

RFP Committee Evaluation Report

Request for Proposals (RFP) #3650 for
Enterprise Resource Planning (ERP) System and
Implementation Services

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OVERVIEW

On May 8, 2019, the City of Fresno (City) released a Request for Proposal (RFP) Bid File #3650 for Request for Proposals for an Enterprise Resource Planning (ERP) System and Implementation Services. The City solicited proposals from qualified vendors offering the functionality, features and implementation services to replace the City's current PeopleSoft Financials and HRMS systems. The RFP closed on July 2, 2019 and we received 14 responses. SDI Presence was previously selected to assist in the evaluation process of proposals.

COMMITTEE

The evaluation committee consisted of Assistant City Manager Jane Sumpter, City Controller Mike Lima, Personnel Director Jeff Cardell, Chief Information Officer Bryon Horn and Information Services Manager Dennis Jones.

PROCESS STEPS

July 22, 2019

The committee was provided electronic copies of the proposals for individual review along with an understanding that we were looking for a solution that:

- Meets the City's current and future Financial and Human Resource requirements
- Streamlines business processes to take advantage of best practices through automation, integration, and workflows
- Consolidates information, links, processes, and functions, and eliminates separate departmental systems/spreadsheets
- Improves and provides necessary reports and access to data through inquiry or drill down capabilities
- Provides professional services in best practices, training, project management, implementation, integration and report development to ensure a successful implementation.

Selection based on criteria outlined in AO 6-19 with an emphasis on:

- Cost as shown on the proposal form.
- Ability to meet the stated service requirements.
- Past Performance and Experience based on References and experience shown on "Statement of Qualifications and Experience."
- Conformance to the terms and conditions of the RFP.
- Financial Stability based on information provided in the Statement of Qualifications.
- Other related information.

An administrative review of all proposals was also started by the Chief Information Officer, Information Services Manager and consulting partner from SDI Presence.

August 5, 2019

An administrative review of all proposals was completed. The evaluation committee, including the consulting partner from SDI Presence, met to discuss the committee's individual review of proposals as well as the administrative review. Based on the individual and administrative review, the committee narrowed the selection down to 5 proposals.

August 7, 2019

The evaluation committee and SDI consultant met with a team of 36 City key staff members from various City departments to provide instruction for having the staff individually review the 5 selected proposals and then provide feedback to the evaluation committee.

September 12, 2019

The evaluation committee and SDI consultant met to discuss the staff review of the 5 proposals. Based on the feedback received from City staff, the evaluation committee narrowed the selection down to 3.

September 20, 2019

The 3 finalist proposers were scheduled for weeklong Proof of Capabilities (POC) demonstrations. Scheduling was moved into 2020 due to holiday conflicts.

January 13 - 17, 2020

Representatives from Collaborative Solutions and Workday were on site at City Hall providing demonstrations of their proposed solution's capabilities to City staff from various departments. They followed the scripted demonstration agenda developed by SDI for the City. The staff participating in the demonstrations were asked to track their feedback to be provided to the evaluation committee.

January 27 - 31, 2020

Representatives from Phoenix Business Systems and SAP were on site at City Hall providing demonstrations of their proposed solution's capabilities to City staff from various departments. They followed the scripted demonstration agenda developed by SDI for the City. The staff participating in the demonstrations were asked to track their feedback to be provided to the evaluation committee.

February 10 - 14, 2020

Representatives from Tyler Technologies were on site at City Hall providing demonstrations of their proposed solution's capabilities to City staff from various departments. They followed the scripted demonstration agenda developed by SDI for the City. The staff participating in the demonstrations were asked to track their feedback to be provided to the evaluation committee.

February 19, 2020

The committee met to discuss the 3 weeks of POC demonstrations and staff feedback. Based on the POC demonstrations and staff feedback, the committee unanimously decided to move forward with checking references for Tyler Technologies.

Reference meetings held May 18th, 2020 – June 8th, 2020

May 18, 2020

The committee held a reference call with representatives from the City of Fremont, CA.

May 28, 2020

The committee held a reference call with representatives from the San Jose Unified School District.

June 1, 2020

The committee held a reference call with representatives from the City of Hartford, CT.

June 4, 2020

The committee held a reference call with representatives from St. Louis County Missouri.

June 8, 2020

The committee held a reference call with representatives from the City of Victorville, CA.

July 7, 2020

The committee met to discuss the Tyler reference calls and review the overall scope of the recommendation process. The committee agreed that Tyler Technologies was their recommendation for this RFP. The team began contract negotiations with Tyler and started

a review of the software components to be included in the solution. A process of reviewing scope of work documents with key staff was recently completed in order to get the solution ready for Council.

RECOMMENDATION

From the committee's evaluation, staff evaluation, vendor demonstrations, references and outside feedback, Tyler Technologies was chosen unanimously as the committee's recommendation. Key factors in the selection of Tyler Technologies included: a solution focused and developed exclusively for the public sector; a large body of relevant experience with California municipalities; a demonstrated record of success with many municipalities and public agencies; a demonstrated ability to meet the requirements outlined in the RFP and streamline the City's work processes; proposed costs appropriate to the estimated body of work; an ability to provide future additional solutions; and demonstrated longevity and stability as a company. The selection process carefully followed provisions and selection criteria in the City's Administrative Order for Contracts and Consultant Services (AO 6-19).