



Submitted in Response to
Request for Proposal
RFP NO. CMGR-180039-MS



BerryDunn's Proposal to Provide
IT Consulting Services
to the City of Gainesville

Proposal Submitted by:

Chad Snow, PMP, CFE, Principal
Keith Damon, PMP, Project Manager
BerryDunn
100 Middle Street
Portland, ME 04101
Phone: 207-541-2200
csnow@berrydunn.com
kdamon@berrydunn.com

Proposal Submitted on:

November 30, 2017

Letter of Transmittal

November 30, 2017

Melanie Sowers
City of Gainesville
General Government Procurement
200 East University Avenue, Room 339
Gainesville, Florida 32601

Dear Ms. Sowers:

Berry Dunn McNeil & Parker, LLC (dba BerryDunn) is pleased to submit this proposal in response to the City of Gainesville's (City's) Request for Proposals (RFP) No. CMGR-180039-MS for IT Consulting Services. We have read the RFP and associated addenda, understand their contents, and agree to the terms and conditions therein. Our proposal is a firm and irrevocable offer that is valid for 90 days from the proposal due date of November 30, 2017.


BerryDunn is an independent management and information technology (IT) consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We are a stable and well-established firm that has preserved our core values and reputation for excellence for 43 years. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states and in Canada.

As the principal of our Local Government Consulting Practice Area, I am authorized to bind BerryDunn to the commitments made herein. Should you have any questions regarding our proposal, my contact information is as follows:

Chad Snow, Principal
BerryDunn
100 Middle Street
Portland, ME 04101
Telephone/Fax: 207-541-2294
Email: csnow@berrydunn.com

We appreciate the opportunity to submit this proposal and look forward to working with the City on this important project.

Sincerely,



Chad Snow
Principal

Table of Contents

Section	Page
Letter of Transmittal	i
Table of Contents.....	ii
Project Connect – IT Consulting Firm RFP – Evaluation Criteria Format	1
1.0 Qualifications	9
1.1 Our Understanding of the City’s Project	9
1.2 Firm Overview	11
1.3 Our Experience	16
1.4 Proposed Project Team.....	23
2.0 Technical Proposal	40
Appendix A: Business Process Map Sample.....	47
Appendix B: Required Forms.....	48

Project Connect – IT Consulting Firm RFP – Evaluation Criteria Format

Please use this form to provide the requested information and pricing.

Technical	100
Written	100
Pricing	30%
Oral	100

Technical Evaluation = 100

Ability of Professional Personnel – 55 points				
Does the experience and qualifications of the key professional staff align with the EFP scope of services requested? Key staff includes the Enterprise Solution Architect and IT Technical experts	20	Has the firm done this type of work in the past? Please provide the information requested below for the last 3 projects.	Does the firm have experience working in the local government with projects of this nature?	Does the firm have experience adhering to Florida State, laws, ordinances?
Yes, please see Section 1.4 Proposed Project Team for detail.	5	Yes. Please see Section 1.3 Table 3 for a complete list of our experience performing this work. Table 2 represents our 3 most recent projects.	10	5
		Yes. Please see Section 1.3 Our Experience for detail. We would be happy to provide additional detail for any of the clients listed	15	What is your communication plan? (training, knowledge transfer etc.)
		Our approach to ensuring customer satisfaction and open communication involves multiple checkpoints with the City including:		

	We would be happy to provide additional detail for any of the clients listed in Table 2 at the City's request.	in Table 3 at the City's request.		<ul style="list-style-type: none"> • Monthly Project Status Reports • Deliverable Expectations Documents (DED's) • Deliverable Acceptance Forms (DAF's) • Frequent check-ins with Project Manager and Project Principal • Phone and email availability for ad-hoc discussions
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Capability to Meet Time and Budget Requirements – 45 points				
Has your firm worked in the remote model or onsite model to get the scope of services completed?	Do you have the proximity or familiarity with the City's needs?	For your most recent last 3 projects with similar nature, what was the planned vs actual time and budget?	Do you have a history of change orders?	
15 Our work plan features a combination of remote and onsite work. We have planned for six on-site trips. Please see Section 2.0 Technical Proposal for additional detail.	10 Yes, please see to Section 1.1 Our Understanding of the City's Project.	10 The three most recent projects detailed in Table 2 (Section 1.3) were fixed fee projects. Therefore, our proposed budget and actual budget are the same. We would only extend or adjust a project timeline with the client's understanding and approval, due to client	10 The majority of our projects are fixed fee engagements, therefore we do not increase the budget for our proposed scope of work. If a task or deliverable requires more effort than we anticipated, that additional effort will not be billed to the client. The only change orders we issue are in response to scope changes or	



		resource constraints or preferences.	additional tasks requested by the client.	
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Written Evaluation = 100

<p>Has your firm developed a methodology/approach/work plan for this kind of project in the past? Explain in detail</p>	<p>20</p>	<p>Yes. Please see Section 2.0 Technical Proposal for detail.</p> <p>The work plan depicted in Section 2.0 has been developed and continuously refined over the course of numerous similar projects over the past 10 years.</p>	<p>20</p> <p>BerryDunn uses the following strategies to mitigate risks to the budget and schedule of all its consulting engagements:</p> <ul style="list-style-type: none"> The development of a mutually agreed-upon Project Work Plan and Schedule at the beginning of the process, as part of the Project Management Documents, our first deliverable Proactive project management by experienced project managers Our project management approach is informed 	<p>What is your proposed approach for the City's project?</p>	<p>20</p>	<p>Please refer to Section 2.0 Technical Proposal.</p>	<p>What are your differentiating factors compared to the market?</p>	<p>20</p> <p>We have an experienced project team that is dedicated to serving local government clients.</p> <p>We use a structured and collaborative IT consulting methodology.</p> <p>We provide actionable recommendations.</p> <p>We are independent and objective.</p> <p>Please see Section 1.1 Our Understanding for the City's project for additional detail.</p>	<p>What is your team structure based on your proposed approach?</p>	<p>20</p> <p>Please refer to Section 1.3 Proposed Project Team for detail.</p>
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	<p>by PMI's Project Management Body of Knowledge (PMBOK) version 5.</p> <ul style="list-style-type: none"> • Bi-weekly status reports to identify, monitor, and provide recommendations for managing any project issues before they impact the schedule or budget • A structured deliverable review and approval process that incorporates client feedback to ensure a satisfactory final deliverable 			
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Oral Evaluation = 100

Pricing = 30%

The City will like to see a detailed level of pricing based on the scope of services outlined in the RFP.

The City is not looking for any change orders during the term of the contract, we encourage to list all of the details of the cost with no hidden fees.

This should be your best price for us to evaluate our needs.

Price Categories:

Technical Feasibility Study: \$62,200

Bids Evaluation: \$8,690

Knowledge Transfer: \$17,550

Documentations: \$43,840

Recommendations: \$13,500

Support: \$185,220

Expenses: N/A (Included)

Total Cost: \$331,00

Minimum Qualification

Project Requirements	
Question	Yes/No
Is your firm a sister concern of any ERP Product and/or ERP service Implementer?	No
Are you going to bid for the ERP Product/Implementation RFP?	No
Are you planning to have sub-contractors?	No
Have you completed the Response Form reference listing with details of the projects?	Yes
Do you have experience with IT cross-functional team (networking, hardware & application support) possessing experience in consulting and technology services for design development, software integration and successful implementation of a custom ERP in the Government sector?	Yes
Will your firm require the City to provide laptops, cell phones and all applicable licenses?	No
Does your firm have successful Enterprise Solution Architecture experience?	Yes
Are you at par with the latest IT industry standards/best practices?	Yes
Does your firm have experience in RFP evaluations and contract negotiations?	Yes



Is your firm aligned to the success of the City's ERP project initiative?	Yes
Does your firm have the experienced and qualified professional as per the RFP requirements? (IT Enterprise Solution Architect, IT technical experts)	Yes
Will your firm adhere to the onsite presence requirement?	Yes

1.0 Qualifications

1.1 Our Understanding of the City's Project

The City is seeking the services of a qualified consultant to assist in becoming the “New American City” through a strong technological baseline. The selected consultant will deliver strategic recommendations for establishing a technology framework to support the City’s vision for the next 20 – 30 years, and will provide IT consulting services during the full life cycle of the ERP system starting from discovery through implementation. The City is seeking assistance in this endeavor through the following tasks:

- Conduct a technical feasibility study, which involves an assessment of the “as-is” IT Infrastructure and the IT Architecture readiness
- Provide a business process assessment, develop business process improvement maps, and report system performance criteria
- Assist with bid evaluation for short-listed ERP products/solutions and service implementers
- Lead project oversight to guide the implementation and keep the project on track to meet the City’s schedule

Our team will work closely with members of the City’s Project Team, which includes City officials, Gainesville Regional Utilities (GRU), General Government employees, and additional department stakeholders to assess the City’s IT processes, practices, and capacity. Through an approach that emphasizes collaboration and open communication, we will work with the City to develop an IT Assessment Report that encompasses the needs of all departments; evaluates the current and future capacity to meet the demand; and aligns IT services with the City’s goal to build a modern, strategic, and comprehensive technology design.

The IT Assessment Report will also incorporate strategies to secure data and reduce the risk of cyber-attacks, adopt a “One Stop Shop” solution, enable data sharing, and align Business Strategy with IT Strategy considering Digital Innovation. The IT Assessment Report and Business Process Improvement Maps resulting from this engagement will provide the City with improvement and best practice recommendations to support the modernization effort.

Furthermore, our team will bring our independence and objectivity to the analysis of proposing vendors to ensure the selected ERP product and service implementer best meet the City’s needs. Similarly, our proposed project oversight services will assist the City in establishing a realistic project schedule, and following that schedule to overcome project challenges, and identify, monitor and mitigate project risks.

When undertaking a project of this scope and importance, City leaders must have every confidence that they have selected a consultant and firm that is fully familiar with the ERP vendor community, the implementers that support the vendor implementations, and maintains independence from sellers of specific products. Likewise, the selected consultant must be able to understand where the City is today, assist in envisioning where it would like to be, and help chart the smoothest course to get there. BerryDunn’s track record of successful engagements

assisting municipalities with IT Assessments, system selection efforts, and implementation of ERP systems establishes us as an effective and valuable partner for the City. BerryDunn offers an efficient, repeatable, and proven technology planning methodology, which is designed to guide the City toward the achievement of its future IT and business goals.

The key strengths of our proposal that we consider to be most pertinent to the City's needs for this project are:

- ❖ **We have an experienced project team that is dedicated to serving local government clients.** Our team is comprised of experienced consultants that are dedicated to serving similar clients and maintain a national perspective on municipal, county, and state government best practices, including the systems used to support the delivery of services to constituents. Our team offers the right mix of project management, business, and technical expertise to meet the City's objectives as set forth in the RFP.
- ❖ **We use a structured and collaborative IT consulting methodology.** BerryDunn has developed a structured and collaborative approach to conducting IT consulting engagements. Central to our approach is involving City stakeholders from the beginning of the project to gain an understanding of strengths, challenges, and opportunities in the City's current environment. We have found that engaging a broad range of City personnel in the planning process results in greater buy-in and support for the recommendations.
- ❖ **We provide actionable recommendations.** We are aware that government agencies must balance time and budget constraints, staffing resources, competing projects, and differing perspectives on project priorities. As such, in developing recommendations and an IT Assessment for the City, we will consider Architectural Standards, IT Infrastructure and Readiness, Disaster Recovery, Data Backup and Recovery, Business Continuity, Best Practices, and Emergency Operations so that the City will have a clear and structured plan for its future decision-making as it relates to technology and other IT resources.
- ❖ **We are independent and objective.** BerryDunn is an independent consulting firm. We do not sell hardware or develop software, nor do we partner with vendors that could impair our objectivity. We will provide recommendations that are in the best interest of the City.

1.2 Firm Overview

BerryDunn is a consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We were formed in 1974 with nine professionals and have experienced sustained growth throughout our 43-year history. Today, BerryDunn employs approximately 340 personnel, with office locations in Arizona, Maine, New Hampshire, Connecticut, and West Virginia, as well as a satellite office in Massachusetts. We provide a full range of services, including IT consulting; management consulting; and audit, accounting, and tax services.



For the last seven years, BerryDunn has achieved the INSIDE Public Accounting (IPA) “Top 100 Firm” designation. BerryDunn was also named the “Best CPA Firm for Women” by the American Society of Women Accountants (ASWA) and the American Woman’s Society of Certified Public Accountants (AWSCPA).



These commendations, combined with our continued growth, speak to the **valued services and expertise we bring to our clients**, as well as the quality and integrity of our firm culture.

BerryDunn’s Government Consulting Group has been providing management and information technology consulting services to clients in local government and public sector agencies since 1986. We maintain a national presence, and have worked with more than 300 local, state, and quasi-governmental agencies throughout the country.

Dedication to Serving Government Agencies

Our dedicated Local Government Consulting Practice Area is committed to supporting public sector operations, as well as the systems and business processes that are required to provide necessary services to their internal departments and the constituents they serve. We participate in several industry groups and associations, including:



Our participation in these groups helps us to stay abreast of current topics and issues affecting our clients, contributing to our expertise.

BerryDunn is an independent consulting firm. We do not develop or sell software, nor do we partner with system vendors that could impair our objectivity. This allows us to provide objective services and recommendations that are in the best interest of the City.

BerryDunn's 2016 client survey revealed that 97% of our clients are satisfied with their most recent experience working with our team. Many cited our knowledge, expertise, timeliness, and responsiveness as key reasons for their satisfaction. In addition, during the past four years, approximately 75% of our local government clients have engaged us for additional work following the completion of their first project with us.

Professional Certifications

The following are some of the certifications held by members of BerryDunn's Government Consulting Group:

- **24 certified Project Management Professionals (PMP)**
- **24 Prosci® Certified Change Management Practitioners**
- **13 ITIL Foundation Certified**
- **9 certified Lean Six Sigma Green Belts**
- **9 Certified Information Systems Auditors (CISA)**
- **6 Certified Associates in Project Management (CAPM)**
- **5 Certified Fraud Examiners (CFE)**
- **4 Certified Information System Security Professionals (CISSP)**

Financial Stability (Confidential)

As a privately held certified public accounting and consulting firm, BerryDunn is not required to prepare audited or un-audited financial statements. However, the financial information and exhibits provided in this section exemplify the strong financial condition of our firm. BerryDunn has sustained steady growth during our 43-year history.

Should additional information be required regarding BerryDunn's financial stability, we would be pleased to provide additional information at the request of the City. Additionally, for more information on BerryDunn's financial stability, you may contact William Schad, Vice President, Commercial Lending at TD Bank in Portland, Maine, at 207-761-8612 or by email at william.schad@tdbanknorth.com.

Exhibit A (below) presents BerryDunn's revenue for the previous 10 fiscal years. Exhibit B (on the following page) provides BerryDunn's condensed financial information for the previous three fiscal years. To further demonstrate our financial stability, we have provided a letter from BerryDunn's primary financial institution demonstrating our good standing.

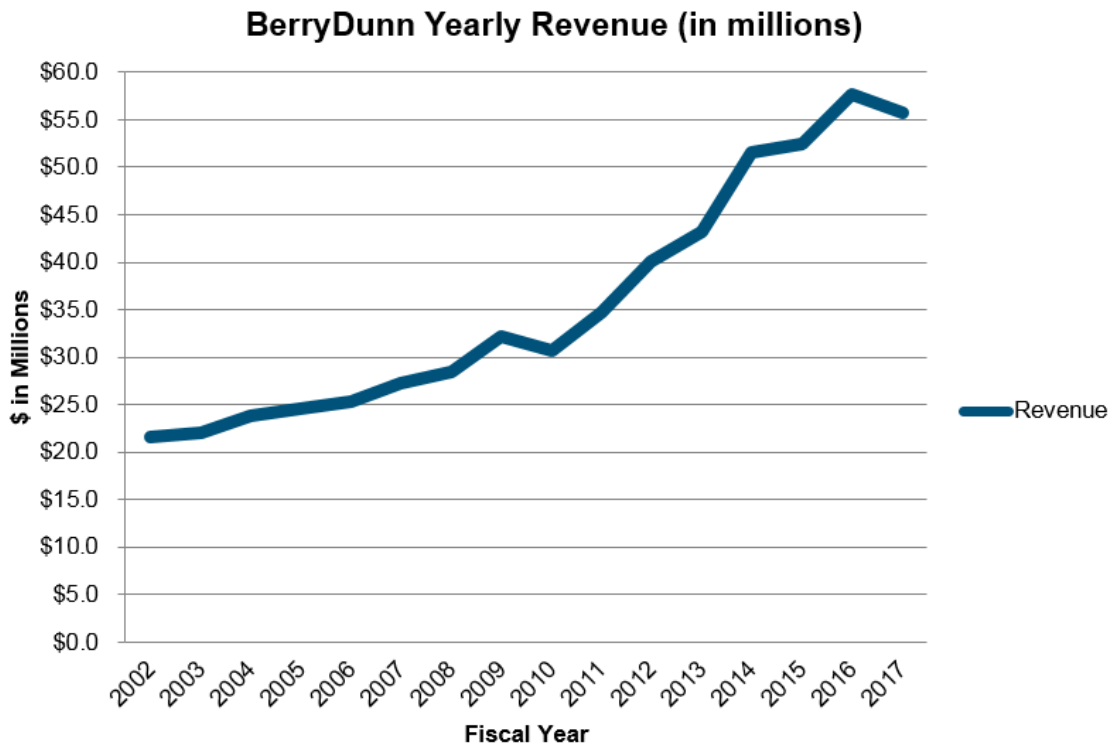


Exhibit A: BerryDunn Yearly Revenue (in millions)

**Berry Dunn McNeil & Parker
Condensed Financial Information
For the Years Ended June 30**

	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>
Current Assets	\$ 15,677,588	\$ 16,018,242	\$ 14,063,140
Fixed Assets, Net	1,473,153	2,232,806	2,255,209
	<u>\$ 17,150,741</u>	<u>\$ 18,251,048</u>	<u>\$ 16,318,349</u>
Current Liabilities	4,343,472	4,397,332	5,675,684
Amounts due Principals & Principals' Equity	12,807,268	13,853,716	10,642,665
	<u>\$ 17,150,740</u>	<u>\$ 18,251,048</u>	<u>\$ 16,318,349</u>
Operating Revenue	52,403,929	57,664,659	55,801,216
Operating Expenses	(42,236,224)	(46,425,993)	(49,092,487)
Depreciation & Amortization	(410,515)	(591,088)	680,860
Interest Expense	18,906	6,040	(10,694)
Net Income	<u>\$ 9,776,096</u>	<u>\$ 10,653,618</u>	<u>\$ 7,378,895</u>

Operating expenses include all amounts paid out to Principals as compensation, accordingly there is no net income reflected.

The above information is confidential and proprietary to Berry Dunn McNeil & Parker, LLC. Any inquiries on it or requests for additional information should be direct to John M. Chandler, Managing Partner at (207) 775-2387 ext. 2211.

Exhibit B: Condensed Financial Information



TD Bank
America's Most Convenient Bank®
One Portland Square
P. O. Box 9540
Portland, ME 04112-9540
T 207 761 8600
F 207 761 8660

tdbank.com

July 13, 2016

RE: Berry, Dunn, McNeil & Parker, Inc.
100 Middle Street
Portland, Maine 04101

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, Inc. has been a valued customer of TD Bank, N.A. since 1991, always maintaining a satisfactory loan and deposit relationship with the Bank. Over the past twenty four (24) years they have consistently demonstrated the financial capacity and credit worthiness to successfully provide accounting, tax, and business consulting services throughout the Northern New England area.

Berry Dunn is a well-regarded customer of the Bank and they have handled their affairs with the utmost integrity.

Please feel free to call me should you have any questions

Sincerely,



William R. Schad
Regional Vice President

1.3 Our Experience

IT Strategic Planning Expertise

Table 1 presents our depth of experience with the typical key assessment areas for IT assessments and planning.

Table 1: Experience with Key Governmental IT Planning Assessment Areas

	Assessment Area	Tactics and Considerations	
Administration	Service Delivery	<ul style="list-style-type: none"> • Project Management • Helpdesk/Troubleshooting • Email and Messaging • Document Management 	<ul style="list-style-type: none"> • Software/Hardware Deployment • Vendor Management • Cost Allocation
	IT Strategy	<ul style="list-style-type: none"> • Current Projects and Initiatives • Project Prioritizations • Procurement Strategy • Technology Governance 	<ul style="list-style-type: none"> • Budgeting • Business Case Development • Infrastructure
	Policy	<ul style="list-style-type: none"> • User Policies and Procedures • IT Policies and Procedures • IT Security Planning 	<ul style="list-style-type: none"> • Business Continuity/Disaster Recovery (BC/DR) Planning
Operations	Leadership	<ul style="list-style-type: none"> • Technical Leadership Role • Business Leadership Role • Organizational Structure 	<ul style="list-style-type: none"> • Succession Planning • Staff Compensation
	Support	<ul style="list-style-type: none"> • Staff Competencies • Staff Training • Job Descriptions • Performance Evaluations/Management 	<ul style="list-style-type: none"> • Recruiting Practices • Steering Committee Role • External Service Providers • Service Level Agreements
	Performance	<ul style="list-style-type: none"> • Responsiveness • Effectiveness 	<ul style="list-style-type: none"> • Communication • Performance Measurements
Technology	Internet	<ul style="list-style-type: none"> • Remote Access • Web Strategy <ul style="list-style-type: none"> ○ Content Management ○ Reporting/Analytics ○ Web Site 	<ul style="list-style-type: none"> ○ Social Media ○ Open Data ○ Citizen Self Service ○ Security • Cloud Computing
	Data	<ul style="list-style-type: none"> • Ownership • Integrity • Security 	<ul style="list-style-type: none"> • Warehousing • Backup

Network (LAN/WAN)	<ul style="list-style-type: none"> • Servers/Storage • Network Operating System • Licensing 	<ul style="list-style-type: none"> • Cabling • Telecomm
Applications	<ul style="list-style-type: none"> • Enterprise Applications <ul style="list-style-type: none"> ○ GIS ○ SCADA ○ Enterprise Resource Planning (ERP) • Line of Business Applications • Application Security 	<ul style="list-style-type: none"> • Reporting/Analytics • Integration • Databases • Deployment <ul style="list-style-type: none"> ○ Vendor-hosted • Software as a Service (SaaS)
End-User Computing	<ul style="list-style-type: none"> • Workstation Strategy • Printers • Audio/Video • Office Automation 	<ul style="list-style-type: none"> • Operating System • Refresh • Mobile Device Strategy • BYOD vs. Client-Owned

Table 2 contains a representative list of the three most recent government clients for which we have provided services similar to those the City is seeking.

Table 2: Three Most Recent Relevant BerryDunn Client Engagements

Project Name	Technology Staffing Analysis and Restructuring
Client Name	Loudoun County, Virginia
Timeline	November 2016 - January 2017
Cost	\$89,900
# of Resources	4 part time resources
Project Name	IT Staffing Assessment and Realignment
Client Name	City of Cambridge, Massachusetts
Timeline	November 2013 - July 2014
Cost	\$120,000
# of Resources	5 part time resources
Project Name	IT Strategic Plan
Client Name	Town of Farragut, Tennessee
Timeline	January 2016 – June 2016
Cost	\$50,000

of Resources

4 part time resources

Table 3 contains a representative list of the government clients for which we have provided services similar to those the City is seeking.

Table 3: Relevant BerryDunn Client Engagements

Client	Estimated Population	Project Description
Westchester County, New York	956,000	Strategic Technology Planning
Mobile County, Alabama	415,000	IT Strategic Plan for Health Department
Dakota County, Minnesota	410,000	IT Strategic Plan for Community Services Division
Somerset County, New Jersey	334,000	IT Strategic Plan for Parks Commission
Springfield Water and Sewer Commission, Massachusetts	250,000	IT Department Evaluation
Saginaw County, Michigan	193,000	Mainframe Applications Assessment and Replacement Study
City of Jackson, Mississippi	176,000	Strategic Technology Planning
Carroll County, Maryland	168,000	Strategic Technology Planning
Scott County, Iowa	167,000	IT Assessment and IT Strategic Planning
Kent County, Delaware	165,000	Strategic Technology Planning
City of Bloomington, Minnesota	86,000	Strategic Technology Planning
Glynn County, Georgia	80,000	IT Department Opportunities and Risk Assessment
City of Loveland, Colorado	68,000	Strategic Technology Planning
Town of Greenwich, Connecticut	61,000	Strategic Technology Planning
City of Alpharetta, Georgia	59,000	Strategic Technology Planning
City of Port Orange, Florida	57,000	Strategic Technology Planning
City of Santee, California	53,000	Strategic IT Master Plan
City of South Jordan, Utah	51,000	Strategic Technology Planning
City of Harrisonburg, Virginia	50,000	Strategic Technology Planning
City of Concord, New Hampshire	43,000	IT and Business Master Plan
City of Winchester, Virginia	27,000	Strategic Technology Planning
City of Louisville, Colorado	19,000	Strategic Technology Planning

Client	Estimated Population	Project Description
City of La Vista, Nebraska	16,000	Strategic Technology Planning
Town of Wayland, Massachusetts	13,000	Strategic Technology Planning
Town of Weston and Public Schools, Massachusetts	11,000	IT Assessment
Arlington Public Schools, Virginia	25,000 students	Information Services Review
Spokane Public Schools, Washington	29,000 students	IT Assessment
Blue Valley Public School District, Kansas	22,000 students	IT Assessment
Falls Church Public Schools, Virginia	166,000	Network Assessment
New Hampshire Department of Administrative Services	1,321,000	Statewide Strategic Technology Planning
New Hampshire Department of Resources and Economic Development	1,321,000	Statewide Strategic Telecommunications Planning

Our Experience in the State of Florida

The City will benefit from BerryDunn's demonstrated commitment to serving public sector clients in the State. We have developed a strong understanding of the public sector landscape in the State through recent or ongoing IT consulting engagements with the clients listed in Table 4.

Table 4: Our Florida Experience

Project Name	ERP System Selection Consulting
Client Name	City of Boca Raton, FL
Timeline	May 2015 - Present
Cost	\$195,000
# of Resources	6 part time resources
Project Name	ERP Software Consulting
Client Name	City of Coral Springs, FL
Timeline	August 2016 - Present
Cost	\$233,000
# of Resources	4 part time resources
Project Name	Workflow Process Review for Development Services

Client Name	City of Homestead, FL
Timeline	December 2015 - September 2017
Cost	\$79,000
# of Resources	6 part time resources
Project Name	Project Management Services for ERP Implementation
Client Name	City of Ormond Beach, FL
Timeline	September 2016 - Present
Cost	\$282,000
# of Resources	9 part time resources
Project Name	Strategic Technology Planning
Client Name	City of Port Orange, FL
Timeline	August 2003 – February 2004
Cost	\$49,450
# of Resources	4 part time resources

Systems Experience

BerryDunn’s team has knowledge of and firsthand experience with all of the major Tier 1 and Tier 2 ERP systems. Table 5 describes BerryDunn’s experience with Tier 1 and Tier 2 ERP software vendors, including those that BerryDunn reviewed as part of systems planning engagements and those that a client selected for implementation. Our experience assessing a wide variety of ERP vendors means that we understand the capabilities and limitations of today’s systems.

Table 5: BerryDunn’s Experience with ERP Vendors

Vendor	Description of BerryDunn’s Experience
ADP	BerryDunn worked with the Town of Greenwich, Connecticut, as the Town implemented ADP as a replacement for Tyler Technologies Munis. In addition, BerryDunn reviewed ADP as part of a system selection project with the Village of Oak Park, Illinois.
Bright and Associates (BAI)	BerryDunn has reviewed BAI as part of several systems planning projects for clients in the public sector, including: the City of Fredericksburg, Virginia; Goochland County, Virginia; and New Kent County, Virginia.
BS&A	BerryDunn has reviewed BS&A as part of several systems planning projects. Our projects with the City of Prior Lake, Minnesota, and the Three Rivers Park District, Minnesota, have included software implementation project oversight.

Vendor	Description of BerryDunn's Experience
CGI, Inc.	BerryDunn has reviewed CGI, Inc. as part of several systems planning projects for clients in the public sector. Our project for the City of Midland, Texas, focused on the City's use of CGI software.
J.D. Edwards (An Oracle Product)	BerryDunn has evaluated J.D. Edwards as part of several systems planning projects with public sector clients. We also provided ERP replacement consulting services to Sussex County, Delaware, which was originally a J.D. Edwards client, in addition to Washtenaw County, Michigan; the City of Santa Fe, New Mexico, and the City of Independence, Missouri. Our project with the City of Fort Collins, Colorado, focused specifically on business process review related to the City's use of the EnterpriseOne solution.
Harris Computer (Advanced Utilities, inHance, Cogsdale, Innoprise, GEMS)	BerryDunn has evaluated Harris software products such as Advanced Utilities, inHance, Cogsdale, Innoprise, and GEMS as part of several systems planning projects, including work with: the City of Irving, Texas; the City of Santa Fe, New Mexico; and the City of Richland, Washington. In addition, we have helped clients to select complementary systems to interface with Harris products such as Advanced Utilities.
Infor (Lawson and Infinum)	BerryDunn provided independent quality assurance oversight of the State of New Hampshire's Lawson ERP system implementation. We have also evaluated Lawson as part of our ERP system selection consulting work for the City of Sioux Falls, South Dakota, and Scott County, Iowa. Our software system needs assessment work with the Montgomery County Public Schools, in Maryland, focuses on the use of Lawson, as does the assessment work with Scott County, Minnesota. Our work with the Cities of Santa Fe, New Mexico, and Boca Raton, Florida, as well as Washington County, Minnesota, included assessment of the Infor Infinium solution as part of the system replacement scope.
Kronos (TeleStaff and Workforce Central)	BerryDunn has reviewed Kronos products as part of several systems planning projects for clients in the public sector. Most recently, BerryDunn has been providing project management services to the City of Santa Fe, New Mexico, as it implements both TeleStaff and Workforce Central.
Microsoft Dynamics (formerly Great Plains)	BerryDunn has reviewed Microsoft Dynamics as part of several systems planning projects for clients in the public sector. Tampa Port Authority selected Microsoft Dynamics for its ERP system.
Oracle's E-Business Suite/Fusion Cloud	BerryDunn has reviewed Oracle as part of several systems planning projects for clients in the public and private sectors. A systems planning project led by BerryDunn for a New England manufacturing firm resulted in the selection of Oracle. BerryDunn's system selection project for Arlington County Public Schools also resulted in the selection of Oracle. Our work with the Montgomery County Public Schools in Maryland consists of an upgrade assessment of Oracle for financial modules. In addition, we have helped clients to select complementary systems to interface with Oracle's E-Business Suite.

Vendor	Description of BerryDunn's Experience
Pentamation	BerryDunn worked with the City of Fairfax, Virginia to identify opportunities for improving business processes in conjunction with the City's planned upgrade of Pentamation. As part of the project, BerryDunn team members received training on the software and gained significant understanding of its features and functionalities.
Performance, formerly KPMG (Harris)	BerryDunn has reviewed Harris products as part of several systems planning projects for clients in the public sector, including our work for Sussex County, Delaware. Most recently, BerryDunn provided ERP consulting services to the City of Mesquite, Texas, relating to the replacement of its Performance system.
PeopleSoft (An Oracle Product)	BerryDunn has reviewed PeopleSoft as part of several systems planning projects, including work with the State of Vermont, which resulted in the selection of PeopleSoft. We also provided Independent Verification and Validation (IV&V) of Massachusetts's PeopleSoft Human Resources system upgrade and are currently working with the City of Glendale, Arizona as it considers alternatives to replace its PeopleSoft software (HCM and SCM).
Sage	BerryDunn evaluated Sage as part of systems planning work with the Tampa Port Authority, as well as other projects.
SAP	BerryDunn conducted a project for the City of Toledo, Ohio, which involved evaluating the City's current environment, developing requirements, and providing recommendations related to the upgrade of its existing SAP software or replacement with another commercial system. The City chose to upgrade its existing software.
Superion (previously SunGard Public Sector)	BerryDunn has worked with several clients, including the City of Sioux Falls, South Dakota, during the planning and implementation phases of replacing their Superion systems. In this engagement, BerryDunn was hired to assist City staff in selecting a financial management system to replace its 17-year-old Superion system. We have since been hired to provide project oversight during the City's implementation of its replacement ERP system. We are also working with the cities of College Station and Pearland, Texas; West Jordan, Utah; Bloomington, Minnesota; and Manassas, Virginia (all Superion clients), to provide ERP needs assessment and replacement planning services. We have additional experience with Superion's IFAS and OneSolution products.
Tyler Technologies (Munis, New World, Eden, Incode products)	BerryDunn evaluated Tyler's software products such as Munis, New World, Incode, and Eden as part of several systems planning projects, including work with Sioux Falls, South Dakota; Newport News, Virginia; the Cities of Pearland and Mesquite, Texas. We also served as the project manager for the City of Mesquite throughout the implementation of Munis. We are currently providing implementation oversight during the City of Pearland's New World implementation.

Vendor	Description of BerryDunn's Experience
	We have also evaluated Tyler's Incode software as part of a Financial system selection project for the City of La Vista, Nebraska, and are currently providing project management services for Minnehaha County, South Dakota, as the County implements Incode for tax collections.

1.4 Proposed Project Team

Our Project Team is comprised of expert consultants who are dedicated to serving local government clients and maintain a national perspective on municipal government best practices, including the systems used to support the delivery of services to constituents. Many consultants in our Local Government Practice Area also bring valuable knowledge from their experience prior to BerryDunn; our proposed team includes a former IT director and a former police officer. Approximately 75% of our Local Government Practice Area has worked in the public sector. They offer the right mix of project management, business, and technical expertise to meet the City's objectives as set forth in the RFP.

Our proposed team, outlined in Exhibit C and introduced in Table 6, offers direct experience in business process evaluation, planning, procurement, and implementation.

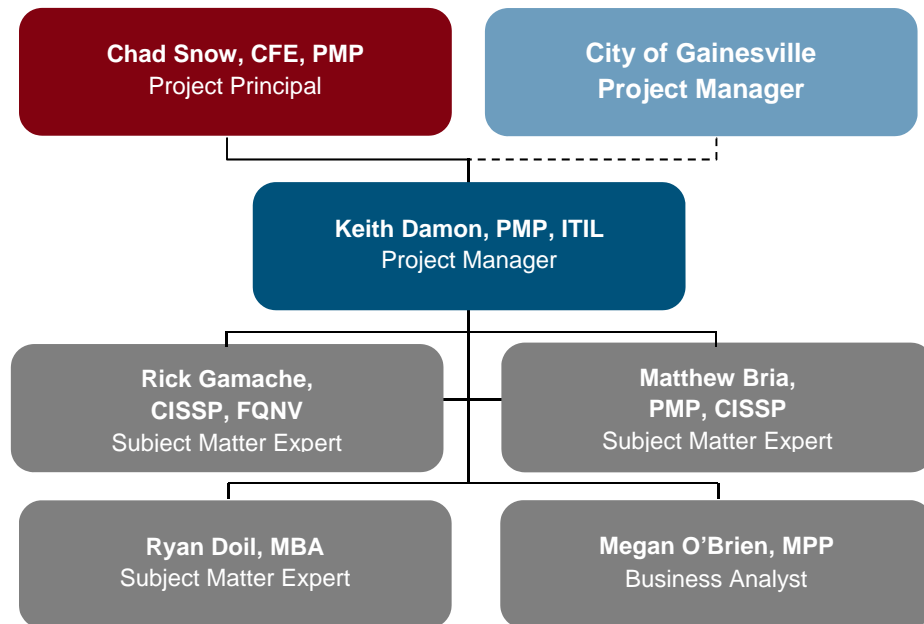


Exhibit C: Team Organization

Table 6: Project Roles

Name/Title	Project Role and Background
Chad Snow, PMP, CFE Principal	<p>As project principal, Chad will ensure our firm's full commitment to this engagement and have overall responsibility for the quality of services and deliverables provided to the City, including the approval of all deliverables. With the project manager, he will oversee the quality and timeliness of all deliverables.</p> <p>Chad has led more than 20 BerryDunn IT assessment and strategic technology planning projects for towns, cities, and counties across the country.</p>
Keith Damon, PMP, ITIL Project Manager	<p>Keith is an experienced project manager with over 12 years of experience working with public sector agencies to manage enterprise applications. As a project manager for the public sector group within J.D. Edwards, he worked exclusively with government customers. Complementing this experience, Keith has 17 years' experience working in municipal government as an IT director. He has significant experience in managing projects similar to the one planned by the City for clients including the Cities of Boca Raton, FL; Allen, Texas; and Mesquite, Texas.</p>
Megan O'Brien, MPP Business Analyst	<p>Megan is a consultant in BerryDunn's Government Consulting Group. As a business analyst, she will support the project manager in the facilitation of on-site meetings, the preparation of status reports, and ensuring the timely completion of all project deliverables.</p>
Rick Gamache, CISSP, FQNV Subject Matter Expert	<p>Rick will serve as the security and technical subject matter expert for this engagement with the City. He has an extensive background in information systems security as well as cyber threat experience. He has extensive project management experience with international clientele and a proven ability to lead and deliver complex projects. Rick also has strategic business sense and a widely diverse background in compliance, governance, human resources, operations, business continuity, and information risk management.</p>
Ryan Doil, MBA Subject Matter Expert	<p>Ryan brings more than five years of experience in a federal procurement role and has managed projects similar in scope and size to the services requested by the City for a number of BerryDunn clients, including ongoing engagement with the Cities of Independence, Missouri; Santa Fe, New Mexico; Shoreline, Washington; and Novato, California to select replacement ERP systems. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects, such as the one planned by the City.</p>
Matthew Bria, PMP, CISSP Subject Matter Expert	<p>Matthew will serve the role of Subject Matter Expert on this project. He has firsthand experience building and managing security processes that enable organizations to meet their business objectives while ensuring security needs are incorporated into business processes. Matthew will also bring his experience and working knowledge of network architectures and best practices to support the project.</p>

Name/Title	Project Role and Background
Additional BerryDunn Resources	BerryDunn's team will also include consultant(s) and/or senior consultant(s) from BerryDunn's Government Consulting Group, which is made up of 100 personnel. As business analysts, these resources will support the Project Team with efforts relating to fact-finding, research, and deliverable development.

Resumes of Proposed Team Members

On the following pages, we have provided detailed resumes for our proposed project team members that provide a summary of their most relevant experience, as well as their roles in key prior and ongoing public sector projects.

CHAD SNOW ♦ PRINCIPAL ♦ PMP, CFE

Chad has more than 27 years of experience working with local government agencies and has extensive experience assisting government clients with project management, technology planning, business process improvement, system implementation and design, and enterprise systems. Prior to joining BerryDunn in 2006, Chad worked for an ERP system vendor, where he provided in-depth demonstrations on ERP, revenue, and public safety applications to prospective government clients in addition to providing project management and implementation support. He also served as a police officer in Maine for 10 years.

Qualifications and Experience

- ✓ **IT Assessments and Strategic Planning:** Chad has led IT assessment and strategic planning efforts for many of BerryDunn's local government clients, including the cities of Bloomington, Minnesota; Louisville, Colorado; Santee, California; and Cambridge, Massachusetts; as well as Loudoun County, Virginia. As a result, he is skilled in eliciting valuable feedback and information from stakeholders; identifying gaps in IT assets, process, staffing, or governance; and aligning them with actionable initiatives that support the organization's goals.
- ✓ **Enterprise Systems Planning:** Chad is experienced in the full life cycle of planning for and procuring new enterprise systems, having assisted cities, counties, and school districts across the country with their software replacement initiatives. He has managed every step of the process, from assessing the current environment to conducting needs assessments, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various ERP systems available in the market, as well as best practices in ERP business processes, and brings this insight to every engagement.

**Education**

- ❖ BA, Criminology, University of Southern Maine
- ❖ AS, Law Enforcement Technology, Southern Maine Technical College

Certifications

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Certified Fraud Examiner (CFE), Association of Certified Fraud Examiners

Professional Affiliations

- ❖ Associate Member, Government Finance Officers Association (GFOA)
- ❖ Associate Member, International City/County Managers Association (ICMA)

Prior Organizational Experience

ERP Software Vendor: Chad worked for a vendor of government ERP, revenue, and public safety applications for six years. In this role, he provided in-depth demonstrations to more than 40 municipal, county, and state agencies, as well as conducted gap-fit analyses and developed business process recommendations to meet the needs of his ERP implementation clients.

Police Officer: Chad was a police officer for a city in Maine for 10 years, focusing in accident reconstruction, field training, and investigations, as well as serving as a school resource officer.

Chad's Key Clients

The following list is a representative sample of BerryDunn clients Chad has assisted with IT and management consulting engagements.

- City of Bloomington, Minnesota
- City of Boca Raton, Florida
- City of Boulder, Colorado
- City of College Station, Texas
- City of Glendale, Arizona
- City of Philadelphia, Pennsylvania
- City of Santa Fe, New Mexico
- City of Sioux Falls, South Dakota
- Loudoun County, Virginia
- Round Rock Independent School District, Texas
- Scott County, Iowa
- Washtenaw County, Michigan

KEITH DAMON ♦ MANAGER ♦ PMP, ITIL

Keith is an experienced project manager with more than 17 years of experience working with public sector agencies to manage enterprise applications. As a project manager for the public sector group within J.D. Edwards, he worked exclusively with government customers. Complimenting this experience, Keith has 17 years' experience working in municipal government as an information technology (IT) director. He has significant management experience within large and diverse government organizations, uniquely qualifying him to assist BerryDunn's government clients.

Qualifications and Experience

- ✓ **Project Management of IT Assessments:** Keith has provided project management for many of BerryDunn's IT assessment or strategic planning projects, including engagements with Loudoun County, Virginia; Blue Valley Schools in Kansas; and the Town of Farragut, Tennessee. All of these projects have involved fact-finding, analysis, and prioritization of issues related to IT infrastructure, systems, processes, procedures, staffing, training, financial resources, or service delivery.
- ✓ **Public Sector IT Management:** Keith brings a wealth of knowledge in the management of municipal IT operations from his prior role as IT director for the City of Keene, New Hampshire. He was responsible for all aspects of the City's IT environment, including staffing, training, hardware, software, policy, support, and the selection, implementation, change management, and maintenance of all City systems.
- ✓ **Project Management:** Keith has extensive experience in managing, planning, and implementing ERP systems, both as a customer and as the vendor. This perspective and insight benefits our ERP consulting clients across the country. He has led many business process improvement activities and strategic planning sessions, and has assisted with organizational change management, which is a critical success factor for any large-scale implementation project.

**Education**

- ❖ BS, Computers and Management, Franklin Pierce College

Certifications

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Information Technology Infrastructure Library (ITIL) Foundation Certified
- ❖ Prosci®-Certified Change Management Practitioner

Prior Organizational Experience

Oracle/PeopleSoft/J.D. Edwards: Keith served as Oracle's engagement manager, with responsibility for overseeing more than 30 public sector implementation projects, working with regional sales managers to develop tools to address customer needs, and providing consulting assistance for customers and partners. He also managed PeopleSoft implementations for government clients, as well as J.D. Edwards upgrade initiatives, which involved performing upgrade planning sessions and preparing customers to migrate to the current version of the software.

City of Keene, New Hampshire: Keith served as director of IT for the City. In this role, he oversaw all aspects of IT for all City departments, including planning for the City's technology needs, and implementing and supporting all technology initiatives. During his tenure, Keith led the implementation of Pentamation's ERP software; developed standards for all hardware and software for the City; managed technical staff; ensured responsive support for all City computer users; managed conversion, implementation, and training for new systems; developed Request for Proposals (RFPs); and led vendor negotiations.

Keith's Key Clients

The following list is a representative sample of BerryDunn clients Keith has assisted with IT and management consulting engagements.

- Carroll County, Maryland
- City of Allen, Texas
- City of Boca Raton, Florida
- City of Cambridge, Massachusetts
- City of College Station, Texas
- City of Ormond Beach, Florida
- City of Loveland, Colorado
- City of Mesquite, Texas
- City of Coral Springs, Florida
- Loudoun County, Virginia
- Minnehaha County, South Dakota
- Town of Farragut, Tennessee

RICK GAMACHE ♦ SENIOR CONSULTANT ♦ CISSP ♦ FQNV

Rick is an accomplished leader and mentor with 14 years of direct information systems security and cyber-threat intelligence experience. He has proven skills in building relationships, gaining consensus, and project buy-in. As the cofounder of a successful cyber-threat intelligence company from start-up to \$4 million in annual sales in three years, he has managed all aspects of the fusion, production, and publication of actionable strategic and tactical threat intelligence reports for a network of global security teams.

Qualifications and Experience

- ✓ **Cyber Security:** As a former CIO and managing director, Rick has extensive leadership experience and is a highly skilled cyber-threat intelligence professional. He also has strategic business sense and a widely diverse background in compliance, governance, human resources, operations, business continuity, and information risk management. Rick is a veteran of the U.S. Coast Guard with an Honorable Discharge and currently holds a U.S. secret clearance eligible up to Top Secret.

Prior Organizational Experience

Wapack Labs and Red Sky Alliance: As the managing director and chief information officer (CIO), Rick led a global team of highly skilled cyber-threat intelligence professionals and malware analysts, producing high-quality, actionable threat intelligence, and analysis reporting. He drove the development and use of new proprietary and open source intelligence (OSINT), and human intelligence (HUMINT) sources; maintained situational awareness of emerging trends in threat actor tactics, techniques, and protocols (TTPs); planned, tracked, and audited the organization's compliance with Federal Financial Institutions Examination Council (FFIEC) and ISO-27001 standards; and assisted in incident response through malware analysis, research, and resource management.


Education

- ❖ BS, Organizational Leadership, Southern New Hampshire University

Certifications

- ❖ Certified Information Systems Security Professional (CISSP)
- ❖ Fully Qualified Navy Validator (FQNV)

Professional Affiliations

- ❖ Ad hoc Member, NIST Framework for Improving Critical Infrastructure, Carnegie Mellon University, Pittsburgh, PA
- ❖ 2014 and 2015, Presenter, FS-ISAC Spring Conference
- ❖ 2014 and 2015, Presenter, Nordic IT Security Conference, Stockholm, Sweden
- ❖ 2015, Presenter, iSMG Information Security Summit, Los Angeles, CA; Atlanta, GA; and Boston, MA

Alion Science and Technology: As the director of information assurance and IT for this world-leading defense contractor responsible for the design, change management, and budgeting of the U.S. Navy's DDG-51 and DDG-1000 destroyer programs, Rick was responsible for all Certification and Accreditation (C&A) activities. He led risk assessments and security audits for Defense Information Assurance Risk Management Framework (DIARMF) packages for the security assessment of classified and unclassified networked systems. Additionally, he developed system vulnerability testing protocols, scanning, and mitigation strategies to achieve compliance with set standards; successfully directed the integration of the Navy's change and financial management platform to the Department of Defense's secured operating environment in Mechanicsburg, PA (DISA). He also managed all Federal Information Security Management Act (FISMA) compliance activities for the successful validation of critically needed key legacy systems. In this role, he served as the lead validator for certifying classified Navy networks, resulting in the submission of an accreditation package with no material findings, greatly reducing the time required to obtain an Authority to Operate.

Rick's Key Clients

The following list is a representative sample of BerryDunn clients Rick has assisted with IT and management consulting engagements.

- Missouri Department of Social Services, MO HealthNet Division
- Metropolitan Government of Nashville
- Metropolitan Government of Nashville Police Department

RYAN DOIL ♦ SENIOR CONSULTANT ♦ MBA

Ryan brings five years of experience working in the public sector in facilities and procurement. Through this work, Ryan offers a valuable perspective on the effective oversight of complex, multi-organizational government information systems management, procurement processes and compliance, and organizational change.

Qualifications and Experience

- ✓ **Project Management:** Ryan has managed projects for a number of BerryDunn clients, including an ongoing engagement with the City of Irving, Texas, to select a replacement ERP system and a replacement water utility billing system. He also led a business process review project for the Fairfax-Falls Church Community Services Board in Virginia. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects.
- ✓ **ERP System Selection:** Ryan has extensive experience leading organizations through ERP system selection projects. In each, Ryan has worked with all stakeholder groups to confirm current environment challenges and business drivers for the project, document future system requirements, and lead the client through a collaborative and structured system evaluation process.
- ✓ **RFP Development:** Leveraging his public sector procurement experience, as well as his knowledge of project and software systems, Ryan is uniquely situated to facilitate the development and issuance of effective and thorough RFPs. Working jointly with client staff, Ryan has facilitated the development and issuance of more than 15 public sector RFPs this calendar year.

Public Sector Procurement: During his time with the United States District Court of Maine, Ryan served as the Court's facilities and procurement specialist. In addition, Ryan was the project manager for a BerryDunn engagement to conduct an in-depth review of the procurement processes at ecomaine, a quasi-municipal organization located in Portland, Maine. The focus of this project was to develop

**Education**

- ❖ MBA, University of Southern Maine
- ❖ BA, Political Science and History, University of Vermont

Certifications

- ❖ Prosci®-Certified Change Management Practitioner

recommendations for improvement in controls, processes, software systems, staffing, organization, and documentation, as they relate to the procurement process. He served as the lead in an engagement for the City of Fort Collins, Colorado, to review the City's procure-to-pay processes and develop an action plan to address bottlenecks and gain efficiencies both internal and external to the City's ERP system.

Prior Organizational Experience

United States District Court, District of Maine: For five years, Ryan held positions of increasing responsibility within the Maine District of the Federal Courts. During his time there, he served as the Courts' facilities and procurement specialist. One of his key responsibilities was to help ensure the efficiency and integrity of operations, which included reviewing and performing accounts payable and accounts receivable duties for the accuracy and accountability of monies received and disbursed by the Court. During this time, he worked hands-on with the Budget, General Ledger, Accounts Payable, Accounts Receivable, Purchasing, Inventory, and Vendor Management modules of the ERP solution used by the courts.

He also oversaw a number of key projects, including managing the conversion of the District of Maine to web-based payment software for the purposes of paying court-appointed defense counsel. This migration included a detailed vendor verification process, in-depth off-site training, training curriculum development, and staff training.

Ryan's Key Clients

The following list is a representative sample of BerryDunn clients Ryan has assisted with IT and management consulting engagements.

- Albemarle County, Virginia
- City of Boca Raton, Florida
- City of Cambridge, Massachusetts
- City of Fort Collins, Colorado
- City of Grants Pass, Oregon
- City of Independence, Missouri
- City of Richland, Washington
- City of Santa Fe, New Mexico
- City of Shoreline, Washington
- City of Tucson, Arizona
- ecomaine, Portland, Maine

- City of Irving, Texas
- City of La Vista, Nebraska
- City of Mesquite, Texas
- City of Novato, California
- City of Pearland, Texas
- Fairfax Community Services Board, Virginia
- Lake County, Illinois
- Minnehaha County, South Dakota
- Village of Oak Park, Illinois
- Washtenaw County, Michigan

MEGAN O'BRIEN ♦ CONSULTANT ♦ MPP

Megan is a consultant in BerryDunn's Government Consulting Group with experience as a business analyst serving local clients. She has worked in nearly every level of government: city, county, state, and federal. Her experience includes performance auditing, business process analysis and improvement, benchmarking research, and strategic goal setting.

Qualifications and Experience

- ✓ **Enterprise System Implementation:** Megan has assisted in conducting implementation assessments, such as go-live readiness assessments. Megan has also worked on quality assurance audits for system implementation projects. She is currently working on a quality assurance project for an ERP system implementation project with the City of Long Beach.
- ✓ **Business Process Analysis:** As an intern for the City of Phoenix and Department of Economic Security, Megan documented business processes in the form of Microsoft Visio diagrams and narrative descriptions. She has experience in facilitating fact-finding interviews and business process review sessions to develop shared understanding of current processes, as well as buy-in for future recommendations. Megan recently led business process diagram mapping sessions for the City of Fredericksburg and for Gallatin County as part of ERP system selection projects.

**Education**

- ❖ MPP, Arizona State University
- ❖ BA, Political Science, Bryn Mawr College

Prior Organizational Experience

Arizona Office of the Auditor General: In her role as a performance auditor, Megan wrote audit programs, analyzed data, interviewed agency staff, reviewed literature, interpreted policies and statutes, and synthesized audit information into well-documented work papers in compliance with government audit standards. She also formulated findings and appropriate recommendations based on audit evidence; summarized complex evidence, findings, and recommendations into concise reports; and communicated audit progress to the audited agency.

Maricopa County Air Quality department: As a management intern, Megan analyzed, researched, and made recommendations on policy issues, such as emission offsets required in the County due to nonattainment status in ozone.

U.S. Embassy: As a public diplomacy intern in Vientiane, Laos, Megan created and managed programs for Lao students. During her time at the U.S. Embassy, she wrote remarks and correspondence for the ambassador and drafted U.S. Embassy publications. She also managed a grants competition for Lao nonprofits to obtain U.S. funding.

City of Phoenix: As a public works solid waste intern, Megan lead a project to document business processes related to public works, which included facilitating meetings with staff and management, creating flowcharts and narratives, and presenting recommendations to management. She assisted management in creating goals for the solid waste section of the City General Plan by researching other cities and presenting recommendations to the solid waste leadership team.

Department of Economic Security: Megan, as an Office of Accountability intern, created work plans and deliverable templates for fraud; complaint management; strengths, weaknesses, opportunities, and threats (SWOT) analysis; and business process improvement projects within the department. She documented business processes in Microsoft Visio by conducting interviews; researching, analyzing, and summarizing data; and presenting findings and recommendations to management.

Arizona State House of Representatives: As a house page, Megan organized committees and caucuses, and assisted legislators on the House floor during legislative sessions.

Megan's Key Clients

The following list is a representative sample of BerryDunn clients Megan has assisted with IT and management consulting engagements.

- City of Boulder, Colorado
- City of Cedar Hill, Utah
- City of Chaska, Minnesota
- City of Fredericksburg, Virginia
- City of Glendale, Arizona
- City of Irving, Texas
- City of Long Beach, California
- City of Santa Fe, New Mexico
- City of South Jordan, Utah
- Gallatin County, Montana
- Pitkin County, Colorado
- Scott County, Minnesota
- Spokane Public Schools, Washington
- City of Coral Springs, Florida

MATTHEW BRIA ♦ SENIOR CONSULTANT ♦ PMP

Matthew is an experienced information security, technology leader and subject matter expert in information security and governance. He possesses a strong knowledge and understanding of security analytics, ERP security, network and cloud security, security architecture, security governance, risk assessments and compliance.

Qualifications & Experience

- ✓ **IT Security:** Matthew has served as the Director of IT Security for previous organizations, responsible for all aspects of enterprise wide security organization, and enterprise production change management for multi-billion dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security architecture, Identity and Access Management, IPS, Multi Factor Authentication, Advanced Malware detection, Security Analytics, Forensics, DLP, Incident Response and endpoint protection. In addition, he was responsible for the implementation of enterprise-wide security metrics, security policy, as well as the formation of an executive security steering committee.
- ✓ **ERP Implementation:** Matthew has experience in the procurement, design, and implementation of SAP role-based application security for a user base of 10,000. He has managed a large scale, cross-organizational SAP ECC 6.0 implementation and continued support packs, consisting of FI/CO, AR, AP, GL, MM and warehouse.

Prior Organizational Experience

TBC Corporation: As the Director of IT Security, Matthew served as the highest ranking security leader in the organization, reporting directly to CIO, responsible for all aspects of enterprise wide security organization, and enterprise production change management for multi-billion dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security architecture, Identity and Access Management, IPS, Multi Factor Authentication, Advanced Malware detection,



Education

- ❖ BS, Management Information Systems, Salve Regina University

Certifications

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Certified Information Systems Security Professional (CISSP)

Professional Affiliations

- ❖ The International Information System Security Certification Consortium (ISC)²

Security Analytics, Forensics, DLP, Incident Response and endpoint protection. In addition, he was responsible for the implementation of enterprise wide security metrics, security policy, as well as the formation of an executive security steering committee.

GTECH Corporation West Greenwich: As a Project Manager and Software Engineer, Matthew provided project management for complex multi-tiered implementations consisting of software development, marketing, new communications networks, and web based system architecture. He led all project meetings with SME/leads from each discipline: Software, Infrastructure, Finance, Product Development, Training and Marketing. Led cross-organizational efforts defining change management, Issue Tracking Systems, Operational procedures and training needs.

Additionally, Matthew developed stored procedures, triggers, scripts, performance tuning, and reports to enhance and support a complex multi-tiered system with SYBASE database for multiple Lottery project implementations. He also administered and configured Sybase SQL Server and Sybase Replication Server. Provided engineering support of Quality Assurance testing, functional requirement specifications, data dictionaries, white papers and project plans.

Matthew's Key Clients

The following list is a representative sample of BerryDunn clients Matthew has assisted with IT and management consulting engagements.

- Metropolitan Government of Nashville & Davidson County, Tennessee
- City of Long Beach, California
- Lewiston, ME Public Schools
- Washington State Auditor's Office
- West Virginia

2.0 Technical Proposal

Our Project Management Methodology

To help ensure that project objectives are met, and initiation and completion of project work are conducted in a timely manner, each BerryDunn project is led by an experienced project manager who understands project management best practices. Our Consulting Group employs project management best practices from PMI’s Project Management Body of Knowledge (PMBOK), Version 5. Our approach includes applying standard processes across the project management life cycle, as shown in Exhibit D.

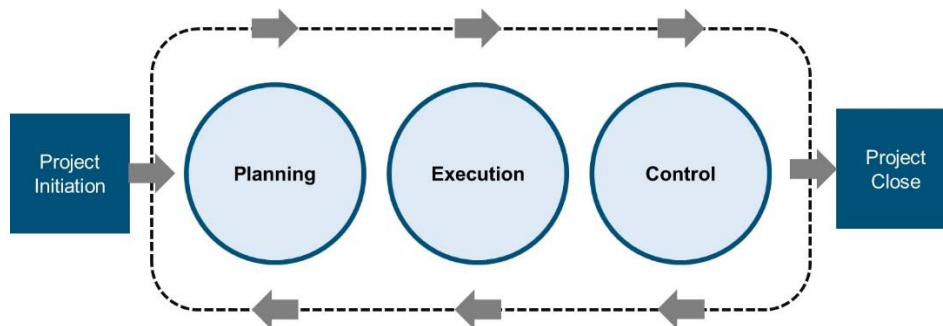


Exhibit D: Project Management Life Cycle

Detailed Work Plan

We have developed a detailed work plan, presented on the following pages, to align with the City’s Scope of Work set forth in its RFP.

Phase 1: Project Planning

1. **Conduct initial project planning.** BerryDunn will conduct an initial project planning teleconference with the City’s Project Team and any additional key stakeholders identified for inclusion by the City. The purpose of this meeting is to review our proposed Project Work Plan and Schedule, clarify goals and objectives, identify known project constraints, and refine dates and/or tasks as appropriate. We will also request names and contact information for City staff members who will be involved in the project, and work collectively to schedule the project kickoff meeting and initial interviews.
2. **Develop a Project Work Plan and Schedule.** Based on the information gathered from our initial project planning teleconference and documentation request, BerryDunn will develop the Project Work Plan and Schedule, which will address our approach for managing communications between BerryDunn and the City, as well as our approach to scope, risks, and resource management. The Project Work Plan and Schedule will also address BerryDunn’s approach to providing the exact services requested by the City and the agreed-upon timeframe for each task. In addition, the Project Work Plan will incorporate agreed-

upon procedures between BerryDunn and the City related to project control, including quality management and deliverable submission/acceptance management.

Deliverable: D1. Project Work Plan and Schedule

- 3. Request and review available documentation.** Prior to conducting our on-site work, we will submit an Information Request Sheet to the City to request available documentation that will be helpful to us during the project. The requested documents will be used to gain an understanding of the City's current technology environment prior to on-site assessment activities. Requested documents may include an inventory of City hardware, software, and applications; architectural network design documents, existing IT policies and procedures; and other relevant information.

We respectfully request that the City provide available documentation prior to the project kickoff and on-site assessment sessions, as reviewing this information in advance of our on-site work will enable us to be more efficient, become more knowledgeable of the current environment, and make best use of City personnel's time.

- 4. Develop and administer a web-based end-user survey.** BerryDunn will develop a web-based survey for project stakeholders to complete in advance of our on-site work. The survey will include an introduction explaining the project and a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis survey. Prior to administering the survey, we will review the content with the City's Project Team and make any recommended changes.

Each stakeholder will be asked to complete the SWOT Analysis form with respect to the City's services and environment. We have found that soliciting input via a web survey allows us to collect input from a broad sampling of City staff while allowing staff members to provide opinions at their convenience and with minimal disruption to day-to-day activities. Moreover, we will review survey responses prior to our on-site fact-finding efforts, which will allow our team to be better prepared for this visit and able to tailor our interview questions based on trends identified from the survey data.

Through our experience conducting similar engagements, we understand the importance of involving City stakeholders from many departments in a collaborative manner to facilitate understanding of City needs and to obtain support for recommendations. Our consultants will be focused on identifying opportunities to enhance support for future citywide technologies to achieve the objectives of the project and becoming the "New American City".

- 5. Administer, collect, and review survey responses.** Each stakeholder will be asked to complete the appropriate survey with respect to all areas of the City's technology and IT services. We have found that soliciting input via a web survey allows us to collect input from a broad sampling of City staff while allowing staff members to provide their opinions at their convenience, anonymously, and with minimal disruption to day-to-day activities. Moreover, we will review survey responses prior to our on-site fact-finding efforts, allowing our team to be better prepared for this on-site visit, and to tailor our interview questions based on trends identified in review of the survey response data.

Phase 2: Assessment Phase

5. **Facilitate Project Kickoff Meeting.** We will facilitate an on-site project kickoff meeting with the City's project manager, IT department staff, and additional stakeholders that will take part in our fact-finding activities throughout the assessment phase. During the kickoff we will work to communicate the importance of the project to support the ERP Implementation. We will seek input from senior city staff who can share the vision and describe the importance of this project. The high-level project phases and tasks will be reviewed, and the roles for project participants will be shared. Experience has shown that there is normally an excitement that is created for the project during the kickoff session. The BerryDunn team will also provide opportunity for questions and answers by those in attendance.
6. **Evaluate As-Is IT Infrastructure.** BerryDunn will lead on-site assessment sessions to evaluate the "as-is" IT Infrastructure. We will coordinate with the City project manager to identify technical staff and appropriate project stakeholders who should be included in sessions. The purpose of these sessions is to gain feedback from a larger group of vested stakeholders, to ascertain Strengths, Weaknesses, Opportunities, and Threats (SWOT) of the current environment from a business perspective.

In addition to stakeholder sessions, BerryDunn will conduct concurrent sessions with IT staff to review and evaluate the current IT infrastructure and readiness in preparations for the ERP implementation. Specific sessions will also be coordinated with those individuals who are responsible and in the line of authority with regard to Disaster Recovery, Business Continuity, and Emergency Operations. Standards and a review of current support structures will also be reviewed so that improvement and best practice recommendations can be developed.

On-site meetings will be with IT Staff and ideally other department stakeholders who could provide a broader perspective on the business needs. It is anticipated that at minimum, two BerryDunn teams will be on-site for at minimum 3 days.

7. **Develop Draft IT Assessment Report.** The assessment report will incorporate web-survey responses, information gathered from project collateral requested and reviewed by the BerryDunn team, information collected during on-site sessions with project stakeholders (SWOT), and from information gathered in sessions with IT staff. The specific Table of Contents will be established in conjunction with the City project manager prior to on-site sessions. The report will contain recommendations relating to Architectural Standards, IT Infrastructure and readiness, DR, Data Backup and Recovery, and recommendations that generally support the modernization effort. The project expectation document will be shared with the City project manager in advance of the on-site session to review and confirm the content and report structure.

Deliverable: D2. Draft IT Assessment Report

8. **Facilitate on-site review of draft IT Assessment Report.** BerryDunn will schedule an on-site work session with the City Project Team to review the draft IT Assessment Report. The purpose of this meeting is to review the report, identify potential modifications, and confirm

or adjust any assumptions made by our team. Following this meetings, we will incorporate the City's changes into a final version of the Plan.

Deliverable: D3. IT Assessment Report

- 9. Develop and deliver a presentation of the final Report.** Based upon discussions with the City Project Team, we will develop a presentation of the IT Assessment Report highlighting key areas of focus. BerryDunn will deliver the presentation on-site, building buy-in for the recommendations outlined in the report and providing an opportunity for stakeholders to ask questions of BerryDunn and the City's Project Team.

Deliverable: D4. Presentation of IT Assessment

Phase 3: Business Process Review

- 10. Conduct Business Process Planning Session.** To begin this phase of the project BerryDunn will facilitate sessions that will focus on the identification of key business processes that are expected to be impacted by the ERP implementation. Common processes may include Applicant Tracking, Budget Process, Procurement processes, Personnel Actions, or Time Collection, among others. The planning for this work will identify processes to be mapped, and the resources necessary to review the identified processes.

BerryDunn is proposing to develop a total of fourteen business process diagrams. These would include 2 Low Complexity, 6 Medium Complexity, and 6 High Complexity diagrams. Capabilities of modern ERP functionality such as electronic workflow and approvals will be discussed in determining the appropriate processes for review.

- 11. Business Process Identification and Schedule.** Prior to conducting our on-site work, BerryDunn will facilitate a remote session to discuss common business processes, and identify the processes that will be the focus of on-site efforts. Once the processes have been confirmed and agree upon, the schedule will be provided in draft format so that resources can be identified and we can determine who will participate if these sessions. BerryDunn will provide an Information Request Sheet to request available documentation related to the processes to be mapped that may be helpful to us during the project (e.g., current workflow documentation, available benchmarking information). We respectfully request that the City provide the requested information prior to the on-site sessions, as reviewing available information in advance of our on-site work will enable us to be more efficient, become more knowledgeable of the current environment, and make best use of City personnel's time.

- 12. Facilitate on-site business process diagramming meetings.** BerryDunn will meet on-site at City offices with the staff responsible for the processes to be documented. We will facilitate the business process diagramming. Resources that participate in these sessions often find it beneficial to understand the impact to other departments and other individuals within the organization. Microsoft Visio will be used to develop the business process maps.

We have provided an example of a Business Process Map in Appendix A.

Deliverable: D5. Draft Business Process Maps

13. Review Draft Business Process Maps. BerryDunn will distribute draft process maps to be confirmed by project participants. The Project Functional Leads and participating staff will be asked to provide consolidated feedback to identify necessary modifications. We will provide the draft processes to the City Project Team and conduct a follow-up teleconference to incorporate feedback and revisions in the final diagrams. BerryDunn will revise the process maps to identify process improvements discussed and agreed upon that may better align with the capabilities of modern ERP systems.

Deliverable: D6. Finalized Business Process Maps

14. Facilitate on-site business process improvement diagramming meetings. BerryDunn will facilitate an on-site session to identify process improvements to the as-is process maps that may better align with the capabilities of modern ERP systems. These sessions will include Project Functional Leads and those in attendance for the business process mapping sessions. The purpose of the sessions is to recommend enhancements to processes so that they may better prepare the City to embrace the capabilities of an ERP Implementation. BerryDunn will facilitate the sessions and share capabilities of modern ERP systems that may influence the future processes.

Deliverable: D7. Draft Business Process Improvement Maps

15. Review Draft Business Process Improvement Maps. BerryDunn will distribute Draft Process Improvement Maps to be confirmed by project participants. The Project Functional Leads and participating staff will be asked to provide consolidated feedback to identify necessary modifications. We will provide the draft processes to the City Project Team and conduct a follow-up teleconference to incorporate feedback and revisions in the final diagrams. BerryDunn will revise the process maps to identify process improvements discussed and agreed upon that may better align with the capabilities of modern ERP systems.

Deliverable: D8. Final Business Process Improvement Maps

Phase 4: ERP System Selection Assistance

16. Analyze vendor proposals. BerryDunn will facilitate the proposal review process by analyzing vendor proposals and developing an executive-level summary of each. The executive summary memos will identify key areas such as identification of the software being propose, the suggested implementation methodology, project staffing, and factual information relating to the proposing vendor for consideration by the City's Evaluation Team. These documents are intended to be tools that members of the evaluation team can use to focus their review of vendor proposals. The memos will also contain an analysis of each vendor's responses to the ERP Request for Proposal (RFP). Our project work plan assumes that we will be reviewing up to six vendor proposals.

17. Provide ERP System Selection Assistance. BerryDunn will provide the evaluation team documentation that identifies areas of criticality that are impactful to ERP implementations

based upon prior experience with the public sector organizations and the vendor community. BerryDunn will also participate in ERP evaluation sessions to assist the team and share prior experience on similar projects to support the first round of vendor scoring. Our project work plan includes 8 days (64 hours) of on-site consultation and support to be scheduled and provided on an as needed basis.

The system selection assistance will be provided as an hourly service by the proposed Project Manager, Keith Damon, who has more than 20 years of enterprise application experience. The City will only be billed for the hours used, but we feel as though the proposed hours will adequately support and complement the system selection effort.

Deliverable: D9. ERP System Selection Assistance

Phase 5: Implementation Oversight

18. Provide Project Oversight Services. BerryDunn is proposing to provide project oversight assistance for the ERP implementation. The proposed approach is for the BerryDunn Project Manager to be on-site 1 week per month. The on-site project oversight will be coordinated to align with implementation activities and will be coordinated with the City project manager. The typical commitment would be Monday through Thursday, for an estimated 28 hours per month. These services are being proposed based upon an estimated project duration of 18 months.

In this role, BerryDunn will work closely with the City's Project Manager to identify project risks and issues, monitor project activities, provide recommendations to mitigate risks, and assist with oversight of vendor activities. This level of service assumes the City will provide its own full-time project manager. As part of the project oversight activities for the City's ERP system implementation, BerryDunn will provide:

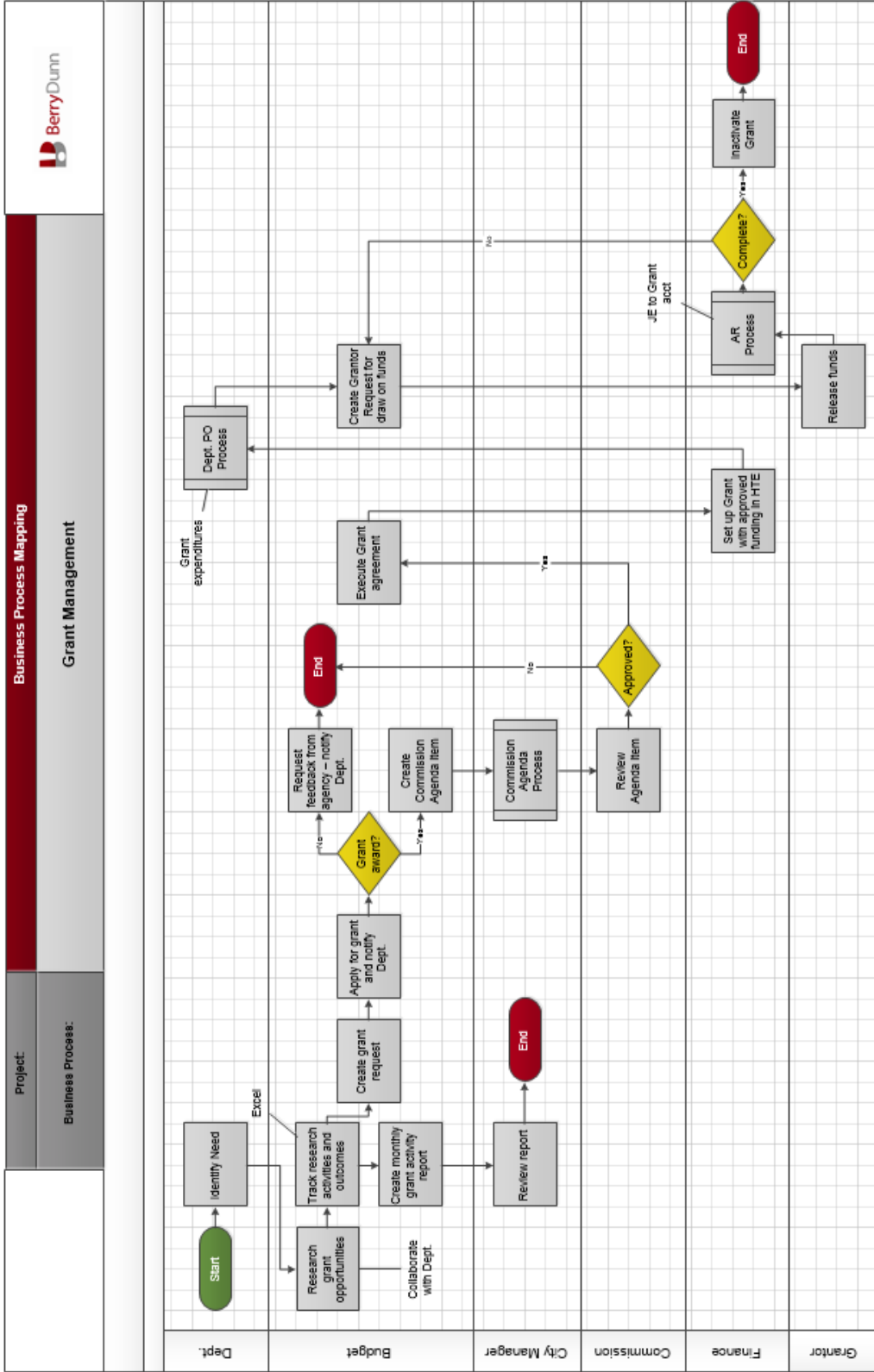
- **Monthly Status Reports** – The Monthly Project Status Reports will describe the activities that BerryDunn staff performed during the previous reporting period, planned activities for the upcoming reporting period, risks and issues associated with the implementation, and recommendations for addressing these risks and issues. Additionally, the reports will outline the activities/mitigation techniques being employed by the City and the implementation vendor to resolve previously identified risks and issues that are still being monitored by our team.
- **Project Status Update Meetings** – Project Status Update Meeting will be scheduled to review project process, identify upcoming project activity, and discuss specific issues that are impacting the project and identify risks that have the potential to impact the project. As risks are identified, mitigation strategies will be developed to diminish to potential impact to the project. BerryDunn will conduct these sessions by way of teleconference, and these sessions are intended to be conducted with the Project Management Team, typically comprised of three to four representatives that may include the project sponsor, the project manager, the IT Director and potentially the Finance Director.

Deliverable: D10. Project Oversight Services

Deliverable: D11. Monthly Project Status Reports

Deliverable: D12. Project Status Updates

Appendix A: Business Process Map Sample



DRUG-FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

Berry Dunn McNeil & Parker, LLC

does:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



Bidder's Signature
November 30, 2017

Date

CITY OF GAINESVILLE

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for IT Consulting Services a living wage of \$11.8269 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: Berry Dunn McNeil & Parker, LLC

Address: 100 Middle Street, Portland, ME 04101

Phone Number: (207) 541-2294

Name of Local Contact Person Charles Snow

Address: 100 Middle Street, Portland ME 04101

Phone Number: (207) 541-2294

\$ NA - Services Not Covered
(Amount of Contract)

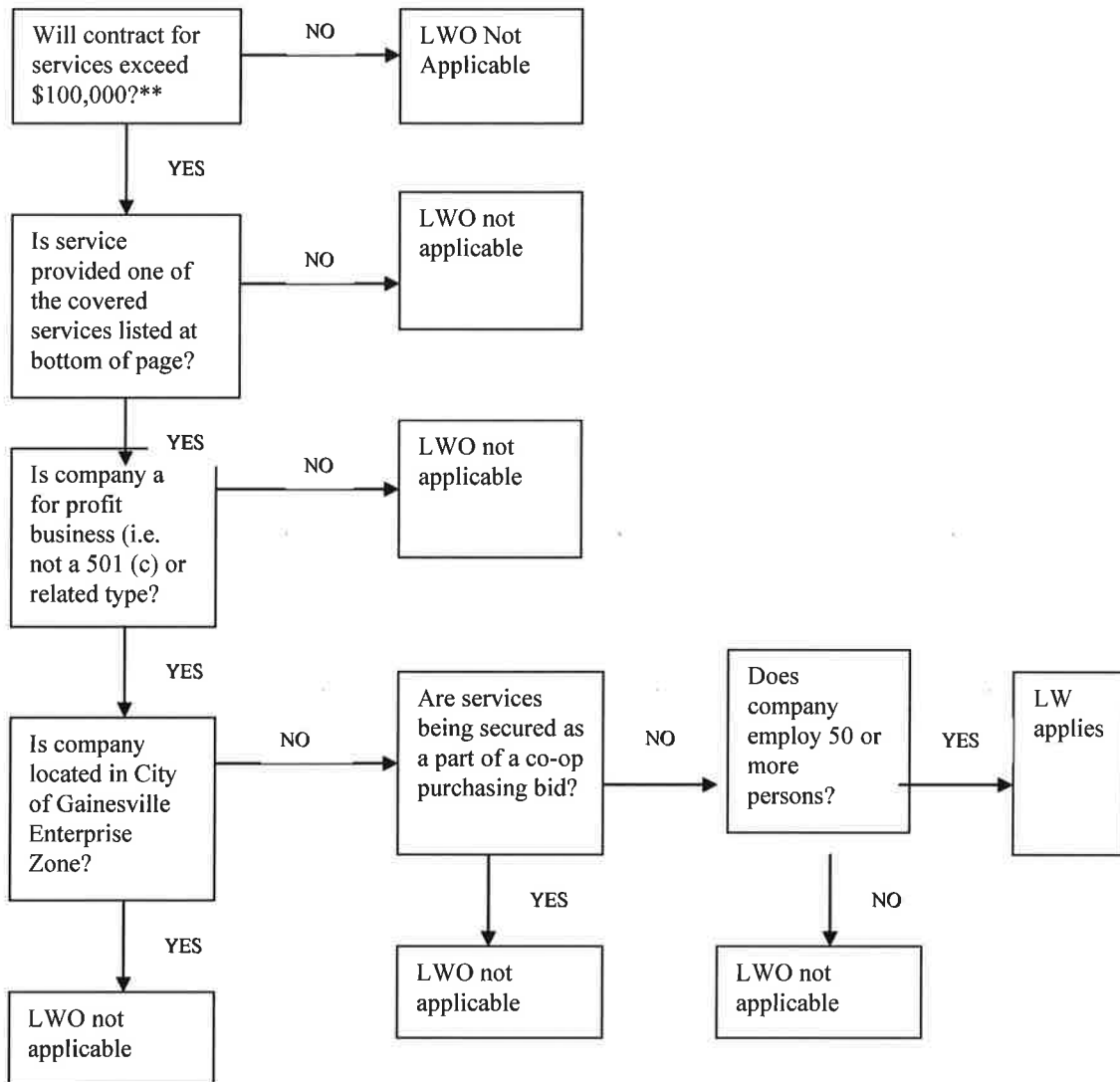
Signature:  _____ Date: 11/30/17

Printed Name: Charles Snow

Title: Principal

LIVING WAGE DECISION TREE

While not all encompassing, the following is provided as a guideline for contractors in determining whether the City of Gainesville Living Wage Ordinance applies to their firm in the performance of specified service contracts for covered services* with the City. Contractors are advised to review the entire text of the Living Wage Ordinance in conjunction with this guideline.



***Covered Services:** food preparation and/or distribution; custodial/cleaning; refuse removal; maintenance and repair; recycling; parking services; painting/refinishing; printing and reproduction services; landscaping/grounds maintenance; agricultural/forestry services; and construction services
****Total value of contract.**

LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit C hereto)

Check one:

- Living Wage Ordinance does not apply
(check all that apply)
 - Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.

- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

PROPOSAL RESPONSE FORM – SIGNATURE PAGE

(submit this form with your proposal)

TO: City of Gainesville, Florida
200 East University Avenue
Gainesville, Florida 32601

PROJECT: IT Consulting Services

RFP#: CMGR-180039-MS

RFP DUE DATE: November 30, 2017

Proposer's Legal Name: Berry Dunn McNeil & Parker, LLC

Proposer's Alias/DBA: BerryDunn

Proposer's Address: 100 Middle Street
Portland, ME 04101

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)

Name: Charles Snow Telephone Number (207) 541-2294

Date: November 30, 2017 Fax Number (207) 774-2375

Email address csnow@berrydunn.com

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s 1, 2, _____, _____, _____, to these Specifications.

TAXES

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

LOCAL PREFERENCE (check one)

Local Preference requested: YES NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions) YES NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions) YES No

SERVICE-DISABLED VETERANS' BUSINESS (check one)

Is your business certified as a service-disabled veterans' business? YES NO

LIVING WAGE COMPLIANCE

See Living Wage Decision Tree (Exhibit C hereto)

Check One:

- Living Wage Ordinance does not apply
(check all that apply)
 - Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

SIGNATURE ACKNOWLEDGES THAT: (check one)

- Proposal is in full compliance with the Specifications.
- Proposal is in full compliance with specifications except as specifically stated and attached hereto.


Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:

 Signature
 By: _____
 Title: _____

(CORPORATE SEAL)

PROPOSER:



 Signature
 By: Charles Snow

 Title: Principal



BerryDunn takes exception to Section Four of the General Provisions on page 16 of the RFP. We have included substitute language below.

“BerryDunn has a robust professional liability policy for acts or omissions of BerryDunn, our agents, employees and subcontractors. This policy contains language within it that states that it will not apply if BerryDunn takes on additional liabilities under contract, such as the agreement to indemnify. In order to help ensure that our clients have the protection of this policy, we ask to remove indemnification language as it relates to negligence in professional services and replace it with the following language: Contractor warrants that they are the holder of a professional liability insurance policy in the amount of \$10,000,000 per claim and \$10,000,000 aggregate for damages or claims by reason of an act or omission of the Contractor in the performance of professional services by Contractor or any Subcontractor for whom Contractor may be liable. Contractor warrants that the services to be performed under this contract met the definition of “professional services” as required by the insurance policy. Contractor warrants that this policy will remain in force for the duration of the contract. Contractor has agreed to provide a certificate of insurance, demonstrating this coverage, with the contract.”

**Response Form – Reference Listing
(to be completed by all Respondents)**

List a minimum of five references for similar projects and contracts, preferably governmental or non-profits, which you have completed within the past three years. References close to the City of Gainesville, Florida are preferred, in the event a site visit is required.

1. CUSTOMER NAME: City of Coral Springs, FL
 ADDRESS: 9551 W. Sample Road, Coral Springs, FL 33065
 TELEPHONE: (954) 654-0580 Email: dpazdra@coralsprings.org
 CONTACT NAME: Mr. Dale Pazdra, Director of Human Resources
 DATE OF COMPLETION OF PROJECT: Project ongoing
 CONTRACT AMOUNT: \$ 233,000

2. CUSTOMER NAME: City of Boca Raton, FL
 ADDRESS: 201 West Palmetto Park Road Boca Raton, FL 33432
 TELEPHONE: (561) 393-7724 Email: sstevens@ci.boca-raton.fl.us
 CONTACT NAME: Ms. Sandra Stevens, IT Director
 DATE OF COMPLETION OF PROJECT: Project ongoing
 CONTRACT AMOUNT: \$ 195,000

3. CUSTOMER NAME: City of Mesquite, TX
 ADDRESS: 1515 North Galloway Mesquite, TX 75149
 TELEPHONE: (972) 216-6287 Email: dmol@cityofmesquite.com
 CONTACT NAME: Ms. Debbie Mol, Director of Finance
 DATE OF COMPLETION OF PROJECT: October of 2015
 CONTRACT AMOUNT: \$ 685,000

4. CUSTOMER NAME: City of Allen, TX
 ADDRESS: 305 Century Parkway Allen, TX 75013
 TELEPHONE: (214) 509-4112 Email: ssiemer@cityofallen.org
 CONTACT NAME: Ms. Shelli Siemer, Assistant City Manager
 DATE OF COMPLETION OF PROJECT: Project ongoing
 CONTRACT AMOUNT: \$ 325,000

5. CUSTOMER NAME: City of Ormond Beach, FL
 ADDRESS: 22 South Beach Street, Ormond Beach, FL 32174
 TELEPHONE: (386) 676-3226 Email: Kelly.McGuire@ormondbeach.org
 CONTACT NAME: Kelly A. McGuire, Finance Director
 DATE OF COMPLETION OF PROJECT: Project ongoing
 CONTRACT AMOUNT: \$ 282,000 to date

My company has been in this type of business for 31 years

ADDENDUM NO. 1

Date: November 16, 2017

Bid Date: November 30, 2017
at 3:00 P.M. (Local Time)

Bid Name: IT Consulting Services

Bid No.: CMGR-180039-MS

NOTE: This Addendum has been issued only to the holders of record of the specifications and to the attendees of the pre-bid conference held on November 14, 2017.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 5:00 p.m. (local time), November 20, 2017. Questions may be submitted as follows:
 - Email: sowersma@cityofgainesville.org
 - or
 - Faxed (352) 334-3163
 - Attention: Melanie Sowers

2. Please find attached:
 - a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.
 - b) List of pre-bid meeting attendees. NOTE: This was a non-mandatory pre-bid meeting.
 - c) Copy of pre-bid presentation.
 - d) Evaluation Criteria Format to replace page 30 (Exhibit E) of the bid documents. Please use this form to submit your requirements and price proposal.

3. Melanie Sowers, Purchasing Division, discussed bid requirements.
 - a. Sign-in Sheet is circulating. If you are attending via phone, please email me your Company name, your name, address and contact information.
 - b. Bids are to be received by the Purchasing office no later than 3:00 p.m. on November 30, 2017. Any bids received after 3:00 p.m. on that date will not be accepted.
 - c. Send questions in writing to Melanie Sowers via email or fax.
 - i. All communication through Melanie only. Do not communicate with other City staff.
 - d. Discussed bid due date, time and delivery location.
 - i. Deliver (or have delivered) to Purchasing by 3 PM on November 30, 2017.
 - e. Various forms (i.e. Tabulation of Subcontractor and Material Suppliers) are to be completed and returned with your bid.
 - i. Sign, date and return all Addenda. Make sure to sign your bid form.

4. Ginny Ahuja, Project Manager, discussed the project scope
- a. The purpose of this RFP is to hire an experienced, full-service IT contractor team to provide technical support services for the City's ERP initiative. A single company, not a group of representatives from different companies, must submit a proposal as the prime contractor.
 - b. We did mention within the RFP document that we have 2,200 employees. Our organization is structured such that General Government employees are under the City Manager and Gainesville Regional Utilities (GRU) report to the City Commission. The 2,200 employees are comprised of both organizations. Our IT Services are supported by GRU. GRU is currently using SAP as their ERP product.
 - c. The City has been using the existing technology for the last 20-30 years. The City has the vision of moving towards being the New American City. We are looking for a strong technological baseline. The ERP Project is the first step to get that framework ready by evaluating our as-is status in term of processes and technology.
 - d. This is an estimated timeline – Implementation planned to start before January 2019 by onboarding experts: IT Consulting Firm Selection, Product Selection, Service Implementer Selection, and Implementation. These are the project milestones.
 - e. The entire ERP program budget is \$7 million to include all the project phases. Please provide us with your best cost for evaluation purposes. IT Consulting is only the first step.
 - f. The City's ERP Team is made up of Executive Sponsors, Sponsors, Project Manager and Functional Leads. This existing team is already in place.
 - g. The scope of work defined in high-level: We are looking for consulting throughout the life cycle of the ERP project. Starting from product selection to implementation and transition to operations. We are expecting the IT consulting firm to conduct a technical feasibility study that includes the IT Architecture readiness. The IT Consultant is expected to be a part of the RFP evaluation team for the ERP Product as well as the Service Implementer.
 - h. Exhibit E will be revised and attached to this addendum. This form contains the layout to be used for all submissions of the qualifications and the minimum requirements. It also shows how the evaluation points will be compiled.

The following are answers/clarifications to questions received at the pre-bid conference:

5. Question: This question is in regards to GRU. Is that going to be included in the scope from the architectural standpoint for General Government?
Answer: We must evaluate GRUs architecture also as their architecture impacts the General Government IT Services.
6. Question: In terms of the process, is the expectation for the consulting firm to actually do the implementation or oversight only?
Answer: Oversight only, not implementation.
7. Question: You mentioned keeping the implementation on track, does this mean the IT implementation, the ERP implementation, or both?
Answer: Both

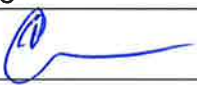
8. Question: Do you know when the last penetration test was performed on the City's Architecture?
Answer: No, however we are planning an internal in 2018 and external in 2019.
9. Question: I had a question about the technical feasibility study. Is that referring to a study of the IT architecture and not the feasibility study on the actual ERP product itself because the product is not picked yet?
Answer: Correct. Just on the city and not the product.
10. Question: Are you looking for pricing to be fixed or hourly rates on consulting services?
Answer: We are looking for the best pricing on the proposals. We are leaning towards time and materials but we would definitely like to know the supplement tables if you have them showing staff and hourly rates.
11. Question: Regarding the budget, if there are infrastructure upgrades and recommendations for enhanced firewalls, is that included in the \$7 million budget?
Answer: We aren't sure at this time what the needs will be and how much that will cost. The consulting firm will help us in analyzing the architecture, which will help us decide which direction to take.
12. Question: Back to the pricing. We aren't sure about the timeline to quote a fixed price. Would you be open to a hybrid model? Some could be fixed and some could be time and material?
Answer: Yes, we are open to that.
13. Question: References deal with the ERP but could IT feasibility studies dealing with similar size and scope of projects count?
Answer: Yes, and should definitely relate to the government side of it.
14. Question: You mentioned cyber security within the RFP and the GRU is the data center, so that is included so that would have to be evaluated to see where we are going?
Answer: Yes.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Berry Dunn McNeil & Parker, LLC

BY: Charles Snow, Principal 

DATE: November 30, 2017

ADDENDUM NO. 2



Date: November 22, 2017

Bid Date: November 30, 2017
at 3:00 P.M. (Local Time)

Bid Name: IT Consulting Services

Bid No.: CMGR-180039-MS

NOTE: This Addendum has been issued only to the holders of record of the specifications and to the attendees of the pre-bid conference held on November 14, 2017.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

Please find attached:

- a) Copy of the black-out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during pre-bid meeting.

The following are answers/clarifications to questions received since the pre-bid meeting:

1. Question: Would the City please elaborate on any additional business drivers for this project beyond those specified in the RFP?
Answer: The City is moving towards the vision of being the “New American City” through a strong technological baseline (please refer to Addendum 1).
2. Question: Would the City please confirm that all functional areas currently serviced by the CGI Advantage applications are to be the focus of this project? Or, are there new or different functional areas the selected consultant should plan to review?
Answer: CGI Advantage serves all the City’s functional areas by interacting with the City’s additional systems and tools. Depending on proposers’ approach to this RFP response, the outcome may require different functional area review. The City is looking for selected consultant’s expertise to achieve the overall outcome of this RFP.
3. Question: Would the City please elaborate on the intent of the selected firm to “build a modern, strategic, and comprehensive technology design” and how this aligns with the Scope of Work? Does the City desire a City-wide technology strategy be developed, or is this in the context of just the ERP replacement initiative?
Answer: The City is looking for strategic recommendations for establishing a strong technology framework to support the City’s vision for the next 20-30 years by assessing the “as-is” technological environment (please refer to Addendum 1).

4. Question: Would the City please elaborate on the intent of the selected firm to “secure data across the City and reduce the risk of cyber-attacks: and how this aligns with the Scope of Work? Does the City desire a City-wide effort in this area, or is this in the context of just the ERP replacement initiative?

Answer: The City is looking for data-security strategic recommendations for establishing a strong technology baseline to support the City’s vision for the next 20-30 years by assessing the “as-is” technological environment (please refer to Addendum 1). The City’s expectation of the awarded vendor is to evaluate the City’s “as-is” environment.
5. Question: Would the City please elaborate on the desired services in Section C.b? Does the City desire the selected consultant develop system requirements for an RFP, develop an RFP, assist with vendor selection, etc.?

Answer: The City expects the selected IT Consultant firm to be a part of the bid evaluation review team for the ERP Product and Service Implementer RFP. This does not include developing the functional system requirements and developing the RFP, however, the “as-is” environment assessment findings will be included in the RFP(s).
6. Question: Does the city desire contract negotiation assistance with the preferred vendor as part of this project?

Answer: The City expects the selected IT Consultant firm to be a part of the bid evaluation review team for the ERP Product and Service Implementer RFP.
7. Question: It is noted that the selected consultant should develop technical process design documents; does the City desire business process diagrams for all City department processes?

Answer: The City expects the IT Consultant to collaborate with the functional leads to provide way/means of integrating the business processes with the technical processes.
8. Question: For the purpose of providing cost estimates to provide implementation project management services, does the City have a preferred level of effort or implementation timeline estimate that all proposers should use to consistently base their estimates? Or, would an hourly rate be acceptable?

Answer: We are looking for the best pricing on the proposals. We are leaning towards time and materials but we would definitely like to know the supplement tables if you have them showing staff and hourly rates (please refer to Addendum 1).
9. Question: Does the City desire status reports as part of the system selection phase? If so, at what frequency (e.g., bi-weekly)?

Answer: Depending on the proposers’ approach provided in the written response to this RFP (please refer to Addendum 1, Evaluation Criteria) for consideration.
10. Question: Does the City desire any presentations be made by the selected consultant as part of the system selection phase? If so, how many and to what audiences?

Answer: Depending on the proposers’ approach provided in the written response to this RFP (please refer to Addendum 1, Evaluation Criteria) for consideration.

11. Question: Does the City have any target milestone dates for the consultant engagement? For example, date the ERP RFP is issued, date of implementation kickoff, etc.?
Answer: Yes. The City's estimated timeline is to begin implementation before January 2019 (please refer to Addendum 1).
12. Question: Does the City have a budget for this project? If so, what is it?
Answer: The budget for the entire ERP project is \$7 million (please refer to Addendum 1).
13. Question: We are aware that the City released an RFP for ERP Consulting Services in September of 2016 and that it was awarded. Was the scope of that RFP completed and how does it differ from the City's current RFP? In addition, is the firm that was awarded the previous RFP eligible to participate in this RFP process?
Answer: The September 2016 was a functional RFP whereas this is an IT Consultant RFP. Yes, the firm that was awarded the previous RFP is eligible to participate in this RFP process.
14. Question: On Page 2 of the RFP document, under "C. Proposal Submission", it states that "proposal must be received by November 30, 2017 at 3:00 p.m. local time at which all proposals will be publicly opened." Can you please describe the specific information of each proposal that will be disclosed at this public opening?
Answer: Because there will be evaluations that include more than just price, we will only make available which vendors have submitted bids and verify that all required documents are attached and signed. We will not be disclosing price or other bid details at this time.
15. Question: Is a separate, sealed price proposal required, or should all proposal contents be included in one document? If separate documents, does it need to be sent in a separate envelope?
Answer: It can all be included in one document; a separate envelope is not needed.
16. Question: If there is to be a separate, sealed price proposal, does the City also require one (1) original and six (6) hard copies, and one (1) electronic copy of the price proposal as well?
Answer: All information can all be included in one document, but we do still need 1 original, 6 hard copies, and 1 electronic version.
17. Question: As specified on page 6, "Living Wage" is not a covered service under this contract – therefore, do vendors need to fill out Exhibit B?
Answer: Submit the form, but write N/A, if it is not needed.
18. Question: On page 7, "T. Local Preference" specified "If Local Preference is requested by the proposer, the attached Exhibit A must be submitted with the proposal." If a vendor is not requesting Local Preference, do we need to submit Exhibit A?
Answer: Submit the form, but write N/A, if it is not needed.
19. Question: On page 9 under "B. Minimum Requirements", point "f." states that "Consulting firm shall provide for their own use laptops, cell phones and all applicable licenses." Can you please specify what "applicable licenses" are required for the delivery of services under this contract?
Answer: The applicable licenses depend on the proposers' approach provided in the written response to this RFP (please refer to Addendum 1, Evaluation Criteria).

20. Question: On page 9 under “B. Minimum requirements”, point “i.” states that “Consultant Firm onsite presence is required”. Does this mean that 100% of all work performed under this contract must be performed on site at City offices?
Answer: Yes, the City prefers the consultant to be on-site, however, the City is open to any recommendations.
21. Question: On page 11 it states that “A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with the proposal if a local preference is requested. If we are not requesting Local Preference, do we still need to provide these documents/information?
Answer: No.
22. Question: On page 11 under “B. Qualification/Statement of Qualifications”, it requests a description of “financial stability.” Aside from a description confirming such via a statement, are proposers to include specific financial documentation in our proposals, or only if requested upon award?
Answer: Please provide your most recent financial statement to meet this requirement.
23. Question: Should all of the proposal content mentioned on page 11 under “A. Format and Contents of proposal” be included in one document, or would the City like proposers to break each section into separate documents?
Answer: Please refer to format provided in Addendum 1.
24. Question: Does the “Attest” signature on page 28 of the RFP document need to be notarized?
Answer: No.
25. Question: According to Addendum 1, proposers are to remove page 30 of the original RFP document and replace it with Evaluation Criteria Format included in Addendum 1. Is this the specific format and template we are to use for our entire response or may we include additional content as described in the original RFP in section III-Proposal Format? If we are allowed to respond with additional content, please advise if we must also respond by filling out the boxes within the new Exhibit E as well.
Answer: If you think the content is valuable for evaluation and does not fit within the box, please provide an attached document with correct reference. Otherwise, the City prefers to consolidate the information in the proposal format.
26. Question: Exhibit E-Pricing seems to ask for fixed pricing by project deliverable. During the Pre-Proposal Conference, it seemed as though the City would accept Time and Material pricing. Please provide guidance? In either scenario, is the City looking for firm estimates for each deliverable in this response?
Answer: We are looking for firm prices that include total cost including details for each component.
27. Question: Several selections of the response documents do not indicate the need to be notarized. Can the City please confirm which response documents need notarization?
Answer: No documents require notarization.

28. Question: It is clear that no subcontracting is allowed. Are proposers able to use Independent Contractors working for our company if they are the best resource for the project?

Answer: No.

29. Question: The City of Gainesville has identified the ERP team including functional leads. Is the ERP team who the winning proposer will be interacting with to develop the Technical Feasibility Study or will it be necessary to also interact with functional leads at each of the Cities municipal services?

Answer: The awarded IT Consultant Firm is expected to interact with City's internal stakeholders to achieve the expected outcomes.

30. Question: It is understood the GRU is in scope and will be part of the feasibility Study. Is GRU included on the ERP team and are they also part of the evaluation team?

Answer: GRU is the City's IT partner supporting IT operations. GRU is a passive participant for the City's ERP initiative. They are not a part of the ERP functional team or evaluation team.

31. Question: Is it the City's intention to have the winning firm engaged full time for the entire ERP implementation?

Answer: Yes, we want the IT Consultant firm representation throughout the entire ERP initiative; however, the City is open to hear your recommendations about successful engagement model with the same expertise in projects of this nature.

32. Question: Can the City confirm its daily billable work hours (7 billable hours per day, 8 billable hours per day, etc.) and overall hours each day (9am – 5 pm, 8am-4pm, etc.)

Answer: Monday-Friday 8am-5pm

33. Question: Can the City confirm all City Holidays for the calendar year?

Answer: These are the City Holidays for FY2018, which spans a calendar year.

Veterans' Day Friday, November 10, 2017(observance date)

Thanksgiving Day Thursday, November 23, 2017

Day after Thanksgiving Friday, November 24, 2017

Christmas Day Monday, December 25, 2017

Additional Holiday Tuesday, December 26, 2017

New Year's Day Monday, January 1, 2018

Martin Luther King, Jr.'s Birthday Monday, January 15, 2018

Memorial Day Monday, May 28, 2018

Independence Day Wednesday, July 4, 2018

Labor Day Monday, September 3, 2018

34. Question: Page 12 of Addendum 1 asks if "Key staff includes the Enterprise Solution Architect and IT Technical experts". However, these specific roles/personnel are not mentioned in the RFP. Does the City expect us to provide two specific individuals, one being an Enterprise Solution Architect and the other an IT Technical expert?

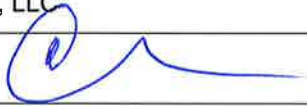
Answer: Not necessarily. The City is looking for an IT Consulting Firm to implement the services outlined in this RFP; we do ask that you provide your best team approach for proposal.

35. Question: When was the last Cyber/Information Security Assessment/Audit that was performed on the City, and who performed it?
Answer: Please refer to Addendum 1.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Berry Dunn McNeil & Parker, LLC
BY: Charles Snow, Principal 
DATE: November 30, 2017