

RFP NO. 2017-1629
CONTRACT FOR THE PROCUREMENT AND INSTALLATION OF AN
ENTERPRISE RESOURCE PLANNING SYSTEM
PART V. EVALUATION CRITERIA AND PROCESS

1.0 OVERALL PROPOSER EVALUATION CRITERIA

1.1 OVERALL PROPOSER EVALUATION AND CRITERIA

The evaluation committee will select a best solution based on a weighted scoring system. The following table presents the scoring criteria to be used.

The CITY reserves the right to make any award, group of awards, or no award as it determines in its sole discretion is in the best interests of THE CITY due to pricing, reliability, service integration, past performance, or other factors.

EVALUATION CRITERIA AND PHASES

Phase	Weight	Criteria
1: Proposal Evaluation	250	<p><u>Ability to Meet Functional and Technical Requirements</u></p> <ol style="list-style-type: none"> 1. Is the software solution designed for public sector functionality? 2. How does the software help us meet our business needs and goals? 3. Can the solution manage extensive financial activity? For example, journal entries, utility billing, tax calculations, AR, scheduled payments, etc.? 4. Describe the system’s dashboard and reporting capabilities, including standard and demand reports, custom reporting and ease of report modification (e.g. changing constraints). Can reports be auto generated and emailed to requested users? How is this process managed? 5. How does the system record user interaction and create an auditable trail of user activity?

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Phase	Weight	Criteria
		<p>6. What is your process for layered security (e.g. Casual user, presentation, network administrator?) How does the system interface with API's, online portals, remote access and other third party software)</p> <p>7. How does the system manage User Access Levels?</p> <p>8. Can your service organization provide its most recent Service Organization Control (SOC) 2 Report, related to design and effectiveness of financial reporting controls? If so, please forward.</p> <p>9. Does the system allow document templating, create auto-notifications (email) and auto-populate commonly used fields.</p> <p>10. Does the solution support mobile applications, syncing and real time system transaction activity?</p>
	150	<p><u>Cost</u></p> <p>1. Proposer must document the complete costs for licensing, installation, training and ongoing support of their proposed systems.</p> <p>2. The City reserves the right to contact vendors for cost and scope clarification at</p>

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		any time during the selection and negotiation process.
	200	<p><u>Support and Maintenance</u></p> <ol style="list-style-type: none"> 1. 6 months of physical on-site support available after 'go-live' date and virtual support at various critical times throughout the year (month end, year end, production, etc.). 2. Responsible party for support of third party applications/modules. 3. All maintenance/support costs should be listed in the cost proposal. 4. Evaluate The Proposer's hours of support operations, service levels, problem escalation process, authority for assigning problem severity and solution acceptance, and historical response times and goals, as well as anticipated requirements for ongoing internal support and maintenance labor. 5. How and when will you notify the City about any scheduled maintenance? How can the client contact you to get more information about unscheduled or extended downtime?

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Phase	Weight	Criteria
	250	<p><u>Technical Architecture</u></p> <ol style="list-style-type: none"> 1. This should include all the relevant modules that will be required to ensure coverage of the processes and requirements. 2. Provide the details of the proposed system in regards to stress load capabilities as to the number of users, types of users, etc? 3. Provide the details of how the software system accommodates other systems. For example, provide detail how your system interfaces with 3rd Party software such as Finance. 4. Auto – generated renewal notifications and ability to updated email address as needed. 5. Describe how the software solution supports online payments and IVR transactions. 6. Describe how the software provides reminders to the users and tenants. Include information on the following. 7. Does the software system allow the user to create unique warning flags within the software system for Operations tasks and department policies? 8. Provide the details of the software system’s capability to support inspections including, if applicable, the ability to auto-schedule inspections by location (supported by a map function). 9. Is the software system user-friendly and maintain consistent page formats

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Phase	Weight	Criteria
		<p>throughout. Attest that the proposed software system maintains consistent formats for screen display; or, describe and provide</p> <ul style="list-style-type: none"> a. Examples of how the software system screen display formats vary throughout the software system. <p>10. Describe how the software system allows users to see and print to any network printer.</p> <p>11. Describe how the software system selects the appropriate tables and performs calculations based on service effective dates. Include details on whether the software system automatically selects the appropriate tables based on the transaction effective date.</p> <p>12. Detail the software system’s ability to calculate retroactive and partial utility payments automatically based on updated information and effective dates.</p> <p>13. Describe how the vendor maintains compliance with legal GASB and other local, City and federal governing bodies.</p> <p>14. How many years of AS/400 conversion experience do you have? Provide references of previous municipalities you converted from AS/400.</p> <p>15. Does the software communicate across modules and Flag specified business requirements in the system? Example, customer owes property taxes, system recognizes and will not allow this</p>

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		<p>customer to open new utilities. Can notifications be sent to department heads and cashiers have visibility as well. If so, please describe.</p> <p>16. Describe how one sets up specific notifications and alerts in the system. How is this process managed systematically?</p> <p>17. Can the software auto populate data fields? Are dropdowns available?</p> <p>18. Describe how your software system allows for processing.</p> <p>19. Describe the software's functionality in calculating amounts based on program rules (ie – Taxes, water and sewer, utility allowance...)</p> <p>20. Does the software system allow for document imaging and electronic storage of all file documents with attachment capabilities in all applications that are action specific and file specific to support a paperless environment? If so, please describe.</p> <p>21. Describe the accessibility of the software system. (Example - whether accessed via the internet or through software loaded onto each user's computer or mobile device, etc.)</p> <p>22. Does the vendor provide a test environment for new training and ongoing</p> <ol style="list-style-type: none"> a. Training for system enhancements and updates? If so, please describe.

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Phase	Weight	Criteria
	150	<p><u>Implementation Team Experience and Qualifications</u></p> <p>1. THE CITY seeks an implementation team that is highly qualified as well as experienced with similar implementation efforts and working with each other. THE CITY' Evaluation Committee will evaluate the proposed implementation team's overall experience, experience with the proposed software product, relevant skills and certifications, proposed onsite hours, and overall allocation of hours among key staff members.</p>
	100	<p><u>Proposer Experience and Qualifications</u></p> <p>1. THE CITY seeks a relationship with a Proposer that is viable, stable, and committed to the public sector marketplace. THE CITY' Evaluation Committee will evaluate Proposers' revenue and operating history, level of resources</p>

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Phase	Weight	Criteria
		<p>allocated to application support and development, client base, overall experience with recent experience installing the proposed software for municipalities, changes in software vendor ownership, relevance of references, terminations for default, and relationship with subcontractor(s), if applicable.</p>
	100	<p><u>Implementation and Training Approach</u></p> <ol style="list-style-type: none"> 1. THE CITY seeks an implementation and training approach that is logical, proven, and demonstrates effective use of both Proposer's and THE CITY' labor effort. It should include a clear and comprehensive approach to data migration and interface development, technical training, as well as a reasonable implementation schedule and sensible allocation of resources to accomplish the work. THE CITY' Evaluation Committee will evaluate the Proposer's approach to developing the required Deliverables defined in Section 3.3 of this RFP as well as training THE CITY' technical staff and business users.

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	100	<p><u>Project Management Methodology</u></p> <ol style="list-style-type: none"> 1. Proposer should provide a suitable project manager/team with diversified expertise to meet the RFP requirements. 2. Roles and Responsibilities – The Proposer will have to share a roles and responsibilities matrix identifying clearly the key roles and responsibilities. 3. Team RFP for implementation of ERP System at the City 4. Change Request Management - The methodology to manage changes in scope and schedule during the course of the project must be described clearly in the bid. 5. Problem Resolution and Escalation Matrix - issues during implementation of the software solution should be documented and follow a detailed escalation matrix to ensure timely resolution. The escalation matrix will provide an organized method of notifying the Proposer that an issue is not being successfully resolved at a lower level.
	150	<p><u>Thoroughness and Quality of Response</u></p> <ol style="list-style-type: none"> 1. Successfully addresses all questions and inquiries contained herein.
	150	<p><u>Compliance with Contract Provisions</u></p> <ol style="list-style-type: none"> 1. Proposal is in compliance with all contract specifications.
	1,000	Total Phase 1 Points

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Phase	Weight	Criteria
2: Shortlisted Proposer Response Evaluation	200	<u>Strategic Fit</u> <ol style="list-style-type: none"> 1. How well does the solution align overall with the requirements set forth in the RFP, as well as compliance with contract terms and conditions and any and all additional findings from THE CITY's due diligence process? 2. Will the Proposer and solution be able to adapt to changing business needs and future initiatives?
	300	<u>System Demonstration</u> <ol style="list-style-type: none"> 1. Does the solution software interface with current systems? For example AMI, IVR, Courtware. 2. Does the system interface with API's? For example, download tax digest from Fulton County website. 3. Demonstrate the Import/Export feature for including attachments such as .xls, .pdf and word documents. 4. Demonstrate User Restricted Access features. To include (Basic, Manager, Administrative) transaction authorization and view only access. 5. Demonstrate how the software creates and audit trail for transactions within the system.
	1,000	Total Phase 2 Points

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1.2 PROPOSAL EVALUATION

The Evaluation Committee will be comprised of various representatives from THE CITY departments and will evaluate responsive and responsible proposals. The Evaluation Committee may request clarifications and/or additional information from any Proposer through written correspondence. The Evaluation Committee will prepare an objective ranking of the proposals. THE CITY may, at its sole discretion, reject any or all proposals submitted in response to this Request for Proposal.

- Implementation Team Experience and Qualifications
- Project Management Methodology
- Implementation and Training Approach
- Technical Architecture
- Support and Maintenance
- Response to Technical and Functional Requirements
- Compliance Contract Provisions
- Thoroughness and Quality of Response

1.3 SHORTLISTED PROPOSER EVALUATION

SYSTEM DEMONSTRATION

Proposers will demonstrate the requested functionality of their systems during onsite demonstration onsite with THE CITY at the Proposer's option. THE CITY will consider adherence to the RFP functional and technical requirements, THE CITY' business objectives, functionality, ease of use, flexibility to meet THE CITY' needs with minimum software customization or tailoring, and capability to adapt to changing needs in the future.

STRATEGIC FIT

The CITY will evaluate proposed solutions based on overall best fit with THE CITY business goals and objectives. The Evaluation Committee will consider solution simplicity, overall alignment with the requirements set forth in the RFP, as well as compliance with contract terms and conditions and any and all additional findings from THE CITY' due diligence process.

1.4 COMPETITIVE NEGOTIATION

THE CITY retains the right to negotiate the final contract terms and conditions, to be presented to the Evaluation Board for approval, with one or more of the apparent most responsive proposers as solely determined by THE CITY.

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THE CITY reserves the right to request clarification, to conduct discussions with proposers, to request revisions of proposals, and to negotiate price changes or waive minor informalities. During the discussion period, no information will be disclosed regarding either the contents of proposals or discussions. When the Evaluation Board makes an award, the solicitation file and the proposals are a matter of public record.

1.5 BEST AND FINAL OFFER

The CITY may issue a written request for Best and Final Offers (BAFO). The request shall set forth the date, time and place for the submission of the BAFO. BAFOs shall be requested only once, unless the Director makes a written determination that it is advantageous to THE CITY to conduct further discussions or change THE CITY' requirements. The request for a BAFO shall inform Proposers that if they do not submit a notice of withdrawal or a BAFO, their immediate previous offer will be construed as their Best and Final Offer.

1.6 AWARD OF CONTRACT

Subject to the Evaluation Board approval, award will be made to the proposer whose proposal has been deemed most advantageous to THE CITY in accordance with the evaluation criteria contained in this RFP.

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2.0 PROPOSER'S EXPERIENCE AND QUALIFICATIONS

ADMINISTRATIVE REQUIREMENTS

FORM 1: SCOPE OF SOFTWARE AND SERVICES

Indicate which of the following business functions are included in your proposed software solution and whether you are proposing an on premise Licensed Software (Traditional License). Specify the applicable software vendor and software name and version.

	Traditional	
		Software Vendor, Name, and Version
BUDGETING (OPERATIONAL AND CAPITAL)	<input type="checkbox"/>	
STRATEGIC/LONG RANGE PLANNING AND FORECASTING	<input type="checkbox"/>	
COST ACCOUNTING	<input type="checkbox"/>	
BUSINESS INTELLIGENCE/DECISION SUPPORT	<input type="checkbox"/>	
ENTERPRISE DATA WAREHOUSE	<input type="checkbox"/>	

Indicate which of the following implementation services are included in your proposal by marking an "X" in the appropriate boxes below.

SERVICES		
<input type="checkbox"/>	Project Management	<input type="checkbox"/>
<input type="checkbox"/>	Installation	<input type="checkbox"/>
<input type="checkbox"/>	Technical Configuration	<input type="checkbox"/>
<input type="checkbox"/>	System Testing	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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PROPOSER EXPERIENCE AND QUALIFICATIONS

FORM 2: PROPOSER PROFILE

SOFTWARE VENDOR PROFILE

Name of company	
Company website	
Name of parent company (if applicable)	
Headquarters location (if applicable)	
Type of business (e.g., C-corp, S-corp, LLP, sole proprietor)	
Date established	
Prior fiscal year gross revenue (in U.S. dollars)	
Prior fiscal year net income (in U.S. dollars)	
Total FTEs in:	
<ul style="list-style-type: none"> • Customer and software support 	
<ul style="list-style-type: none"> • Installation and training 	
<ul style="list-style-type: none"> • Product development 	
<ul style="list-style-type: none"> • Sales, marketing, and administrative support 	

TO WHOM SHOULD CORRESPONDENCE REGARDING THIS CONTRACT BE ADDRESSED?

Individual's Name	
Company Name	
Address	
City/State/Zip	
Phone	
Fax	
Email	
Contact Person (if different from above)	

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SOFTWARE PROFILE

Name and version of proposed software	
Date of next planned software release	

Using the space below, provide a history of ownership of the proposed software and impacts resulting from any material changes.

INSTALLED CUSTOMER BASE

Number of clients with the proposed software in production	
Number of sales to clients of the proposed software within the last three years	
Number of municipalities with the proposed software in production	

FINANCIAL PROFILE

Indicate that you have attached the following documents by marking an "X" in the appropriate boxes below.

1. What entity within your enterprise's corporate structure (including parent companies, if applicable) has had the greatest total annual revenue in each of your last three completed fiscal years?

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2. Has your company filed a petition for bankruptcy protection? If yes, use the space below to provide additional details regarding the reasons and current disposition of the petition.

3. Describe any mergers or acquisitions completed by your company within the last three years.