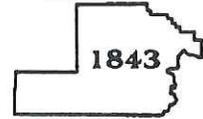


Yamhill County



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KENNETH HUFFER
COUNTY ADMINISTRATOR

JUSTIN HOGUE
BUSINESS SERVICES DIRECTOR

DATE: July 2, 2020
TO: Yamhill County Board of Commissioners and Ken Huffer, County Administrator
FROM: Justin Hogue, Business Services Director
SUBJECT: Yamhill County ERP Software Consultant RFP and Evaluation Committee Recommendation

On February 3, 2020, the County opened a Request for Proposals (RFP) process for ERP (Enterprise Resource Planning) Software Consultant. The RFP was developed in response to the County's need to replace its outdated financial management and human resources software system. For this RFP, the County solicited proposals from qualified project management professionals to help the County perform the following tasks:

- Develop functional and technical requirements for a new software system
- Prepare an RFP directed at software vendors
- Lead us through the software selection process
- Participate in contract negotiations with the selected software vendor
- Guide us through the implementation of the selected software solution

Submittals were due February 24, 2020.

Six (6) companies responded to the RFP and submitted proposals for consideration (in alphabetical order): Avero Advisors, BerryDunn, ISG, Prodware Solutions, Resource Data, and Soft Resources. The proposal from Prodware Solutions was not considered as it did not meet the mandatory RFP requirements. An evaluation committee comprised of the Business Services Director, Human Resources Manager, Information Services Manager, Finance Manager, and Assistant Finance Manager reviewed the proposals from each responsive qualified proposer and completed a scoring sheet that used the scoring method described in the RFP. Each criterion had a maximum score and the evaluation committee members scored qualified proposals using the information provided in the proposal and not as a comparison to other proposals. All scores for each separate proposer were added together and divided by the number of evaluation committee members to determine the average evaluation score for that proposal.

Of the five proposals reviewed by the evaluation committee, the top three were close enough in score to be interviewed. Interviews were originally planned for April 2020, however, COVID-19 made it necessary to reschedule and modify the format. Interviews occurred during the morning and afternoon of June 19, 2020 and conducted electronically in the Board of Commissioner's conference room using MicroSoft Teams. Each company brought a team of 2 – 6 company representatives, typically comprised of a company principle/owner, a project manager, and one or more employees specializing in change management, procurement, or information technology. For each interview, company representatives were provided 60 minutes to present information on their company background, industry experience and expertise, consultant team experience and qualifications, project strategy and approach, and change management and implementation strategies. At the conclusion of

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all the scheduled interviews, the evaluation committee tallied their respective scores and combined them with the original proposal review scores. The final scores are as follows:

	BerryDunn	ISG	Soft Resources
RFP SCORE	83.75	80.50	75.75
INTERVIEW SCORE	93.00	83.80	76.60
TOTAL	176.75	164.30	152.35

After careful consideration and as provided in the above table, BerryDunn ranked highest through the extensive evaluation process. Most notably, BerryDunn excelled in the following areas:

Company Experience: BerryDunn has considerable knowledge and experience in the field of ERP consulting. Formed as a CPA firm in 1974, they now have 21 owners and 48 principles. Of the 500 staff members they employ, 180 are assigned to their Governmental Consulting Group. They have offices in 6 states, including Arizona on the west coast. They have served over 300 state, local, and quasi-governmental clients, including 67 cities and counties within the past five years. BerryDunn has experience migrating their clients off GEMS and onto more modern platforms.

Project Management Experience: BerryDunn consultants are experienced and knowledgeable. As part of the RFP, they provided resumes for the six individuals assigned to our project that had a combined 65 years of applicable experience. Both the project manager and the senior consultant assigned to our project have worked in local government prior to joining BerryDunn. Three of the consultants are certified Project Management Professionals.

Project Strategy/Approach: BerryDunn subscribes to best practices from the Project Management Institute. They have organized our project into five phases: Project Coordination and Initiation, Requirements Analysis, RFP Development, Evaluation of Proposals, and Implementation Services.

Each phase is broken down into detailed procedural steps and staff members are assigned based on their experience and specialization. Gantt charts are used to manage the project from beginning to end to keep it on time and on budget.

Change Management Experience: BerryDunn are change management experts. Experience shows that a local government's willingness to adopt new processes and tools plays a significant role in the success, or failure, of any new system. BerryDunn observes resistance to change in virtually all their engagements, and work to proactively address this resistance utilizing best practices in the industry to educate and coach employees on their new processes. Four of the consultants assigned to our project are Certified Change Practitioners.

Cost Competitive: All proposers were asked to itemize their fee based on milestones within the project. Milestone 1 includes initial costs through the establishment of functional and data requirements, Milestone 2 includes continuing costs through the preparation, selection, and negotiation of the RFP, and Milestone 3 includes continuing costs through the implementation of a new system. Furthermore, Milestone 3 was to be further broken down into three tiers based on the level of consulting services required based on the software selected: Low-Level (advisory only), Mid-Level (moderate project management), and High-Level (active project management). Assuming active project management, cost proposals are as follows:

	BerryDunn	ISG	Soft Resources
Milestone 1	\$44,030	\$55,304	\$22,145
Milestone 2	\$30,436	\$202,640	\$62,355
Milestone 3 – High Level	\$468,288	\$563,680	\$398,400
TOTAL	\$542,754	\$821,624	\$482,900

Based on the final scoring and the information provide above, the RFP evaluation committee determined that BerryDunn was the highest scoring proposer and therefore recommends BerryDunn's selection to become the County's ERP Software Consultant. County Administration is requesting the board authorize the issuance of a Notice of Intent to Award to BerryDunn and invite BerryDunn to enter contract negotiations with Yamhill County. If contract negotiations do not result in a contract acceptable to both parties, Yamhill County will invite the second ranked proposer to enter contract negotiations. If negotiations are not successful, Yamhill County will negotiate with the third proposer. If negotiations are not successful with the third proposer, Yamhill County will cancel the solicitation.

Copies of the RFP and submitted proposals are available for review. Should there be any questions, or you require further information, please let me know.

Thank you,



Justin Hogue
Business Services Director
Yamhill County

Accepted by Yamhill County
Board of Commissioners on
7/2/2020 by Board Order
20-214