridge Court  
 Suite 500  
 Auburn Hills MI 48326 ,

**Detroit**  
 7310 Woodward Ave.  
 Suite 740  
 Detroit, MI 48202

**East Lansing**  
 1111 Michigan Avenue

**Flint**  
 111 E. Court St  
 Suite 1A

**Grand Rapids**  
 634 Front Avenue NW  
 Suite 400

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East Lansing, MI 48823

**Kalamazoo**  
750 Trade Centre Way  
Portage, MI 49002

**Southfield**  
27400 Northwestern Highway  
Southfield, MI 48034

**Ohio**

**Cincinnati**  
537 E. Pete Rose Way  
Cincinnati, OH 45202

**Toledo**  
3434 Granite Circle  
Toledo, OH 43617

Flint, MI 48502-1647

**Macomb**  
19176 Hall Road  
Suite 300  
Clinton Township, MI 48038

**Southfield (East Office)**  
26300 Northwestern Highway  
Suite 120  
Southfield, MI 48076

**Cleveland**  
1111 Superior Ave  
Suite 1250  
Cleveland, OH 44114

Grand Rapids, MI 49504

**St. Joseph**  
511 Renaissance Drive  
Suite 120  
St. Joseph, MI 49085

**Traverse City**  
600 E. Front Street  
Suite 300  
Traverse City, MI 49686

**Columbus**  
65 E. State Street  
Suite 600  
Columbus, OH 43215

8. Have you ever failed to complete work awarded to you? If so, where and why?

Situations have arisen in which the scope of work assigned to our firm was not completed that was due not to our failure to complete the work but rather an agreement with the client that the required services were no longer needed. For example, our initial agreement with Broward County included the provision of training and change management services as part of their ERP implementation. However, we jointly concluded that such services were more appropriately provided by the selected ERP vendor.

9. Provide a brief, descriptive statement indicating the Proposer's credentials to deliver the services sought under this RFP.

The following characteristics provided our credentials to deliver ERP consulting services to the City:

- **Longevity of ERP Practice:** As a firm, we have over 30 years' experience in assisting clients in conducting ERP full lifecycle projects for all areas of governmental operations including Financials, Human Resources / Payroll, Utility Billing, Community Services, Tax and Public Safety.
- **Experienced Project Team:** Our project team has significant and recent experience in performing similar work for other governmental clients. We generally have approximately 15 – 20 ERP projects going on at any one time which allows our consultants to maintain currency related to all facets and phases of an ERP initiative and the ERP marketplace in general.
- **Involvement in Complex ERP Procurement Transactions:** We have significant experience in working with ERP solution providers whose solution set involves a complexity of software solutions to meet the entire needs of a large organization. This has translated to involvement in working with clients and the selected vendor in negotiating complex contracts and statements of work. More recently, this has included involvement with clients who are intending to have their entire ERP Solution provided via Managed Services in which Managed Services options have significant variability in what can be provided.
- **Full ERP Lifecycle Involvement:** We have significant experience in leading clients through the complete transition to a new ERP environment including involvement in providing ERP needs assessment, software selection, contract negotiations, implementation planning and implementation management assistance. As a result of our significant ERP implementation



experience, we are able to identify lessons learned that translate to activities to be performed during the up-front phases of the project.

- **Completeness of ERP Expertise:** As a full-service consulting and accounting firm, we have both depth and breadth in the types of ERP services that we can provide within a single firm. In addition to traditional ERP software selection services, we are able to provide the following set of complementary services that are frequently viewed by our clients as value-add:
  - Chart of Accounts development
  - Business process redesign
  - Internal controls
  - Security
  - IT staff assessments to assist clients in understanding the degree to which their IT organizations have the needed skills and certifications to support a new ERP environment
  - Organizational assessments to assist clients in restructuring their organization including staff roles and responsibilities
  - Change management services to assist client staff in the transition from legacy technologies and business processes to more current technology and redesigned business processes
  - Application controls reviews
  - Disaster recovery planning
- **Vendor ERP Marketplace Knowledge:** We have extensive knowledge of the ERP software vendor marketplace and system integrator marketplace for those vendors that will be likely providers of software and services to the City. This experience has been gained through a number of activities including work with other clients in selecting and implementing ERP solutions, participation in conferences in which ERP vendors are participating (e.g., GFOA annual conference) and proactive meetings with ERP vendors to understand their latest product and service offerings to governmental clients. For example, over the last several months we have had meetings and/or phone calls with the following vendors to discuss aspects of the current and future plans related to their ERP products and services including:
  - Sungard (on-site meeting in January 2013)
  - Oracle (on-site meeting in December 2012)
  - Microsoft (discussions related to their Dynamics AX product)
  - Workday (conference calls and participation in webinars)
  - Agresso (on-site meeting scheduled for February 2013)
  - Infor (on-site meeting scheduled for February/March 2013)
  - Springbrook (series of conference calls to discuss their current and future plans)
  - New World Systems (meeting at their location)
  - Tyler Technologies (on-going involvement with them related to recent selection initiatives)

The additional benefit to the City is that the vendors are familiar and comfortable with how we manage our ERP selection projects and are confident that they will receive fair treatment in the process. This should lead to more responsive proposals for the City to consider.

- **ERP Tools, Templates and Methods:** Through our 30 years of conducting ERP selection projects, we have developed a vast repository of tools, templates and methods that provide

significant value and stream-lining to an ERP selection project while ensuring that the integrity and thoroughness of the process is maintained.

- **Independence:** We are completely independent from all providers of ERP software solutions and system integrators. As a result, we will be working with the City to select a Solution that provides the best overall value to the City and its stakeholders.
- **ERP Best Practice Identification:** We have extensive knowledge of ERP-related best practices through involvement in numerous software selection and implementation projects for other governmental clients. Through these projects and through our involvement in governmental operations reviews, we have developed a set of best practices related to execution of the various ERP areas including Financial, Human Capital Management and Supply Chain.
- **Risk Mitigation:** Our robust and thorough Solution selection process has resulted in the ability to significantly minimize the client's risk in the implementation phase of the project. Additionally, the thoroughness and self-documented nature of our process has translated to outcomes which are not challenged by the vendors through a formal protest process. This level of thoroughness has led to minimal change order activity during the implementation resulting in the achievement of project budgets and timeframes for implementation.
- **Client Retention:** The biggest testament to our capabilities and project staff is the desire for our clients to continue using our services after an initial ERP needs assessment/selection or other technology-related project. In our client references section, we will highlight such clients including those that have used our services in multiple instances due to the high degree of satisfaction with the quality of our services and our staff.

10. Briefly describe how long the Proposer has been performing the services required by this RFP and include the number of years in business.

Plante Moran was founded in 1924 and has been providing ERP consulting services to our municipal clients for over 30 years.

11. Provide a personnel roster and resumes of those who shall be assigned by the Proposer to perform duties or services under the contract assuming a start date of August, 2013 can be achieved.
12. The resumes shall detail each individual's title, ERP experience, education, current position with the Proposer, and employment history.

As a firm with over 2,000 staff members, we have deep resources to bring to bear on the City's project. The following table summarizes the qualifications of each proposed team member to assist the City on the project including recent relevant clients. Detailed resumes of each team member are included in the following section.

Staff	Role	Relevant Experience
Scott Eiler Partner Plante Moran	Project Director who will have overall responsibilities for ensuring that all project tasks are completed within schedule and budget and that all project deliverables meet the required quality standards.	City of Columbia, MO City of Cleveland, OH Broward County, FL Horry County, SC City of Mesa, AZ

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<p>Mike Riffel Senior Manager Plante Moran</p>	<p><b>Project Manager</b> who will manage the day-to-day activities on the project to include the entire Plante Moran team.</p>	<p>City of New Orleans, LA City of Alexandria, VA City of Chandler, AZ Marin County, CA City of Corpus Christi, TX</p>
<p>Chris Moshier Manager Plante Moran</p>	<p><b>Project Consultant</b> who will participate in the facilitation of departmental review sessions, development of ERP business requirements and proposal analysis activities.</p>	<p>City of Columbia, MO City of Hallandale Beach, FL Livingston County, MI Horry County, SC</p>
<p>Christine Cunliffe Manager Plante Moran</p>	<p><b>Project Consultant</b> who will participate in the facilitation of departmental review sessions, development of ERP business requirements and proposal analysis activities.</p>	<p>City of Columbia, MO New Braunfels Utilities, TX City of Ann Arbor, MI Village of Woodridge, IL Numerous consulting projects while at ADP and GFOA</p>
<p>Tracey Rau Manager Plante Moran</p>	<p><b>Project Consultant</b> who will participate in the facilitation of departmental review sessions, development of ERP business requirements and proposal analysis activities.</p>	<p>City of Columbia, MO Town of Jupiter, FL Borough of State College, PA City of Oakland Park, FL City of Asheville, NC Broward County, FL</p>
<p>Dale Vanderford Manager Plante Moran</p>	<p><b>Technical Consultant</b> who will be responsible for all technical aspects of the project.</p>	<p>City of Columbia, MO Broward County, FL City of Hallandale Beach, FL Horry County, SC Charlotte County, FL</p>

## Scott Eiler

Partner  
Information Technology Consulting



### EXPERIENCE INCLUDES:

**ERP Solution Lifecycle Deployment:** Significant experience in managing the entire process of selecting and deploying ERP solutions for governmental clients including conducting needs assessments, cost benefit analysis, defining system requirements, selecting and evaluating potential technology solutions, contract negotiations, statement of work development, implementation planning, implementation management and operational redesign.

**Technology Planning:** Experience in developing strategic technology plans and conducting information technology assessments for governmental clients. Assessment efforts have included the evaluation of all aspects of Organization, Administration and Technology within many large and complex IT environments. Through these efforts, he has gained a vast level of experience on technologies relevant to the various lines of business within a municipal and County government.

**IT Sourcing:** Experience assisting governmental clients in assessing options for outsourcing one or more technology functions. This has also included working with clients in the full lifecycle selection of an IT Sourcing provider including definition of sourcing requirements, RFP development, proposal evaluation and selection, contract negotiations and statement of work development.

**Project Management:** Significant experience providing leadership in the development and deployment of business applications on a wide variety of hardware and software platforms. Guidance has included the development of proposals, mentoring of project owners, development of standard processes and procedures and deployment of tools to improve efficiency or reduce costs for application development and deployment. He has also provided guidance to a number of public sector clients in the development of tools, templates and methods for implementing ERP solutions.

### PRIOR ORGANIZATIONAL AFFILIATIONS:

*Electronic Data Systems, Troy, Michigan (1985 – 1994)*

Advanced Engineering SE. Assisted in the definition, development, implementation and support of a large number of software applications residing on a variety of platforms. His range of experience has included systems development, project management and programming manager.

### EDUCATION:

- University of Michigan - Master of Business Administration
- University of Illinois - Bachelor of Science, General Engineering

### PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- Public Technology Institute (PTI)
- Government Finance Officers Association (GFOA)
- Project Management Institute (PMI)
- Project Management Professional (PMP) since 2003
- ITIL V3 Foundation Certified
- Prosci Change Management Certified

## Scott Eiler resume, continued:

### KEY CLIENTS:

- 
- Broward County, FL
  - Calhoun County, MI
  - Dane County, WI
  - DuPage County, IL
  - Gwinnett County, GA
  - Hancock County, FL
  - Horry County, SC
  - Johnson County, KS
  - Kent County, MI
  - Lake County, IL
  - Oakland County, MI (numerous projects)
  - St. Louis County, MO
  - Waukesha County, WI (numerous projects)
  - Urbana & Champaign Sanitary District, IL
  - City of Cleveland, OH
  - City of Battle Creek, MI
  - City of Elgin, IL
  - City of Kalamazoo, MI
  - City of Chicago, IL
  - City of Carrollton, TX
  - City of Hallandale Beach, FL
  - City of Mesa, AZ
  - City of North Miami Beach, FL
  - City of Ann Arbor, MI
  - City of Miramar, FL
  - City of Columbia, MO
  - Town of Jupiter, FL
  - City of Midland, MI
  - City of Owensboro, KY
  - City of Chandler, AZ
  - Charter Township of Shelby, MI
  - State of Michigan (numerous projects)

## Mike Riffel

Senior Manager  
Information Technology Consulting



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### EXPERIENCE INCLUDES:

**Software Needs Assessment:** Specialization in analyzing the business case for enterprise system replacement. Experience in facilitating functional area process discussions and identifying opportunities for technology to enable business process improvement. Extensive knowledge of the public sector enterprise system marketplace and published expert in regard to viable enterprise solutions.

**System Selection:** Experience in leading the process of selecting and deploying enterprise systems. Developed best practice financial and management technology specifications for inclusion in public sector request for proposal for enterprise systems. Extensive experience in vendor proposal analysis and demonstration script development.

**Business Process Documentation and Reengineering:** Experience in documenting as-is business processes and identifying areas for business process improvement. Specialization in implementing a results based budget methodology. Experience in implementing change management techniques to ensure user acceptance of new business processes and/or technology.

**Implementation Advisory Assistance:** Experience in providing guidance to a number of public sector clients in the development of tools, templates and methods for implementing ERP solutions. Guidance has included the development of proposals, mentoring of project owners, development of standard project management processes and procedures and deployment of tools to improve efficiency or reduce costs for application development and deployment.

**IT Governance Review:** Expertise in analyzing and designing organizational IT governance, specifically post implementation system support structures.

**Organizational Assessment:** Experience in analyzing organizational staffing, business process and technology relationships. Knowledge of best in class public sector transaction detail and staffing levels. Expertise in identifying opportunities to enhance current policy and procedure to maximize existing staff expertise or technology infrastructure.

### PRIOR ORGANIZATIONAL AFFILIATIONS:

*Government Finance Officers Association (2006 – 2010)*

Senior Consultant/Policy Analyst. Mike specialized in providing functional fit-gap analyses for technology and organizational needs assessments, facilitation of the system procurement process and design of implementation support structures. Mr. Riffel authored various chapters in multiple GFOA publications on topics ranging from CRM/311 to alternative software delivery models such as Software as a Service (SaaS).

Prior to GFOA, Mr. Riffel worked as Community Development Agent in Van Buren County, MI where Mike coordinated the implementation of a Homelessness Management Information System (HMIS) and drafted the 2005-2010 Van Buren County, MI Comprehensive Plan. In

## Mike Riffel resume, continued

addition, Mike was a Project Coordinator with Azavar Technologies Corporation in Chicago, IL where he implemented a utility tax audit program for municipalities throughout the "Chicagoland" area.

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### EDUCATION:

Michigan State University - Master of Public Policy Analysis and Administration (MPA)

Michigan State University - Bachelor of Science, International Relations

### PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- Government Finance Officers Association (GFOA)
- Pi Alpha Alpha – National Honor Society in Public Administration

### EXPERIENCE:

- Year Started in the Public Sector: 2003
- Year Stated in Public Sector Consulting : 2005
- Year Started Working at Plante & Moran: 2010

### PUBLICATIONS:

- Riffel, Mike; Bailey, Mike. "Understanding and Mitigating IT Project Risks." Government Finance Review; June 2010.
- Riffel, Mike. "Chapter 4 - Overview of the Current ERP Marketplace." The ERP Book: Financial Management Technology from A to Z. Chicago, GFOA, 2010.
- Riffel, Mike; Kavanagh, Shayne and Melbye, David. "Mission Critical: Evaluating and Funding Business Application Projects." IT Budgeting and Decision Making; Maximizing Your Governments Technology Investment. Edited by Shayne Kavanagh. Chicago: GFOA, 2009.
- Riffel, Mike; Kinney, Anne and Taylor, Paul. "Strategies and Lessons." Revolutionizing Constituent Relationships: The Promise of CRM for the Public Sector. Chicago: GFOA.

### KEY CLIENTS:

- City of Chandler, AZ
- County of Marin, CA
- City of Fayetteville, AR
- City of North Miami Beach, FL
- City of Alexandria, VA
- City of Owensboro, KY
- Hampton Roads Sanitation District, VA
- Cook County Public Guardian, IL
- City of Ketchikan, AK
- Montgomery County, MD
- Fairfax County, VA
- Charleston County Parks and Recreation Commission, SC
- Pasco County School District, FL

## Chris Moshier

Manager  
Information Technology Consulting



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### EXPERIENCES INCLUDE:

**Software Needs Assessment and System Selection:** Identifying unique organizational software requirements and opportunities for system improvement. Developing system request for proposals, evaluating vendor proposals, and performing cost option and requirement compliance analyses. Specializing in facilitating change management during the assessment and selection process through managing expectations and encouraging staff participation.

**Business Process Redesign:** Documenting existing public sector business processes and identifying opportunities for business process improvement. Specializing in utilizing change management techniques to ensure end user acceptance of new business processes and technology in the public sector. Extensive experience defining clear business requirements while serving as an effective liaison between technical and business teams.

**Application Planning and Implementation Management:** Managing the successful implementation and configuration of new enterprise systems. Extensive first-hand knowledge of the unique challenges and methods for implementing multi-departmental technology projects and process changes in the public sector. Experience developing detailed specifications and end-user business requirements for system selection and custom interface development.

**Spatial Technology:** Directing organizational GIS initiatives through the development of implementation plans and needs assessments. Extensive experience increasing operational efficiency by establishing new GIS-based processes and standards. Specializing in leveraging GIS and spatial analysis to support decision-making bodies that address local government and community planning issues.

### EDUCATION:

Central Michigan University – Bachelor of Science in Public Administration (with honors)

### PRIOR ORGANIZATIONAL AFFILIATIONS:

*Oakland County Parks and Recreation*

Managed the implementation and support of a new park, recreation and cashiering management system for 13 parks and a team 10 recreation programmers.

*Oakland County Planning and Economic Development Services*

Collaborated with local government leaders to address current community issues through spatial analysis and technology.

*Waterford Township Community Planning and Development*

Coordinated site plan review and community planning processes while increasing productivity by establishing new GIS and technology-based procedures.



## Chris Moshier resume, continued:

### HONORS AND RECOGNITION:

- 2013 Oakland County, MI Executive L. Brooks Patterson Elite 40 Under 40 Class Member
- 2012 Plante Moran Technology Innovation Award
- 2011 Oakland County Parks and Recreation Executive Officer's Award
- 2011 Michigan Recreation & Park Association Marketing Video Award (accepting team member)

### KEY CLIENTS:

- Broward County, FL
- Horry County, SC
- Livingston County, MI
- Hampton Road Sanitation District (VA)
- City of Hallandale Beach, FL
- City of Columbia, MO
- Town of Hempstead, NY
- City of Cooper City, FL
- City of Oakland Park, FL
- Town of Jupiter, FL
- City of East Lansing, MI
- City of North Miami Beach, FL
- City of Greenville, NC
- Muskegon County, MI

## Christine Cunliffe

Manager  
Information Technology Consulting



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### EXPERIENCE INCLUDES:

**Business Process Documentation and Reengineering:** Experience in documenting as-is business processes and identifying areas for business process improvement. Specialization in implementing a results based budget methodology. Experience in implementing change management techniques to ensure user acceptance of new business processes and/or technology. Specific specialty in payroll and human resources management processes.

**Software Needs Assessment:** Specialization in analyzing the business case for enterprise system improvement or replacement. Experience in facilitating functional area process discussions and identifying opportunities for technology to enable business process improvement. Extensive knowledge of the public sector enterprise system marketplace and intimate knowledge in regard to viable enterprise solutions.

**ERP System Selection:** Experience in the process of selecting and deploying enterprise systems. Developed technology specifications for inclusion in public sector request for proposal for enterprise systems. Extensive experience in vendor proposal analysis and demonstration script development.

**Systems Implementation Management:** Provided implementation management services associated with deployment of newly selected systems. Activities have included, project planning, review of project deliverables, management of the project issues, facilitation of project status review, review and approval of project invoicing and others as dictated by the project.

### PRIOR ORGANIZATIONAL AFFILIATIONS:

*Ceridian – Project Manager/Business Analyst*

Served as primary point of contact and client-facing technical expert for HRIS software implementation. Conducted discovery meetings with customers, prospects, and C-level executives to gather and document sales, marketing, and customer service requirements, define and create specifications. Simultaneously managed up to six accounts, coordinating change order and data migration processes with offshore resources and various divisions in implementing add-on products. Actively participated in internal process improvement projects, create and manage project timelines, and provide workflow process improvement and end-user training company-wide. Produced and deliver weekly status reports to senior leadership:

*Government Finance Officers Association – Consultant / Policy Analyst*

Served in dual role as Project Manager and Consultant for a professional association consisting of over 17,000 members. Advised local governments and special districts throughout all phases of ERP implementation, software selection, procurement, and technical support. Assessed client needs, conducted business case analysis, gathered functional requirements, developed requests for proposals, and facilitated follow-up vendor meetings for contract negotiations. Coached and advised public organizations to develop structured change management, implementation communication, public outreach, and training/staffing plans. Established training milestones, ensuring deadlines were consistently met.

## Christine Cunliffe resume, continued

### EDUCATION:

- Northwestern University, Master of Public Administration (MPA), Public Policy
  - University of Washington, Bachelor of Arts, Political Science
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### PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- Project Management Professional (PMP), 2011
- Certified Associate in Project Management (CAPM), 2009

### KEY CLIENTS:

- Marin County, CA
- John Ball Zoo, MI
- Cook County Public Guardian, IL
- City of North Miami Beach, FL
- Village of Woodridge, IL
- Cape Fear Public Utility, NC
- Village of Northbrook, IL
- City of Ann Arbor, MI
- Sumner County, TN
- New Braunfels Utilities, TX
- Others as a GFOA consultant and Ceridian implementer

## Tracey Rau

Manager  
Information Technology Consulting



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### EXPERIENCES INCLUDE:

**Software Needs Assessment** – More than 25 years of experience in identifying and analyzing customer needs related to the full suite of ERP software including Utility Billing, Taxes, Assessing, Special Assessment, Voter Registration, Planning & Zoning, Permits, Code Enforcement, Business License, Cemetery Management, Fleet Management, Work Orders, Facilities, Inventory, and all Financials (AP, AR, Payroll/HR, GL, Budgeting, Cash Receipting and others).

**Systems Selection** - Assisted numerous clients in the evaluation and selection of enterprise resource planning (ERP) and other information systems. Conducts group interview sessions and ensure maximum participation by staff for project success. Prepares detailed software requirements, documents desired and current interfaces, conducts specification review sessions, prepares comprehensive Request for Proposal (RFP) documents, and assists clients with analysis of proposals and identification of preferred vendors.

**Software Implementation Management** – More than 25 years of municipal software implementation experience providing a variety of services related to the deployment of a packaged solution including analysis of needs, data conversion, training, testing, documentation development, software installation, and interface development.

**Municipal Software Customer Support Representative** – Supported a broad base of municipal clients operating on a municipal ERP solution. Activities included customer support, conversion of customers from other software solutions, organizing and conducting classroom training, phone support, managing of software manuals and related documentation, project management and business analysis activities related to the development of specifications for software enhancements.

**Account Management** – Responsible for the full life cycle of managing municipal software in the Midwest including seeking potential clients, initiation of sales activities, set-up and participation in product demonstrations. Assisted in conversions, software and hardware installation, training, support, and project management.

### PRIOR ORGANIZATIONAL AFFILIATIONS:

*VADIM/VERSYSS Software – Numerous Roles*

Held a variety of positions within an organization that provides municipal software to the public sector. Through six corporate acquisitions she has fulfilled a variety of roles including senior account manager, customer support representative, implementation consultant, vertical software manager, director of training, and computer applications instructor. Through these experiences she has been exposed to all facets of the software lifecycle including sales, implementation, and customer support.

### EDUCATION:

Michigan State University — Bachelor of Arts, College of Business

## Tracey Rau resume, continued

### PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- Government Finance Officers Association (GFOA)
  - Michigan Government Finance Officers Association (MGFOA)
    - Standards Committee Board member for 2005 – 2006,
    - Technology Committee Board member for 2009 – present
- 

### KEY CLIENTS:

- Broward County, FL
- City of Detroit, MI
- City of Cooper City, FL
- City of Miramar, FL
- Borough of State College, PA
- Muskegon County, MI
- City of Cleveland, OH
- City of East Lansing, MI
- City of Flagstaff, AZ
- City of Warren, MI
- Washington Township, MI
- City of Columbia, MO
- City of Pueblo, CO
- City of Roswell, GA
- City of Oakland Park, FL
- Town of Jupiter, FL
- City of Farmington, MI
- City of Flint, MI
- City of Asheville, NC
- City of Greenville, NC
- Mid-America Regional Council (MARC), MO
- Village of Mt. Prospect, IL
- City of St. Charles, MO
- Village of Union City, MI
- County of Broward, FL
- Numerous municipal clients as a software implementer

## Dale Vanderford

Manager  
Information Technology Consulting



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### EXPERIENCES INCLUDE:

**Software Needs Assessment:** Specialization in analyzing the business case for enterprise system improvement or replacement. Experience in facilitating functional area process discussions and identifying opportunities for technology to enable business process improvement. Extensive knowledge of the public sector enterprise system marketplace and intimate knowledge in regard to viable enterprise solutions.

**System Selection:** Experience in the process of selecting and deploying enterprise systems. Developed technology specifications for inclusion in public sector request for proposal for enterprise systems. Extensive experience in vendor proposal analysis and demonstration script development.

**IT Organizational Assessment and Strategic Planning:** Experience in analyzing IT organizational staffing, process and technology relationships. Knowledge of best in class public sector transaction detail and staffing levels. Expertise in identifying opportunities to enhance current policy and procedure to maximize existing staff expertise or technology infrastructure. Performed Technology reviews in several cities and counties, including Colorado Springs, Colorado, Horry County, SC, Macomb County, MI, and Carlsbad, CA.

**Business Process Documentation and Reengineering:** Experience in documenting as-is business processes and identifying areas for business process improvement. Specialization in implementing a results based budget methodology. Experience in implementing change management techniques to ensure user acceptance of new business processes and/or technology.

**Technology Implementation Management:** Provided implementation management services associated with deployment of newly selected systems. Activities have included, project planning, review of project deliverables, management of the project issues, facilitation of project status review, review and approval of project invoicing and others as dictated by the project.

**Cross Boundary Collaboration:** Architected and implemented partnership of multiple local units of governments in regards to Information Technology staffing, resources, and infrastructure utilization cooperation agreements.

### EDUCATION:

Eastern Michigan University — Bachelor of Science, Communications Technology

### PROFESSIONAL AFFILIATIONS AND CERTIFICATIONS:

- **Specialized Training:** Effective Communications and Human Relations, Dale Carnegie, Ann Arbor, MI, 2006
- Former Board Member, Washtenaw County Homeland Security Local Response Team
- Member, CIO Council, Public Technology Institute, Washington, D.C.
- Board of Directors, Washtenaw County/EMU Legal Resource Center, Ann Arbor, MI
- Member, Metropolitan Information Exchange

## Dale Vanderford resume, continued

### **PRIOR ORGANIZATIONAL AFFILIATIONS:**

*Washtenaw County, MI – Director of Technology and Operations*

Directed the operations of the Technology Department to support efficient and effective service delivery for a county government with 1,300 employees and a \$200 million annual budget, serving 340,000 residents. Developed and implemented the 5-year Technology Plan which supported the County's strategic direction by providing technical knowledge, skills, and resources to enhance the ability of internal and external customers to create a positive impact in the community. Hired, trained, and led a team of 34 employees (management, technical, and administrative staff), with an \$9 million annual operating budget, to effectively implement the Plan. Key areas of focus included:

- Employee Help Desk and System Support
- Application and Database Support
- Network Administration
- Voice and Data Communications
- Geographic Information Systems
- IT Services to Local Governments and Community Residents

### **KEY CLIENTS:**

- City of Colorado Springs, CO
- Borough of State College, PA
- City of Carlsbad, CA
- County of Ottawa, MI
- County of Muskegon, MI
- City of Hallandale Beach, FL
- County of Macomb, MI
- County of Broward, FL
- County of Horry, SC
- City of Columbia, MO
- City of Colorado Springs, CO
- Numerous projects as IT Director for Washtenaw County

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13. Provide a statement of whether the Proposer intends to use subcontractors, and if so, the names and mailing addresses of the committed subcontractors and a description of the scope and portions of the work the subcontractors will perform.

**Plante Moran will not be utilizing any subcontractors for this project.**

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## 6. Technical Approach

1. Provide a narrative that illustrates the Proposer's understanding of the City's requirements.

The City of Ft. Lauderdale is a large full-service City located in south Florida that provides citizens with a full complement of municipal services including administration, public works, water and sewer utility, parks and recreation, planning, permitting, code enforcement, public safety police and fire, parking services and others. As a full-service City with a 2013 budget of \$476M and approximately 2,500 staff, this translates to a complexity of operations that requires a high-level of needs for software systems to manage these operations.

The City currently uses a number of software applications that have been implemented over the last several years to satisfy individual and line of business needs. This has translated to a lack of desired integration between the various solutions resulting in duplication of work efforts and redundant entry and storage of data and computer tasks resulting in an overall system configuration that is not as efficient and effective in managing City operations as desired. This complexity is further compounded by increasing financial reporting and operational demands on the organization while operating under a state of financial stress due to the recent economic malaise.

Due to these challenges, the City is looking to select and implement a new Enterprise Resource Planning (ERP) system to reduce overall organization costs, improve the efficiency and effectiveness in performing operational activities and to improve financial reporting. The City desires to use the services of an experienced consultant to assess and analyze the various software applications being used by the City and to assist in the selection of a Solution that will support the goals and objectives of the project.

2. What have been the significant problems with ERP implementations in other agencies? Describe how you will help the City of Fort Lauderdale avoid similar problems.

Plante Moran has been involved with assisting municipal clients in the selection and implementation of municipal software systems for nearly 30 years. During this period of time, we have developed a very strong understanding of the challenges that clients face during the implementation of a new ERP including involvement with five current clients on ERP implementations. The following table identifies some of these challenges and what we have counseled clients to mitigate these challenges. Certain challenges are indicative of ERP projects that we have performed over the last 30 years while certain challenges are somewhat specific to the current environment.

1. **Lack of Visible and Committed Executive Sponsorship** – Without a strong level of visible executive sponsorship on the project, challenges faced by the project team in terms of changing business practices, obtaining necessary resources from the organization and working through staff change management issues will be extremely challenging. Our assistance to the City in this area would be as follows:
  - a. Identify an individual who has a high-level of authority and responsibility within the organization to provide Executive Sponsorship on the project
  - b. Review the roles and responsibilities for this individual and document as part of the Project Charter
  - c. Ensure that this individual is visible at key points during the selection and implementation phases of the project

- d. Implement an Executive Steering Committee as part of the project that would be chaired by the Executive Sponsor

**2. Lack of Appropriate Levels of Client Staff during the Implementation** – One of the major problems that our clients are currently facing during ERP implementations is the ability to commit the necessary amount of time required to perform all of the implementation activities required.

Most municipal organizations have seen their staffing levels reduced, in some cases significantly, during the economic malaise while service levels have increased. The effect of managing current operations while undertaking an ERP implementation has become overwhelming for many organizations. Our assistance to the City in this area would be as follows:

- a. Set realistic expectations as to the required level of staff implementation effort required during the early part of the selection phase of the project with executive management within the City
- b. Communicate that key business area decision makers will need to commit their time in a meaningful way during system implementation
- c. Request information from the vendors as part of the RFP as to expected levels of staff commitment required during the implementation phase of the project
- d. Implement an appropriate phasing of modules during system implementation that is achievable within current staffing constraints
- e. Secure external contract resources to perform City required activities during system implementation for certain technical and business areas
- f. Determine if recent retirees can be contracted back to the City to provide backfill to existing operations so key staff can be freed up for the project
- g. Defer other non-critical projects to a future timeframe
- h. Expedite initiation of implementation activities to the selection phase of the project (e.g., identification of key issues and opportunities, data cleansing, collection of documentation for use by the software vendor, etc.)

**3. Challenges with ERP Vendor Implementation Staff** – The economic malaise experienced across the country, and particularly in the state of Florida, has recently improved resulting in municipal entities being more comfortable with spending on infrastructure upgrades including major ERP initiatives. This breaking of pent-up demand has resulted in a significant level of activity in the ERP marketplace that has put significant strains on the ability for vendors to effectively implement their solution with qualified staff. Particular vendors in the Tier 2 ERP vendor marketplace have experienced recent success in selling their product but have been challenged in implementing their product. This has resulted in ERP vendors employing staff that are not familiar with the company's implementation approach or the capabilities of the product. Furthermore, we have found that the availability of these staff during periods when they are not physically on-site at the client has been extremely challenging due to their commitment to a number of other implementations. Our assistance to the City in this area would be as follows:

- a. During the RFP process request information on the number of implementation staff and number of current active implementations
- b. Be able to interview and approve proposed key vendor implementation staff including the vendor project manager and functional leads
- c. Request and conduct reference checking for key vendor staff on the project
- d. Put protections in the contract for deficiencies due to poor implementation services (e.g., liquidated damages, ability to approve key staff, etc.)

- e. Request resumes of ALL proposed implementation staff prior to them coming on-site to the City for any type of consulting and training sessions
  - f. Clarify during the early stages of the implementation how functional issues/questions will be addressed when the leads are physically not on-site at the City
  - g. Leverage LinkedIn to review past history of proposed vendor implementation and training staff
  - h. Execute other implementation-related activities to ensure an overall smoother process
4. **Lack of Staff Buy-In to the Project** – One of the major goals during an ERP selection process is to ensure that staff have buy-in to the selected Solution and feel that the Solution will provide the best fit for the City. This buy-in to the process and selected Solution will be a positive motivator for staff going into the implementation phase of the project. Our assistance to the City in this area would be as follows:
- a. Implement a comprehensive governance structure during the Selection phase of the project that involves a number of staff including the establishment of module leads and teams that include both process owners and representative process end-users
  - b. Conduct interviews with all departments to ensure that their needs are listened to and incorporated into the process
  - c. Involve business staff at a variety of points within the software selection phase including:
    - Involvement in departmental interviews
    - Review and approval of functional specifications
    - Review of the Issues and Opportunities matrix
    - Development of vendor demonstration scripts
    - Analysis of the appropriate sections of the ERP vendor responses
    - Participation in vendor demonstrations
    - Participation in site visits and reference checking

We would envision that the leads during the selection phase of the project would then take on leadership roles during the implementation phase of the project as well.

Other common problems with ERP implementations that we have worked with clients in resolving include the following categories of risks:

- Communications and Change Management
- Data Conversion
- Go-Live Transition
- Process Redesign
- Project Management
- Requirements / Functionality
- Staffing
- Technical
- Testing
- Training
- Vendor

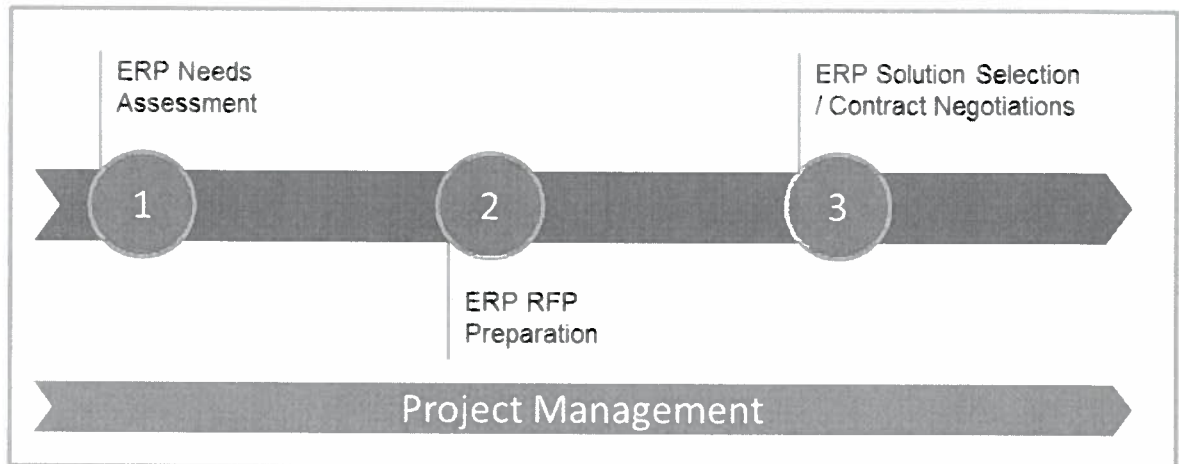
Additionally, we have a list of approximately 110 lessons learned derived from other ERP implementations that we will review with City project team staff.

3. Provide a narrative that illustrates how the Proposer will complete the scope of services and accomplish required objectives.

### OVERVIEW OF PROJECT APPROACH

Having performed similar ERP projects for many small, mid-size and large, local units of government over the years, Plante Moran's seasoned project consultants have developed and refined a proven methodology and set of related tools that are intended to mitigate our clients risk during this complex project by leveraging best practices while incorporating the clients unique needs. Through our best practice approach we present the specific tasks to be completed as well as detail the timeline for their completion, highlighting the key project milestones. Additionally, in conjunction with further details presented in our proposal, we present a description as to the roles and responsibilities of City staff on the project activities. Our approach consists of engaging our proposed qualified project team to develop, refine and execute a proven project plan, supported by our mature ERP toolkit, to meet the City's expressed project objectives.

Our methodology, further detailed in the following section, includes the following three key phases to assist the City with the selection and negotiation of a contract with the selected ERP vendor.



## DETAILED PROJECT APPROACH PROPOSED

4. Provide a narrative that illustrates how the Proposer will manage the Proposer's portion of the project, ensuring completion of the scope of services, and accomplishing required objectives.

### Phase 0: Project Management

**Phase Objective and Summary of Activities:** The purpose of this phase is to conduct activities that are relevant to managing the project and enhancing its success for the City. The major activities to be performed are as follows:

- Develop a Project Organizational Structure that defines staff roles and expectations
- Develop a Project Charter that provides a framework from which the project will progress
- Develop a detailed Project Plan identifying the activities, responsibilities and timing of tasks necessary to complete the project
- Establish a Project Collaboration Environment to act as a repository for project information
- Conduct periodic status meetings to monitor project progress

Measurable Objective	Deliverables/Milestones
Manage the defined project through to successful completion within budget and on schedule while meeting project goals and objectives	Project Organizational Structure Project Charter Project Plan Project Collaboration Center

### 1. Project Initiation

A project initiation meeting will be conducted to introduce the project team, finalize the project scope, deliverables and timetables. These objectives will be accomplished through the development of a project organizational structure, project charter, detailed project plan and regularly scheduled progress meetings. These steps are described below.

### 2. Define Project Organizational Structure

Our approach to each consulting engagement is structured to provide the services and level of professional support required to meet the individual needs of the client. We will work jointly with the key City contacts to design a process that will meet the overall needs of the City. As standard practice in the majority of our engagements, especially those related to technology and process transformation, we have designed a very collaborative approach to ensure a high probability of success. During the early stages of the project we suggest creating a cross-functional group of representatives from essential departments to be involved in the process. We would expect the City to identify the appropriate individual participants. This Committee will be involved in all aspects of defining system needs, selecting a new system and creating an environment of collaboration and communication between critical City departments. They are noted in our following detailed project work-plan, where appropriate, and are suggested to increase the probability of long-term project success within the City.

### 3. Develop Project Charter

During project initiation, a Project Charter will be developed that will provide a framework for the following areas of focus:

- Project overview
- Vision statement
- Project influences
- Scope plan (both in and out of scope items). In-scope items to include:
  - Financial modules, including Accounting, Budgeting, Purchasing, Inventory, Accounts Payable, Accounts Receivable, Cash Receipts
  - Human Resources and Payroll
- Project staffing

The Project Charter will be provided to the City for review and approval prior to significantly commencing project activities.

### 4. Develop Detailed Project Plan

We will work with the City to incorporate the following into a detailed Microsoft Project™ Plan:

- Major phases and milestones
- Work tasks and their due dates with assigned responsibility

We will work with the PMO during this activity to design a Project Plan for the contracted project phases which is appropriate and meets the City's overall priorities.

### 5. Establish Project Collaboration Center

Over the last few years, collaboration environments such as Microsoft SharePoint have become increasingly viable tools in which to establish project collaboration environments for small, mid-size and large-scale projects. These environments can serve a variety of purposes including acting as a repository for documentation developed during the course of an ERP engagement.

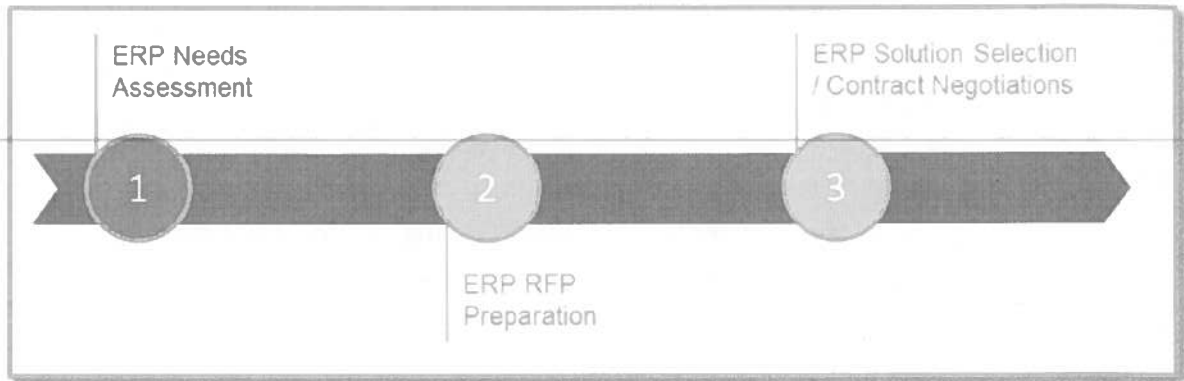
During this activity, we will work with the City to assist in establishing a Project Collaboration Center including design, structure, security and content.

### 6. Schedule and Moderate Project Status Meetings

Continuous feedback is the key to a successful project. In this way, problems can either be avoided entirely, or addressed early on, to minimize wasted effort and keep the project on schedule. We will schedule regular conference calls with the City to:

- Report on the status of the Project Plan and timeline
- Re-schedule tasks as necessary and update Project Plan
- Discuss major open issues and develop strategies to address them

**Phase 1: ERP Needs Assessment**



**Phase Objective and Summary of Activities:** The purpose of this phase is to conduct a needs assessment around process areas relevant to the project for the purpose of defining current ERP system, issues and opportunities as well as the identification of key functional requirements that will be used as part of the process for evaluating proposed ERP solutions. Activities to be included in this phase are as follows:

- Obtain and review relevant documents to obtain background information on the current and desired ERP environment
- Assess the City's current technology infrastructure and ERP environment
- Conduct interviews with key stakeholders
- Develop Issues and Opportunities Matrix
- Develop estimated Project TCO and tentative implementation timeline

Measurable Objective	Deliverables/Milestones
<ul style="list-style-type: none"> <li>• Understanding of current technical environment</li> <li>• Established staff expectations on a future environment with a new ERP</li> <li>• Knowledge of current ERP work processes</li> </ul>	<ul style="list-style-type: none"> <li>• Interview Schedules</li> <li>• IT Infrastructure Assessment</li> <li>• Issues and Opportunities Matrix</li> <li>• Estimated Project TCO</li> <li>• Tentative Implementation Timeline</li> </ul>

**1. Review Documents**

Plante Moran will review any available existing documentation gathered and provided by the City to gain a comprehensive understanding of the City's ERP-related operations and current technologies. Documents to be reviewed include the following:

- Mission Statements
- Previous studies that are relevant to the project
- Relevant process and function descriptions/handbooks, pre-existing workflow documentation/flowcharts, such as those that the City has already developed
- Organizational charts

- Inventory listing of all systems relevant to performing key ERP business processes.
  - Cost models, current operating budget detail, purchasing plans for technology, etc.
  - Relevant hardware, software and network diagrams, and/or other documents, illustrating the layout, networking, etc.
- 
- Listing of existing systems supporting the various business processes that will be evaluated for potential replacement or interfacing to the new ERP
  - Listing of additional “shadow systems” and non-integrated systems
  - Critical systems to be interfaced with the new software
  - Outstanding enhancement requests on current relevant systems
  - Locations of all sites involved in the project, identification of sites that share common property, identification of sites to be visited, and schedules of staff for visits
  - City standards for hardware, software, network operating systems, configurations and protocols, etc.

## **2. Assess the City's Information Technology Infrastructure**

We will distribute a technical questionnaire for the City's completion and perform a phone interview with staff directly involved with supporting the City's current technical environment. The results of reviewing documentation and interviewing staff will allow us to identify and document the legacy technologies, infrastructure, and facilities. The potential implementation and administration of a new software solution will require a thorough and responsive support and communication infrastructure. To this end, we will identify and document the current environment for inclusion in the RFP as well as well as identify and preliminary high level general recommendations related supporting technologies that must be implemented well in advance of obtaining more detailed technical environment requirements from ERP software vendors as part of their proposals.

## **3. Conduct Interviews**

After reviewing the documentation collected, Plante Moran will conduct up to three days of interviews with teams representing departments directly involved with the City's municipal management business processes.

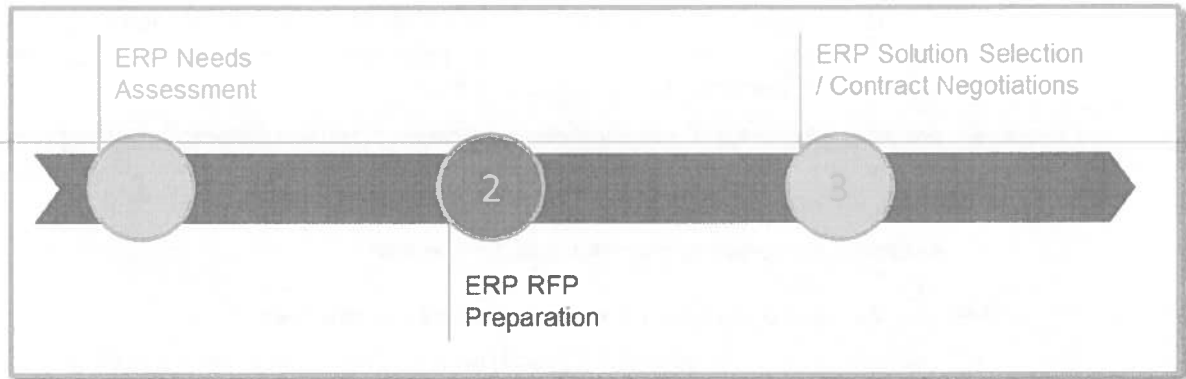
During the interviews, we will discuss key current business and technological workflows in order to further define the current systems and required system interfaces. These sessions will focus on reviewing sub-functions that are performed within each of the areas above to discuss both system and operational areas.

## **4. Develop Issues and Opportunities Matrix**

We will prepare an Issues and Opportunities Matrix that will reflect the results of our benchmarking the “issues” with our knowledge of Best Practices and experience with other governmental clients. Our recommendations will fall into short-term and long-term categories and will be categorized into process, policy, and technological areas. The short-term recommendations will focus on high value, limited technology-involved processes to be addressed in the near term. The long-term recommendations will focus on medium to high impact processes with greater technology and/or capital outlay requirements beyond just the new ERP implementation. Additionally, we will develop an estimated Total Cost of Ownership (TCO) for the project and a tentative timeline that will be refined with the selected ERP vendor as part of the Statement of Work (SOW) activity.



**Phase 2: ERP RFP Preparation**



**Phase Objective and Summary of Activities:** The purpose of this phase is to develop a Request for Proposal (RFP) for purposes of soliciting responses from vendors who provide ERP implementation services and solutions for entities similar in size and complexity to the City. This will include the following activities:

- Define Vendor Selection Criteria and Weighting Factors to evaluate vendor responses
- Define a Decision-Making process that will be used to guide the evaluation and ultimate decision on a selected vendor
- Develop and finalize ERP Software Specifications by holding cross functional meetings with City staff.
- Develop and distribute a Request for Proposal (RFP) to providers of ERP software solutions

Measurable Objective	Deliverables/Milestones
Develop a Request for Proposal (RFP) that represents the needs of the City.	Vendor Selection Criteria Decision-Making Process ERP Software Specifications Request for Proposal

**1. Develop Solution Selection Criteria and Define Decision-Making Process**

Our selection approach will enable the City to identify the overall finalist, in conjunction with other due diligence tasks (i.e., reference checks, site visits, and successful contract negotiations). Before proceeding with release of the RFP, the Steering Committee should meet to delineate the selection criteria and weighting factors that will be used to analyze Request for Proposal (RFP) responses and additional analysis for the finalist vendors. The following list illustrates sample criteria and weighting factors we have successfully used to select software solutions for government clients. We will work with the Steering Committee to define criteria appropriate to the circumstances and environment of the City. The list also explains how the ranking of RFP responses occurs:

**Criterion: Software Specification Compliance**

- Response weightings (see section Develop ERP Software Specifications below for further detail) are used to calculate an overall weighted specification compliance percentage for each specification / application module sub-section
- Relative weightings of specification / application module sub-sections in comparison to one another are used to calculate an overall weighted specification compliance percentage for the entire software solution
- Compare compliance percentages of each vendor

**Criterion: Vendor Background Questionnaire Responses**

- Various point scores assigned to each question and a total score is calculated
- Compare point scores of each vendor

**Criterion: Costs**

- One-time and on-going support costs are tallied
- Compare costs of each vendor

**Criterion: Professional Services Contract Compliance**

- Various point scores assigned to each clause and a total score is calculated
- Compare point scores of each vendor

**Criterion: Implementation Schedule Compliance**

- Various point scores assigned to each due date and a total score is calculated
- Compare point scores with other vendors' scores

We typically use a tiered process in which to reach the finalist decision. For example, the City may wish to specify minimum criteria that all responding vendors are required to meet in order for their bid response to be considered (e.g., minimum population size of municipality with installation of the current version of their software, bid response does not exceed a particular dollar figure, etc.). For those vendors meeting the initial criteria, their bid responses will be evaluated against a second level of criteria prior to any formal due diligence activities, vendor demonstrations, etc. This evaluation will be based solely on their RFP response. The top two or three vendors that score the highest on this second round of scoring will be considered the finalist vendors. For the finalist vendors, a more comprehensive scoring process will be used that is based on the following sources of information:

- Vendor RFP response
- Vendor demonstration(s)
- Reference checking with comparable sites
- Potential site visits
- Other due diligence activities (e.g., vendor research, knowledge of vendor in marketplace as noted by other clients or industry analysts)

Categories of criteria and sub-criteria are established along with weightings to conduct an unbiased scoring of the finalist vendors. Scoring of the finalist vendors can be conducted in a group setting with all members of the Steering Committee developing a single score or conducted individually by

members of the selection who will score vendors in areas that they have comfort in scoring. There may be situations in which certain members of the Steering Committee may not be comfortable with scoring a vendor's solution (e.g., technical infrastructure in which they do not have knowledge or expertise in that area). The following categories of criteria and relative rankings can be used as a typical example:

- 
- General Vendor 30%
  - Functional Requirements 35%
  - Technical Requirements 15%
  - Other Vendor 15%
  - Cost 5%

An Excel template we have used on many client assignments will be used to record the above scores and calculations, allowing for a numerical ranking of the proposed solutions to be calculated. We feel it is important to establish this scoring prior to release of the RFP such that it removes as much bias as possible from the selection process. Additionally, we will normally describe the detailed evaluation process in the RFP itself such that the vendor's understand how their solution is being evaluated.

## 2. Develop ERP Software Specifications

As a basis for the development of software specifications, we will leverage existing best practice ERP software specifications that we have developed for government clients with similar size/complexity along with critical and unique specifications and interfaces that were defined in the assessment phase of the project. These software specifications, when combined with the City's unique requirements, will form the basis of the City's technical and functional requirements.

The ERP Software Specifications will then be distributed to the City departments involved in the interview process for review and feedback. Several cross functional specification meetings will be held to collect feedback/edits from the departments via web meeting. Final edits, additions, and deletions to the specifications will be incorporated for use in the RFP. This activity ensures that feedback is continually sought from the users and entrenches their engagement in the process.

Vendors will be asked to review the software specification forms in the RFP and respond accordingly. The vendors' responses will be entered under an Availability column on the forms as follows:

---

<b>Y</b>	If specification/report is available as a standard feature of the software
<hr/>	
<b>R</b>	If functionality is available through reports generated using proposed Reporting Tools.
<hr/>	
<b>M</b>	If functionality is provided through customization to the application, including creation of a new workflow or development of a custom interface, that may have an impact on future upgradability.
<hr/>	
<b>F</b>	If functionality is not available now, but will be available in a future release of the software within 1 year
<hr/>	
<b>N</b>	If functionality is not available

---

A Cost column on the form will be used for "M" or "F" responses to estimate the cost to be incurred by the City to secure the specification/report. A Priority column will include one of the following entries to indicate the importance of the specification/report to the City:

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<b>H</b>	High	<b>M</b>	Medium	<b>L</b>	Low
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### 3. Develop Request for Proposal (RFP) Document

We will develop a single ERP RFP document to solicit responses in a format that will ease analysis. The RFP will be developed with the intent of maximizing functionality requested from a single ERP vendor. We will structure the RFP and encourage a single, prime contractor vendor will to partner with other vendors in order to provide the City with a complete solution. The RFP will be tailored to the City's unique purchasing requirements based on the project activities performed, but is minimally expected to include the following:

- Background information on the City and the scope of the project, including:
  - Current environment and Technology standards
  - Operating volumes
  - Other planned, related City initiatives
  - Interfaces required
- A discussion of the timeline and approach being taken by the City to select a finalist software solution, including:
  - Intent
  - Selection criteria
  - Timeline
- Guidelines for ERP software and implementation vendors to submit proposals
  - Proposal response format
  - Details of Implementation services requested
    - Project Management
    - System and operational procedure development
    - Hardware and software installation
    - Data conversion
    - Report development
    - Integration and interface development
    - Training for implementation team and end users
    - Documentation development
    - Process redesign
    - Ongoing support and maintenance services
  - City contractual terms and conditions
  - Minimum and recommended hardware
- Software specifications

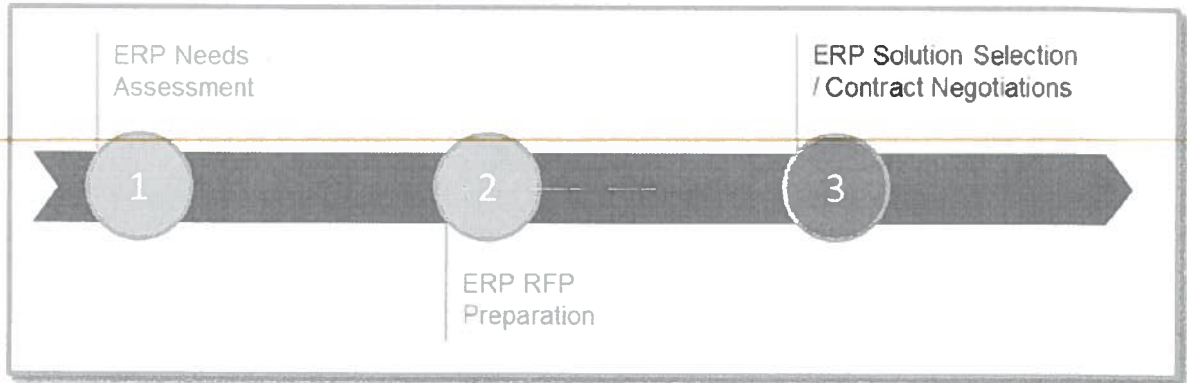
- Various forms for the vendors to complete and return, including:
    - Software and Technical Specifications
    - Vendor Background Questionnaire
    - Pricing Summary
    - Reference Forms
  - Attachments as appropriate
- 

#### **4. Distribute Request for Proposal (RFP) Document**

We will distribute the RFP to the City for review and feedback. We will incorporate all feedback and necessary revisions before the City approves, finalizes and distributes all RFP contents.

During this activity, we will provide consultation to the City project manager and selection committee regarding the ERP marketplace and appropriate distribution protocols including: advertising, bid services, and other methods to solicit responses.

**Phase 3: ERP Solution Selection / Contract Negotiations**



**Phase Objective and Summary of Activities:** The purpose of this phase is to conduct due diligence activities associated with respondents to the RFP, to assist the City in reaching a selected vendor decision and negotiating a contract and statement of work with the selected vendor. This will include the following:

- Manage ERP Vendor Q&A prior to the proposal due date
- Present Proposal Response Analysis
- Conduct additional due diligence activities (i.e., vendor demonstrations, reference checking, site visits, etc.)
- Conclude on selected vendor
- Develop Statement of Work with selected vendor
- Develop Negotiated Contract with selected vendor

Measurable Objective	Deliverables/Milestones
Vendor is selected based on a consensus decision	Vendor Pre-Bid Meeting RFP Addendum ERP Proposal Analysis Demonstration Materials Selected ERP Vendor Negotiated Contract Statement of Work

**1. Manage ERP Vendor Q&A During Pre-Proposal Due Date Timeframe**

We anticipate that City procurement policy would, as is common with many municipalities, require that City staff be the formal key point of vendor contact for the RFP. As a primary resource in the detailed development of the RFP, we would anticipate, along with the City's PMO team, having one of the most detailed comprehensive understandings of the overall requirements of the joint-consultant - City project team. As such, and in accordance with typical municipal procurement practices for RFP's, we

would expect that the City's purchasing staff would act as the first line of vendor communication and interaction for a formal written Q&A and proposal clarification process.

Plante Moran would support this activity by working to draft the responses to the City compiled list of vendor questions. We would develop draft responses based on our understanding of the City's expectations established during prior project activities. We would then work with the City to identify the appropriate City resources for any additional or supplemental, review and clarification. As the draft is completed, the City's PMO and potentially the Steering Committee will review the draft responses. Feedback will be captured and revisions will be made before the document is finalized and distributed by City purchasing staff either directly or via the bid services based upon methods described in the RFP.

## **2. Analyze Proposals and Select Semi-Finalists**

Vendors will be instructed to complete the forms in the RFP and return them on CD with their proposals. Through a semi-automated process we have successfully used numerous times, we will then tabulate the responses to the hundreds of application specifications that will be included in the RFP. A percent compliance will be calculated and incorporated into a proposal comparison template we have developed. When combined with a variety of other comparative criteria gathered from the proposals, the template automatically calculates a blind numerical ranking of each. This eliminates any bias from influencing the selection process. The templates will allow the City to measure each vendor on:

- Conformance with the specifications
- Software licensing costs (including core and non-core components)
- Hardware purchase costs
- Implementation, training, conversion, and modification services costs
- On-going support costs
- Contract terms and implementation schedule compliance
- General background criteria (e.g., number of installations, historical financial performance, number of support staff, platforms supported, etc.)

As part of this initial analysis, we will assess each of the vendors' solutions and meet with the City to present the comparative proposal analysis. Together, we will use the decision-making process determined above to select the two or three most qualified vendors who may be subjected to the due diligence tasks described in the following work plan tasks.

## **3. Assist in Developing Vendor Demonstration Materials and Other Due Diligence Templates**

We will assist the City in the development of material to use during the vendor demonstration and due diligence activities including:

- Vendor demonstration agenda
- Letters to send to those vendors who are proceeding forward upon receipt of their RFP responses as well as letters to send to those vendors whose solutions are not being considered based on initial review of their RFP responses
- Forms to document vendor information during the vendor demonstrations, reference checking and potential site visit processes

We can also work with the City in the development of detailed demonstration scripts that are intended to direct the vendor demonstrations towards the needs of the City. These scripts are intended to have the vendors demonstrate their products according to desired financial processes within the City such that staff can understand not only whether the vendor's product will support their financial processes but also how well the product can support their financial processes. Furthermore, these scripts allow for a more standardized process from which to compare the vendors.

#### **4. Schedule and Conduct Vendor Demonstrations**

On behalf of the City, we will prepare and guide how to facilitate the software demonstrations by providing logistic advice, agendas and scripts. We would also anticipate participating for up to three days of on-site attendance at the demonstrations. The demonstrations will be held at the City and should include a cross-section of staff from the City. Evaluation forms will also be provided as checklist for scoring each vendor's performance and functionality. We would envision conducting a debrief discussion with the City PMO team after the demonstrations to review the results of the evaluation.

#### **5. Conduct Additional Due Diligence Activities**

In addition to vendor demonstrations, there are a number of activities that the City can undertake to conduct additional due diligence on the finalist vendors including:

- We will provide forms to the City if City staff wishes to conduct site visits to comparably sized and complex installations to review the installation of the vendor's software. We will provide the City with detailed checklists of issues and items to discuss and score during the site visits. Note that as a result of the demonstrations, it may be possible to eliminate one of the vendors, thereby reducing the number of site visits required.
- We will provide forms to the City for reference checking to assess how well others have adapted the semifinalists' systems to their needs, and identify issues to address during contract negotiations. We have found that having City staff contact their peers at the reference sites results in more productive and informative conversations. As such, we will oversee the reference checking and site visit process, but not perform the checking ourselves.
- The City may conclude to perform other additional due diligence, as necessary to evaluate and consider the value of specific components of the vendor proposals.

#### **6. Assist in the Selection of a Preferred Vendor**

We will meet with the City to review the due diligence information gathered. It is possible that there may be a need to have the final two vendors conduct a final software demonstration to City staff that will focus on very specific areas of review.

In our experience, due diligence activities conducted after vendors have responded to an ERP RFP provide further understanding for the client as to what is being offered by the software vendors as well further understanding by software vendors as to the needs of the client. We would propose that the semi-finalist vendors be requested to provide a clarification response to their original RFP to address specific questions that the City has related to their solution to include a final cost proposal.

Together, based on those demonstrations, vendor proposals and other due diligence activities, we will review and discuss the semi-finalist vendors overall solution and facilitate up to two meetings with the Project Steering Committee to proceed forward with making a decision on a finalist vendor using the decision-making process developed previously. At the City's request, we will develop a synopsis of the entire system selection process for the City to present to the Board of Commissioners along to support



the Committee's finalist recommendation, intending to gain concurrence from Board of Commissioners to proceed with contract negotiations.

## **7. Support the City's Contract Negotiations including Developing Statement of Work (SOW)**

We will review the license and support agreements provided by the primary finalist vendor and propose recommended changes to the contract. We will participate with the City via phone in planning the negotiations with the primary finalist vendor. Contractual terms, conditions, and costs will be reviewed with the goal in mind of recommending contract language changes designed to protect the City's long-term interests. A draft of the final license and support agreements will be presented to the City's legal counsel for their review. Terms and conditions relating to term and termination of the agreements, purchase and support costs, caps on price increases, recourse for non-performance by the vendor, software acceptance criteria, rights to the source code if vendor declares bankruptcy, warranties and incorporation of the vendor's response to the RFP, governing law, insurance coverage requirements, rights to major new releases, payment terms tied to major deliverables, controls over expenses, development of an implementation plan, on-going support criteria, etc., will be reviewed. The City will conduct vendor negotiations and make all management decisions.

During this activity, the City will need to determine and conclude on the specific scope of software, services and optional items which it will purchase from the finalist vendor(s). As part of this activity we will also review work the Statement of Work (SOW) developed by the selected software vendor and provide input to the City for consideration before finalizing.

### **5. Describe your actual experiences in dealing with "cultural change management" in ERP implementations.**

Nearly all of the ERP projects we are involved with include some element of formal or informal change management activities. These activities are more critical with those clients who are migrating from technologies and processes that date back several years or have an organizational culture that is more resistant to change.

For a recent client, we started on an ERP selection and implementation project in which the client had embedded technologies and business processes that had been around for a number of years. Overall concern was expressed about the acceptance of a new ERP system and what significant changes that were going to entail particularly around the roles and responsibilities of many of the staff members involved in working with the system.

During the selection phase of the project, we worked closely with their Readiness team that had responsibilities for Communications, Change Management and Training to strategize on ways in which to facilitate the client's transition to a new ERP environment. A number of methods were used to include the following:

- Educational outreach was provided through the establishment of a Microsoft Office SharePoint site that had an internal focus to client staff involved on the project as well as an external focus to all client staff who would be affected by the new system. The externally focused site allowed any staff person to obtain information about the project that included a glossary of terms, presentations regarding the project, frequently asked questions, project timelines and other pertinent information on the project.

- Project teams consisted of both process owners and process end-users from the client departments such that they would take ownership of the new system and the new processes.
- A Project Risk Assessment was conducted to identify project risks and mitigation strategies that included a number centered on communications and change management

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During the implementation phase of the project, the selected ERP vendor provided a change management resource to work with the client's Project Management Office (PMO) and Readiness Team to facilitate additional change management and communications activities. The Readiness Team included a Readiness Coordinator, a couple of staff to work with the Readiness Coordinator and Readiness Coaches that existed within each of the departments. These Readiness Coaches were assigned specific project responsibilities that also included being the "eyes and ears" within the department and acting as a conduit of information between the project and the departments. Additionally, the functional teams continued with significant involvement from process owners and process end-users. As significant decisions were made during the course of the project, existing governance structures were used as a forum for communicating the system and process changes that would be occurring well in advance of the actual implementation and cut-over activities.

Overall, these activities contributed to acceptance of both the system and process changes that were eventually implemented.

6. Describe your company's approach and methods for retaining a stable consulting staff. Include processes you have in place for motivating your staff to perform at their maximum capability. Also, address plans you have for ensuring technical competence in a changing technological environment.

Plante Moran is proud to be on FORTUNE Magazine's 100 Best Companies to Work for 15 straight years. One of the reasons we have been able to accomplish this has been our outstanding track record relative to staff development and retention.

Plante Moran has developed and implemented a Performance Management System which emphasizes both skill development (competencies) and results. Every staff prepares a career development plan (CDP) which emphasizes areas of skill development and results they are working toward. For every project, the project manager prepares a project performance assessment (PPA) for project staff, which rates and provides constructive feedback relative to targeted skill development areas. Mid-year and annual career planning sessions are conducted with staff to discuss their competency development and results versus plan.

One of the areas for skill development is technical competency. Technical competency is crucial to the development of our staff and our clients' success. Areas of focus for technical competency include: industry, methodology / tools, and technology. All staff select specific areas of technical competency development and tailor a training plan encompassing continuing professional education (CPE) credit. All staff must fulfill specific CPE requirements based on professional service organization standards.

Our consultants and, more importantly, senior staff on our project team take significant pride and ownership in ensuring that the services provided to our clients achieve the highest level of satisfaction and quality results. Our consultants are engaged with all levels of staff from Executive Sponsors to line staff who are executing the various ERP related processes. Evidence of our ability to take leadership and ownership of the project's success is exhibited in a number of ways as follows:

- We are increasingly being requested by clients for whom we have provided ERP selection services to also assist in providing ERP implementation management services.
- We have been involved with a number of clients in performing multiple software engagements for ERP and other software selection projects.

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Additional steps that we perform to achieve client satisfaction are as follows:

- Staff will be assigned to the project that have significant experience in other public sector ERP-related projects from needs assessment through implementation management who also have deep knowledge of municipal operations
- Frequent communications with the client through status meetings and other methods of communication
- Significant project management capabilities to ensure that the project is completed on-time, within budget and achieves the overall goals and objectives of the project

We perform a number of activities to ensure on-going technical competence in a changing technological environment:

- **Regular Communications with ERP Vendors** – As noted in our response in Tab 5, we have regular meetings and calls with the ERP vendors to discuss changes in their software, technology environment and services.
- **Participation in Association Activities** – Our involvement with GFOA, PTI and ICMA provides us with the opportunity to discuss the changing ERP vendor landscape in terms of current and future trends. For example, we had a number of meetings with the ERP vendors at the National GFOA show in San Francisco to discuss upcoming changes in their products, technologies and service approaches.
- **On-Going Activity with Current Clients** – Through our significant and on-going activity with current clients as part of ERP procurement and ERP implementations, we are continually exposed to ERP vendor technology and product changes.
- **Industry Research** – Periodically, we conduct industry research on particular topics of interest related to the ERP environment. This has included research on Managed Services options as well as mobility options available within the Tier 2 ERP vendor marketplace.

7. In your opinion, what are the top five critical success factors (in priority order with #1 being most important) in an ERP project in the public sector? Discuss how you would help the City of Fort Lauderdale deal with each of these to mitigate the risk of failure.

The following list represents what we believe are the critical success factors relative to an ERP initiative. These factors are directly tied to the significant problems that we have seen during ERP implementations where these CSFs are lacking as noted in Question #2 above.

1. **Obtain Visible Executive Level Sponsorship** – Without a strong level of visible executive sponsorship on the project, challenges faced by the project team in terms of changing business practices, obtaining necessary resources from the organization and working through staff change management issues will be extremely challenging. Our assistance to the City in this area would be as follows:
  - a. Identify an individual who has a high-level of authority and responsibility within the organization to provide Executive Sponsorship on the project

- b. Review the roles and responsibilities for this individual and document as part of the Project Charter
  - c. Ensure that this individual is visible at key points during the selection and implementation phases of the project
  - d. Implement an Executive Steering Committee as part of the project that would be chaired by the Executive Sponsor
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2. **Obtain Appropriate Levels of Client Staff during the Implementation** – One of the major problems that our clients are currently facing during ERP implementations is being able to commit the necessary amount of time required to perform all of the implementation activities required. Most municipal organizations have seen their staffing levels reduced, in some cases significantly, during the economic malaise while service levels have increased. The effect of managing current operations while undertaking an ERP implementation has become overwhelming for many organizations. Our assistance to the City in this area would be as follows:

- a. Set realistic expectations as to the required level of staff implementation effort required during the early part of the selection phase of the project with executive management within the City
- b. Communicate that key decision makers will need to commit their time in a meaningful way during system implementation
- c. Request information from the vendors as part of the RFP as to expected levels of staff commitment required during the implementation phase of the project
- d. Implement an appropriate phasing of modules during system implementation that is achievable within current staffing constraints
- e. Secure external contract resources to perform City activities during system implementation for certain technical and business areas
- f. Determine if recent retirees can be contracted back to the City to provide backfill to existing operations so key staff can be freed up for the project
- g. Defer other non-critical projects to a future timeframe
- h. Expedite initiation of implementation activities to the selection phase of the project (e.g., identification of key issues and opportunities, data cleansing, collection of documentation for use by the software vendor, etc.)

3. **Obtain Qualified and Competent Vendor Implementation Staff** – The economic malaise experienced across the country, and particularly in the state of Florida, has recently improved resulting in municipal entities being more comfortable with spending on infrastructure upgrades including major ERP initiatives. This breaking of pent-up demand has resulted in a significant level of activity in the ERP marketplace that has put significant strains on the ability for vendors to effectively implement their solution with qualified staff. Particular vendors in the Tier 2 ERP vendor marketplace have experienced recent success in selling their product but have been challenged in implementing their product. This has resulted in ERP vendors employing staff that are not familiar with the company's implementation approach or the capabilities of the product. Furthermore, we have found that the availability of these staff for follow-up questions after homework has been assigned has been extremely frustrating due to their commitment to a number of other implementations. Our assistance to the City in this area would be as follows:

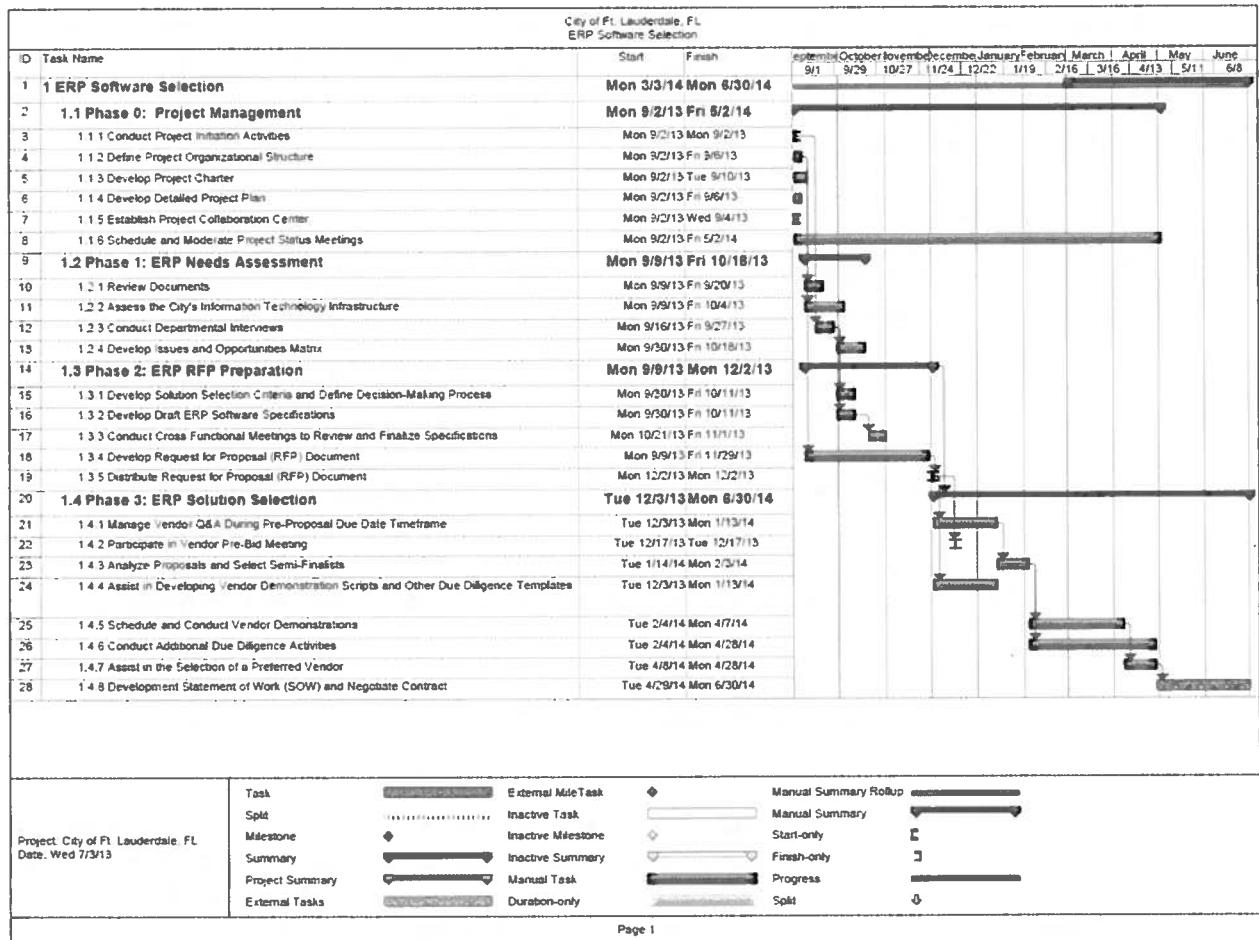
- a. During the RFP process request information on the number of implementation staff and number of current active implementations
  - b. Be able to interview and approve proposed key vendor implementation staff including the vendor project manager and functional leads
  - c. Request and conduct reference checking for key vendor staff on the project
  - d. Put protections in the contract for deficiencies due to poor implementation services (e.g., liquidated damages, ability to approve key staff, etc.)
  - e. Request resumes of ALL proposed implementation staff prior to them coming on-site to the City for any type of consulting and training sessions
  - f. Clarify during the early stages of the implementation how functional issues/questions will be addressed when the leads are physically not on-site at the City
  - g. Leverage LinkedIn to review past history of proposed implementation and training staff
  - h. Execute other implementation-related activities to ensure an overall smoother process
4. **Conduct Appropriate Due Diligence Activities on Potential Solutions** – Our approach with the City is intentionally very comprehensive and inclusive to achieve staff buy-in and ensure that staff go into the system implementation phase with as much knowledge as possible and clear expectations as to what is required to achieve a successful implementation. Ultimately, our goal is to obtain a Solution that is good fit for the City and will provide significant value in enhancing the various City business processes. Our assistance to the City in this area would be as follows:
- a. Implement a comprehensive governance structure during the Selection phase of the project that involves a number of staff including the establishment of module leads and teams that includes both process owners and representative process end-users
  - b. Conduct interviews with all departments to ensure that their needs are listened to and incorporated into the process
  - c. Identify an evaluation process and scoring methodology that reflects the needs and priorities of the City
  - d. Involve business staff at a variety of points within the software selection phase including:
    - Involvement in departmental interview
    - Review and approval of functional specifications
    - Review of the Issues and Opportunities matrix
    - Development of vendor demonstration scripts
    - Analysis of the appropriate sections of the ERP vendor responses
    - Participation in vendor demonstrations
    - Participation in site visits and reference checking
  - e. Provide insight into the products, services and technologies that are being proposed by the responding vendors based on our industry involvement.
5. **Negotiate a Comprehensive Statement of Work (SOW) and Contract** – Having been involved with a large number of ERP selections and implementation projects we are well aware of the items that will arise during system implementation that will be governed by the SOW and contract. As a result, we have a very strong perspective as to the importance of developing a comprehensive

Statement of Work (SOW) and negotiating a contract that protects the financial and other interests of the City. Our assistance to the City in this area would be as follows:

- a. During the selection phase of the project, we will institute the concept of a Solution Gap Log that incorporates gaps between the selected Vendor's solution and the needs of the City as input into the SOW and contracting phase
  - b. We will leverage our SOW checklist that we have refined through several other projects to ensure that the scope of software, hardware and services is adequately addressed in the SOW
  - c. Having negotiated contracts for nearly 30 years, we have a number of contract provisions that we would recommend including with specific ones that have been developed for certain Tier 2 vendors that we have negotiated with in the past
8. Statement of proposed services timetable and availability: Should respond to scope of work. Provide a summary of timetable and availability of proposer to prioritize the City's project. Timetable shall cover the total hours provided in the financial proposal section.

The MS Project Plan on the following page depicts a proposed timeline that can be adjusted based on the specific needs of the City. We have the required staffing for the project to satisfy the activities and timelines proposed.

PROPOSAL TO PROVIDE ENTERPRISE RESOURCE PLANNING CONSULTING



## 7. Cost Proposal Page

**NOTICE TO PROPOSER: This Cost Proposal MUST be completed EXACTLY as required.**

Consultant will perform the Scope of Services on a Phased approach and a fixed Hourly Fee Schedule. Any additional services authorized by the City of Fort Lauderdale shall be billed utilizing an Hourly Fee Schedule.

**All costs including travel are to be included in your proposal. The City will not accept any additional costs.**

The proposed cost and the submitted technical proposal associated with this cost shall remain valid for at least 120 days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any resulting contract between the Proposer and the City.

### 1. Cost per phase/time frame

Phase I	\$ <u>31,950</u>	Estimated Hours & Duration <u>142 (9/9/13 – 10/18/13)</u>
Phase II	\$ <u>23,400</u>	Estimated Hours & Duration <u>104 (9/9/13 – 12/2/13)</u>
Phase III	\$ <u>52,200</u>	Estimated Hours & Duration <u>232 (12/3/13 – 6/30/14)</u>

**TOTAL COST OF ALL PHASES**    \$ 107,550

### 2. Firm, Fixed Hourly Fee for Additional Services performed outside the RFP Scope of Work.

\$ 225 /Hr.

3. Proposer agrees to reimbursement for per diem expenses on travel, lodging, and any other travel related expense **outside the Scope of Services**, which are approved in advance by the City of Fort Lauderdale's Project Manager, in accordance with the City policies and limits. **A copy of the Travel Policy may be obtained by visiting the City of Fort Lauderdale's web site at:**

[http://www.fortlauderdale.gov/purchasing/TravelPSM\\_121002.pdf](http://www.fortlauderdale.gov/purchasing/TravelPSM_121002.pdf)

Yes   X   No



## 8. References

### **City of Columbia, MO**

Mr. Tony St. Romaine  
Deputy City Manager  
701 E. Broadway  
P.O. Box 6015  
Columbia, MO 65201  
Tony@GOColumbiaMO.com  
573-874-7720

### **ERP Needs Assessment and System Selection**

Conducting a comprehensive Enterprise Resource Planning (ERP) needs assessment and selection project for the City to replace legacy applications within multiple lines of business within the City. This project included conducting of interviews with process owners and process end-users, development of an ERP RFP, proposal analysis and due diligence. We are currently in the initial stages of contract negotiations and statement of work development with the selected ERP vendors.

Project Timeline: May 2012 - Present

### **Broward County, FL**

Mr. John Bruno  
Chief Information Officer  
Broward County Government  
Center West Building  
1 N. University Drive  
Suite 4003A  
Plantation, FL 33324-2019  
954-357-8821  
jbruno@broward.org

### **ERP Selection**

Assisting the County in conducting due diligence related to the review of a comprehensive ERP RFP including Financials and HR/Payroll solutions. Activities include development of the RFP, analysis of proposal responses, development of vendor demonstration scripts, coordination of vendor demonstrations and reference checking activities, comprehensive pricing and cost analysis development, assessment of the County IT function to support the implementation and on-going support of a new ERP and assistance in preparing material for presentation to the various County committees and County Board.

Project Timeline: July 2011 – Present

### **City of Mesa, AZ**

Ms. Diane Gardner  
Chief Information Officer (CIO)  
200 South Center Street  
Building 2  
P.O. Box 1466  
Mesa, AZ 85211-1466  
480-644-3449  
Diane.Gardner@mesaaz.gov

### **ERP Needs Assessment and Software Selection**

Assisted the City in the conducting of an ERP needs assessment and software selection project for the replacement of existing legacy applications. Subsequent to the selection phase of the project, we were engaged to develop a statement of work (SOW) and negotiate a contract with the selected ERP vendor. We then Assisted the City in the implementation of the selected ERP solution as part of the city's project management office (PMO). We also had direct project management responsibility for a number of implementation teams.

Project Timeline: April 2009 – September 2012

**City of Cleveland, OH**

Mr. Jim Gentile, Controller  
216-664-3871

Kathleen Woidke, PMO  
216-664-2262

601 Lakeside Avenue  
Room 104  
Cleveland, OH 44114

**FMIS Software Selection**

Assisted the City in the conducting of a Financial Management Information System (FMIS) needs assessment and software selection project to replace an existing legacy FMIS application. We then assisted the City in the implementation of the selected FMIS by providing project management assistance, including PMO support, project administration, and business analysis services. Project included of a 20 month engagement providing multiple consulting team staff to support various City functional and technical teams with change management processes.

Project Timeline: October 2006 – Feb 2010

**City of Alexandria, VA**

Mr. Tom Gates  
Assistant City Manager  
City of Alexandria  
301 King Street  
Alexandria, VA 22314  
P: 703-727-9701  
tom.gates@alexandriava.gov

**ERP Needs Assessment and System Selection**

Conducted a needs assessment in order to provide a cost/benefit and return on investment analysis with respect to implementing a new ERP application. Activities included: interviews, data collection, benchmarking, and cost analysis.

We then assisted the City with the selection of an ERP system.

Project Timeline: August 2010 – June 2011

**City of Corpus Christi, TX**

Mr. Michael Armstrong  
CIO  
1201 Leopard Street  
Corpus Christi, TX 78401  
361-826-2489

**ERP Needs Assessment and System Selection**

Conducting a comprehensive Enterprise Resource Planning (ERP) needs assessment and selection project for the City to replace legacy applications within multiple lines of business within the City. This project included conducting of interviews with process owners and process end-users, development of an ERP RFP, proposal analysis, due diligence assistance and contract negotiations and statement of work development with the selected ERP vendor.

Project Timeline: Oct 2012 – June 2013

michaelar@cctexas.com

**City of Asheville, NC**

Mr. Jonathan Feldman  
Director of Information  
Technology  
70 Court Plaza, 3rd Floor  
Asheville, NC 28801-3507

**ERP Needs Assessment, System Selection and Implementation Management**

Assisted the City with an assessment of existing ERP systems and future ERP requirements. Incorporated future needs and related services into an ERP request for proposal, solicitation and analysis of proposals, due diligence analysis of proposed solutions, selection of a finalist, and negotiations of license and support agreements. Subsequently, assisted the City in the implementation of the selected ERP solution by providing implementation management support and oversight.

We then assisted the City with the selection of a Development Services software system. System requirements included planning and zoning, plan review, permitting, inspections and code enforcement.

Project Timeline: Oct 2007 – Sep 2011

**City of Roswell, GA**

38 Hill St.  
Roswell, GA 30075

Mr. Michael Fischer  
Deputy City Administrator  
770-594-6190

Ms. Mishelle Rutledge  
IT Director  
770-594-6401

**ERP System Selection and Implementation Management Assistance**

Assisted the City in the selection of a new general government ERP software and separate public safety CAD and RMS software selection effort. Activities included conducting of interviews, RFP development, proposal analysis and assistance to the city in the due diligence process of reviewing various solutions, contract negotiations with the selected vendors and development of a statement of work. Provided project management assistance to the City's project management team associated with deployment of the initial phase of the selected ERP solution.

Project Timeline: 2010 - 2012

# 9. Experience with Fort Lauderdale

Plante Moran has no contracts or agreements with the City during the past three (3) years.

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## 10. Attachments

Attached are our standard terms and conditions for consideration by the City.

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### Professional Services Agreement – Consulting Services Addendum to Plante Moran, PLLC Engagement Letter Dated July 3, 2013

This Professional Services Agreement is part of the engagement letter for our consulting services dated July 3, 2013 between Plante Moran, PLLC (referred to herein as "P&M", "we", "our" or "us") and City of Ft. Lauderdale, FL (referred to herein as "City", "you" and "your").

1. **Management Responsibilities** – The consulting services we will provide are inherently advisory in nature. We have no responsibility for any management decisions or management functions in connection with our engagement to provide these services. Further, you acknowledge that **the City** is responsible for all such management decisions and management functions; for evaluating the adequacy and results of the services we will provide and accepting responsibility for the results of those services; and for establishing and maintaining internal controls, including monitoring ongoing activities, in connection with our engagement. You have designated [Name], City Project Manager to oversee the services we will provide.
2. **Nature of Services** – Our **project activities** will be **based on** information and records provided to us by **the City**. We will rely on such underlying information and records and our **project activities** will not include audit or verification of the information and records provided to us in connection with our **project activities**.

The **project activities** we will perform will not constitute an examination or audit of any **City** financial statements or any other items, including **the City's** internal controls. This engagement also will not include preparation or review of any tax returns or consulting regarding tax matters. If you require financial statements or other financial information for third-party use, or if you require tax preparation or consulting services, a separate engagement letter will be required. Accordingly, you agree not to associate or make reference to P&M in connection with any financial statements or other financial information of **the City**. In addition, our engagement is not designed and cannot be relied upon to disclose errors, fraud or illegal acts that may exist. However, we will inform you of any such matters that come to our attention.

3. **Use of Report** – At the conclusion of our project activities, we will provide you with a written report as described in the engagement letter. Our report will be restricted solely to use by management of **the City** and you agree that our report will not be distributed to any outside parties for any purpose other than to carry out legal responsibilities of **the City**. We will have no responsibility to update our report for any events or circumstances that occur or become known subsequent to the date of that report.
4. **Confidentiality, Ownership and Retention of Workpapers** – During the course of this engagement, P&M and P&M staff may have access to proprietary information of **the City**, including, but not limited to, information regarding trade secrets, business methods, plans, or projects. We acknowledge that such information, regardless of its form, is confidential and proprietary to **the City**, and we will not use such information for any purpose other than our consulting engagement or disclose such information to any other person or entity without the prior written consent of **the City**.

In some circumstances, we may use local or international third-party service providers or P&M affiliates to assist us with our engagement. In order to enable these service providers to assist us in this capacity, we must disclose information to these service providers that is relevant to the services they provide. Disclosure of such information shall not constitute a breach of the provisions of this agreement.

In the interest of facilitating our services to you, we may communicate or exchange data by internet, e-mail, facsimile transmission or other methods. While we use our best efforts to keep such communications and transmissions secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications or transmissions once they have been sent, and consent to our use of these electronic devices during this engagement.

Professional standards require that we create and retain certain workpapers for engagements of this nature. All workpapers created in the course of this engagement are and shall remain the property of P&M. We will maintain the confidentiality of all such workpapers as long as they remain in our possession.

## PROPOSAL TO PROVIDE ENTERPRISE RESOURCE PLANNING CONSULTING

Both **the City** and P&M acknowledge, however, that we may be required to make our workpapers available to regulatory authorities or by court order or subpoena. Disclosure of confidential information in accordance with requirements of regulatory authorities or pursuant to court order or subpoena shall not constitute a breach of the provisions of this agreement. In the event that a request for any confidential information or workpapers covered by this agreement is made by regulatory authorities or pursuant to a court order or subpoena, we agree to inform **the City** in a timely manner of such request and to cooperate with **the City** should you attempt, at your cost, to limit such access. This provision will survive the termination of this agreement.

We reserve the right to destroy, and it is understood that we will destroy, workpapers created in the course of this engagement in accordance with our record retention and destruction policies, which are designed to meet all relevant regulatory requirements for retention of workpapers. P&M has no obligation to maintain workpapers other than for its own purposes or to meet those regulatory requirements.

Upon **the City's** written request, we may, at our sole discretion, allow others to view any workpapers remaining in our possession if there is a specific business purpose for such a review. We will evaluate each written request independently. You acknowledge and agree that we will have no obligation to provide such access or to provide copies of our workpapers, without regard to whether access had been granted with respect to any prior requests.

- 5. Fee Estimates** – In any circumstance where we have provided estimated fees, fixed fees or not to exceed fees, these estimated, fixed or not-to-exceed fees are based on **the City's** personnel providing P&M staff the assistance necessary to satisfy **the City's** responsibilities under the scope of services. This assistance includes availability and cooperation of those **City** personnel relevant to our project activities and providing needed information to us in a timely and orderly manner. In the event that undisclosed or unforeseeable facts regarding these matters causes the actual work required for this engagement to vary from our estimates, our estimated fees will be adjusted for the additional time we incur as a result.

In any circumstance where our work is rescheduled, we offer no guarantee, express or implied, that we will be able to meet any previously established deadline related to the completion of our work. Because rescheduling our work imposes additional costs on us, in any circumstance where we have provided estimated fees, those estimated fees may be adjusted for additional time we incur as a result of rescheduling our work.

Any fee adjustments will be determined in accordance with the Fee Adjustments provision of this agreement.

- 6. Payment Terms** – Our invoices for professional services are due upon receipt unless otherwise specified in our engagement letter. In the event any of our invoices are not paid in accordance with the terms of this agreement, we may elect, at our sole discretion, to suspend work until we receive payment in full for all amounts due or terminate this engagement. In the event that work is suspended, for nonpayment or other reasons, and subsequently resumed, we offer no guarantee, express or implied, that we will be able to meet any previously established deadlines related to the completion of our consulting work or issuance of our consulting report upon resumption of our work.
- 7. Fee Adjustments** – Any fee adjustments for reasons described in this agreement will be determined based on the actual time that P&M staff expend at our **standard hourly rates**, plus all reasonable and necessary travel and out-of-pocket costs incurred, and included as an adjustment to our invoices related to this engagement. You acknowledge and agree that payment for all such fee adjustments will be made in accordance with the payment terms provided in this agreement.
- 8. Termination of Engagement** – This agreement may be terminated by either party upon written notice. Upon notification of termination, our services will cease and our engagement will be deemed to have been completed. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination of this engagement.
- 9. Hold Harmless and Indemnification** - As a condition of this engagement, **the City** agrees to hold P&M, and all of its partners and staff, harmless against any losses, claims, damages, or liabilities, to which P&M may become subject in connection with services performed in the engagement, unless a court having jurisdiction shall have determined in a final judgment that such loss, claim, damage, or liability resulted primarily from the willful misconduct or gross negligence of P&M, or one of its partners or staff. This hold harmless includes the agreement to reimburse P&M for any legal or other expenses incurred by P&M, as incurred, in connection with investigating or defending any such losses, claims, damages, or liabilities. This provision shall survive any termination of this engagement.

10. **Conflicts of Interest** - Our engagement acceptance procedures include a check as to whether any conflicts of interest exists that would prevent our acceptance of this engagement. No such conflicts have been identified. You understand and acknowledge that P&M may be engaged to provide professional services, now or in the future, unrelated to this engagement to parties whose interests may not be consistent with yours.
11. **Agreement Not to Influence – The City** and P&M each agree that each respective organization and its employees will not endeavor to influence the other's employees to seek any employment or other contractual arrangement with it, during this engagement or for a period of one year after termination of the engagement. **The City** agrees that P&M employees are not "contract for hire." P&M may release **the City** from these restrictions if **the City** agrees to reimburse P&M for its recruiting, training, and administrative investment in the applicable employee. In such event, the reimbursement amount shall be equal to two hundred hours of billings at the **standard hourly rate** for the P&M employee.
12. **Governing Law** – This agreement shall be governed by and construed in accordance with the laws of the State of **Michigan**.

### **End of Professional Services Agreement – Consulting Services**

**ADDENDUM NO. 1**

RFP 735-11244

Consulting Services for an Enterprise Resource Planning System (ERP)

ISSUED June 4, 2013

1. This addendum is being issued to make the following changes:

A. Bid Description on the title page is changed to read;  
**The City of Fort Lauderdale, Florida is seeking proposals from qualified proposers, for services of a professional Consultant to assess the City's comprehensive software needs and assist City staff in selecting an enterprise resources planning (ERP) system in accordance with the terms, conditions, and specifications contained in this Request for Proposals.  
For a copy of the RFP go to [www.bidsync.com](http://www.bidsync.com).**

B. Part I – Information, Section 01. Purpose is changed to read;  
**The City of Fort Lauderdale, Florida (City) is seeking proposals from qualified proposers, for services of a Professional Consultant to assess the City's comprehensive software needs, develop a RFP for an Enterprise Resources Planning (ERP) system for distribution to potential vendors, participate in the evaluation of proposals with the objective of providing a shortlist of the top five (5) ERP vendors that would best meet the needs of the City, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).**

2. All other terms, conditions, and specifications remain unchanged.

Kirk W. Buffington, CPPO, C.P.M. MBA  
Deputy Director of Finance

Company Name: Plante & Moran, PLLC  
(please print)

Bidder's Signature: E. Scott Eiben

Date: July 3, 2013



## **11. Subcontractors**

Plante Moran will not be using any subcontractors on the project.

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{Thank You!}

plante  
*m*  
moran

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For more information contact:

Scott Eiler, Partner  
248.223.3447

Scott.Eiler@plantemoran.com

plantemoran.com

Proposal to Provide Consulting Services  
for an Enterprise Resource Planning  
System (ERP) – Best and Final Offer  
(BAFO)

CITY OF FT. LAUDERDALE, FL | AUGUST 27, 2013

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August 27, 2013

Mr. Richard Ewell, Procurement Specialist II  
City of Fort Lauderdale  
Procurement Services Division  
100 N. Andrews Avenue, Room 619  
Ft. Lauderdale, FL 33301

Dear Mr. Ewell:

Plante Moran is pleased to present this Best and Final Offer (BAFO) to the City of Ft. Lauderdale to provide Enterprise Resource Planning (ERP) consulting services. Given our many years of experience on a large number of similar projects, we are confident that we can deliver significant value to the City on this engagement. We understand the complexities involved with this undertaking and are prepared to assist the City to ensure the overall success of this project. Per our meeting with the Selection Committee on Monday, August 26, 2013 we wanted to ensure that a few items within our proposal are clarified:

- The scope of functional areas to be reviewed includes the areas of Financials, Human Resources/Payroll and CRM as well as the need to document integration needs and requirements between these areas and other related systems within the City (e.g., Kronos, NeoGov, Cayenta, etc.).
- We have reviewed the City's terms and conditions and have no exceptions.
- We have provided additional hours in our proposal to provide on-site facilitation for up to five vendor demonstrations.
- We are flexible as to the timing of when the services would be provided based on the other demands placed on City staff. We would anticipate working with the City project management team at the start of the project to identify the project staff and their expected level of commitment required on the project. Based on these discussions, we would then develop a schedule that would likely last between 7 – 12 months in duration from project kick-off to negotiation of a contract and statement of work with the selected ERP vendor.
- Having performed the requested services for a significant number of other municipal clients for nearly 30 years, we are fully confident in the level of effort proposed to the City and will provide these services under a fixed price contract.

We would welcome the opportunity to be of service to the City of Ft. Lauderdale on this very important project and feel that our significant ERP experiences with other municipal clients in the State of Florida and across the country should provide confidence in our ability to provide a high quality of services. If you have any additional questions, please do not hesitate to contact me at 248-223-3447 or at [Scott.Eiler@plantemoran.com](mailto:Scott.Eiler@plantemoran.com).

Very truly yours,



E. Scott Eiler  
Partner

**BEST AND FINAL COST PROPOSAL**

**NOTICE TO PROPOSER: This Cost Proposal MUST be completed EXACTLY as required.**

Consultant will perform the Scope of Services on a Phased approach and a fixed Hourly Fee Schedule to complete the requirements of the RFP. Any additional services outside the scope of the RFP, authorized by the City of Fort Lauderdale shall be billed utilizing an Hourly Fee Schedule.

**All costs including travel are to be included in your proposal. The City will not accept any additional costs.**

The proposed cost and the submitted technical proposal associated with this cost shall remain valid for at least 120 days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any resulting contract between the Proposer and the City.

**1. Cost per phase/time frame**

Phase I	<u>\$30,580.00</u>	Estimated Hours & Duration <u>139 hrs. 8 weeks</u>
Phase II	<u>\$22,000.00</u>	Estimated Hours & Duration <u>100 hrs. 10 weeks</u>
Phase III	<u>\$78,980.00</u>	Estimated Hours & Duration <u>359 hrs. 7 months</u>

**TOTAL COST OF ALL PHASES TO COMPLETE THE REQUIREMENTS OF THE RFP**

**\$131,560.00**

**2. Firm, Fixed Hourly Fee for Additional Services performed outside the RFP Scope of Work.**

\$ 220 /Hr.

3. Proposer agrees to reimbursement for per diem expenses on travel, lodging, and any other travel related expense **outside the Scope of Services**, which are approved in advance by the City of Fort Lauderdale's Project Manager, in accordance with the City policies and limits. A copy of the Travel Policy may be obtained by visiting the City of Fort Lauderdale's web site at:

[http://www.fortlauderdale.gov/purchasing/TravelPSM\\_121002.pdf](http://www.fortlauderdale.gov/purchasing/TravelPSM_121002.pdf)

Yes  No

Proposer: Plante & Moran, PLLC

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

## Richard Ewell

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**From:** Scott Eiler <Scott.Eiler@plantemoran.com>  
**Sent:** Wednesday, August 28, 2013 9:08 AM  
**To:** Richard Ewell  
**Cc:** Mike Riffel  
**Subject:** RE: ERP Consultant BAFO Question

Richard:

I plan on dropping off our BAFO response to the City later this morning. Although not specifically addressed in our BAFO, I wanted to ensure the selection committee that our review will include an identification of ALL systems related to ERP that includes core systems and "shadow systems" (i.e., Access databases, Excel spreadsheets, etc.) and their resolution as part of the selection process. This includes identifying both the future state of these systems as well as potential interfacing to these systems if they fulfill a specific niche need that is not offered up by ERP vendors. Additionally, we intend to review and identify other non-ERP applications that are likely candidates for integration to the ERP system.

Thanks again.

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**From:** Scott Eiler  
**Sent:** Tuesday, August 27, 2013 9:50 AM  
**To:** Richard Ewell  
**Cc:** Mike Riffel  
**Subject:** ERP Consultant BAFO Question

Richard:

Mike and I appreciated the opportunity to meet with you and the other members of the ERP selection committee yesterday. As a follow-up question, how many copies of the BAFO submission should we provide back to the City.

Thanks

**Scott Eiler | Partner, Management Consulting | Governmental Technology & Operations**  
Plante Moran, PLLC, 27400 Northwestern Highway, Southfield, MI 48034

Direct Dial: 248.223.3447  | Mobile: 248.207.7376  | Fax: 248.603.5618 

[Plante Moran](#) | [Twitter](#) | [Facebook](#) | [LinkedIn](#)

Firm URL: [www.plantemoran.com](http://www.plantemoran.com) | <mailto:Scott.Eiler@plantemoran.com>

Celebrating 15 years as one of FORTUNE magazine's "100 Best Companies to Work For"

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