CHRYSALIS
Government Solutions

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September 22, 2016

Ms. Diane Holder
Purchasing Division
CITY OF GAINESVILLE
200 East University Avenue, Room 339
Gainesville, Florida 32601

RE: **RFP FADM-170007-DH for Enterprise Resource Planning Consulting Services**

Dear Ms. Holder,
Chrysalis Government Solutions is pleased to provide the City of Gainesville with a proposal to provide consulting services to assist in the planning, acquisition and implementation of an Enterprise Resource Planning (ERP) system. Attached please find our RFP response. Chrysalis takes no exception to any of the clauses within the RFP and will comply with all necessary requirements, if awarded this project. Here are just a few of the reasons we believe the City of Gainesville should choose Chrysalis for this effort:

Our Public Sector Knowledge
Chrysalis has demonstrated public sector expertise, and we will apply our knowledge of best practices and public sector-specific requirements to this engagement.

Our Expertise
Chrysalis' consultants have provided needs assessment, team dynamics and organization, system selection including RFP development and contract negotiation, system implementation, and organizational change management services to a number of clients across many industries, and in particular, for the public sector. Our firm also has extensive experience in the assessment of business processes and supporting technologies, as well as the application of change management techniques in support of large-scale implementation efforts. We are acutely aware of the need for financial oversight and we ensure that project timelines are adhered to in order to avoid cost overruns.

Our Independence
Chrysalis is not currently, nor has it ever been, aligned with any provider of software. Our consultants have broad expertise with many systems which support a variety of public sector processes, and will bring this breadth to bear when assisting in this effort. We believe that this

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independence provides value to our clients, in that we are uniquely suited to provide unbiased assessments of the relative strengths and weaknesses of enabling technologies.

Our Dedication

As a small consulting firm, Chrysalis appreciates the significance of each client we serve. Chrysalis is dedicated to "doing what it takes" to complete client projects on time and within budget in order to maximize convenience, benefit, and return on investment. Expect the full and uncompromised attention of all team members, as well as hands-on, active engagement from executive management.
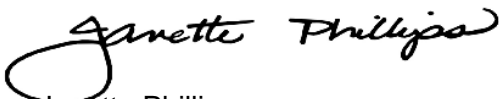
Our Proven Success

Our clients tell us that we have distinguished ourselves from our competition by our ability to facilitate and coordinate contributions from many participants, align and gain buy-in from diverse stakeholders, anticipate and mitigate problems, and by making client satisfaction and success our top priority.
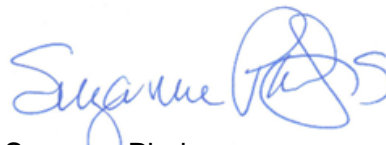
Chrysalis has many years of experience with the complete life cycle process surrounding ERP system implementations for public sector clients. We have confidence that we will enable your team to make good decisions regarding the need for a new ERP system for its financial and human resources departments, including complex payroll requirements. Because we have successfully assisted several public sector entities in this work, our experience and knowledge will benefit City staff during this process.

We look forward to further discussion with you, Ms. Holder, and your committee regarding our proposal and our capabilities. We hope you will agree to meet with us during your RFP analysis in order to further discuss your organization's needs and Chrysalis Government Solutions' experience, in more detail.

Sincerely,

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Proposal to Provide

ENTERPRISE RESOURCE PLANNING (ERP)

CONSULTING SERVICES

CITY OF GAINESVILLE, FLORIDA

September 22, 2016

Submitted by:

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2. TECHNICAL PROPOSAL

Our Understanding

We understand that the City of Gainesville's current ERP with associated peripheral systems for its financial, human resources, and payroll processes are outdated and that this aging infrastructure does not fully support the City's current and future business requirements. City leadership have identified this weakness, and wish to engage the services of an experienced firm specializing in the assessment of enabling technologies within the public sector to perform an objective assessment for the purpose of understanding the current process and system landscape, and to identify gaps and shortcomings with the current supporting technologies. In so doing, this consultant will investigate the degree to which the currently technology environment supports the City's immediate and future priorities, and assess the pros and cons to upgrading he current solution(s) or implementing a new ERP which can provide more comprehensive support to the City of Gainesville staff and processes.

The City views this effort as an opportunity to scrutinize current business processes and make improvements which reflect best practice. In support of this effort, the City would like to engage a consulting firm which places emphasis upon underlying business processes, and views technology as an enabler. This consultant should also be, first and foremost, an experienced change management practitioner.

As part of this assessment, the consultant will prepare a business case which outlines the feasibility and (potential) Return on Investment associated with the adoption of new technology. The consultant will also distill the information down to a few key decision points, which the City leadership may leverage to establish a going-forward plan.

Chrysalis Consulting is uniquely qualified to support the City in this project and discovery process. We have been supporting public sector organizations throughout the United States with technology and business process consulting services, including technical assessments, new project implementations (also triage support of in-process projects) for both infrastructure and application-based solutions (such as ERP), risk assessments, business process re-engineering, project definition and needs assessment, RFP writing, vendor solicitations, RFP analysis, vendor selections, and implementation assurance/program management for more than 15 years. Because Chrysalis does not sell or represent any hardware or software, we are able to support our clients (sitting on the client side of the table) to any and all vendors of technology, ensuring success in the requirements definition and solicitation phases of projects as well as leading the complex implementation phase in support of our clients.

Our Qualifications

Our clients tell us that we have distinguished ourselves from our competition by our ability to facilitate and coordinate contributions from many participants, align and gain buy-in from diverse stakeholders, anticipate and mitigate problems, and by making client satisfaction and success our top priority. Chrysalis has many years of experience with the complete lifecycle process surrounding ERP system implementations for public sector clients. We have confidence that we will enable your team to make the right decisions regarding the need to upgrade or implement a new ERP system for its financial and human resources departments, including complex payroll requirements. Because we have successfully assisted several public sector entities in this work, our experience and knowledge will benefit City staff during this process. This RFP response includes brief, high level details regarding certain client engagements that Chrysalis has successfully completed. (See Tab 4, Qualifications.) We look forward to discussing these projects in further detail very soon.

Our Approach

Our approach to this effort for the City will consist of three phases: **Needs Assessment**, **Selection**, and **Implementation**.

Our philosophy for this effort will be rooted in our commitment to helping the City achieve its goals, and by taking ownership of the City's priorities as our own. Chrysalis is very adept in this role. As Marsha Stone, Senior Director of Commercial Enterprise for the Indianapolis Airport Authority, said, "*Chrysalis takes you by the hand.*"

Phase I — Needs Assessment

Chrysalis' approach to the Needs Assessment phase incorporates our philosophy that for an organization to function at peak capacity, consideration must be given to business processes, supporting technologies, and the organization itself. These three components work in concert and should not be viewed independently.
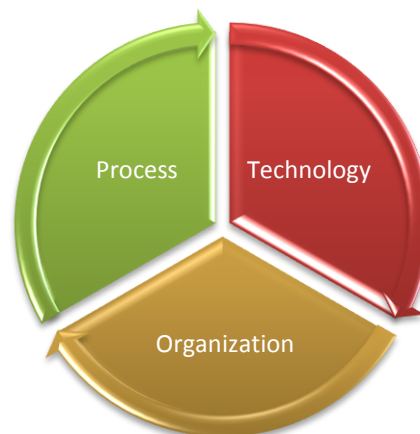
Within this phase, Chrysalis takes a "blank sheet" approach to understanding the City's existing business processes, supporting technologies, and organizational model. In support of this effort, Chrysalis team members will conduct interviews and focus group discussions with City staff, Board members, and others as appropriate.

Process Assessment

The introduction of new technology not only may, but *should* impact the City's business processes. Chrysalis will, through onsite interviews, review and assess business processes which support the City's current finance and HR operations.

Chrysalis will bring its considerable expertise in public sector processes to bear when identifying opportunities for business process redesign and improvement. In so doing, our team will educate City stakeholders regarding the current state of the art in technology in order to provide decision support going forward.

Chrysalis will also utilize its proprietary *Change Assessment* methodology to identify and categorize those processes that will be impacted by the introduction of enabling technologies. Change assessment categories will include:

CHANGE CODE	MEANING
New	Process must be introduced along with the enabling technology
Eliminate	Process will be rendered obsolete by the new technology
Migrate with Change	Process will undergo some degree of change in the future environment.
Migrate without Change	Process will remain unchanged in the future environment.

Organizational Assessment

Chrysalis will conduct a review of the organization currently supporting finance and HR processes. Chrysalis will benchmark the City's staffing model against public sector standards, and in so doing, identify potential areas for realization of efficiencies and improved morale.

In our experience, organizations tend to have staffing structures that have evolved over time. In many cases, tasks and even entire roles become redundant or obsolete, yet continue to exist. Job descriptions (if they exist) are often outdated and no longer reflect the actual organization and its processes.

In addition, Chrysalis will examine skill sets that will be required in the future, assuming the introduction of enabling technologies. To the degree to which City employees do not currently possess the requisite skills, Chrysalis will identify strategies for bringing the organization and its requirements into alignment. These strategies may include technology training, process and/or skills training, and (potentially) reassignment of personnel.

<u>Technology Assessment</u>

Chrysalis will utilize its *Technology Risk Management* methodology to assess the level of risk posed to the organization by obsolete technologies, unsupported applications, and deficiencies related to data sharing, data storage and backup, and usability. Risks common to aging and unsupported technology include, but may not be limited to, the following:

◇ *Potential disruption of business activities in event of catastrophic failure*

◇ *Data loss*

◇ *Security breach*

◇ *Reduced data integrity owing to redundant manual entry*

◇ *System does not support business process objectives*

◇ *Loss of system expertise within the organization owing to inadequate documentation coupled with loss of key personnel*

◇ *etc.*

Chrysalis will examine the City's existing technical infrastructure, and provide high-level recommendations for modifications and/or replacements to the existing City infrastructure. These recommendations will be based upon our assessment of the City's current and future needs, and will include recommendations for servers, network infrastructure, workstations, ancillary devices, and so forth.

<u>Risk Assessment</u>

Chrysalis will also conduct a project risk assessment to determine the potential risks to the organization associated with a software implementation project of this magnitude. Risks common to projects such as this include, but may not be limited to, the following:

◇ *Disruption of business activities*

◇ *Data loss*

◇ *Security breach*

◇ *Lack of employee acceptance*

◇ *System does not meet requirements*

◇ *Loss of key personnel*

Chrysalis will document risks associated with this project and identify corresponding mitigation strategies. These mitigation strategies will be incorporated into all future project planning and documentation activities.

<u>Definition of Project Roles and Responsibilities</u>. We will assist the City in forming the Project Team, and further defining roles and responsibilities for the ERP effort. We recommend that the City provide individuals in the following roles:

◊ **Project Executive**. The Project Executive serves to promote the project throughout the organization and to outside stakeholders.

◊ **Project Sponsor**. The Project Sponsor provides overall guidance and oversight on project strategy and scope. The Project Sponsor will lead the Leadership Team, assisting them in reaching consensus on cross-functional issues as they relate to the project. The Project Sponsor will also provide direction to the Chrysalis Project Manager.

◊ **Functional Sponsors**. Functional Sponsors provide project guidance and oversight in functional areas for which they are responsible. Functional Sponsors are tasked with making decisions and resolving project issues which impact operations, particularly those which span functional areas. Functional Sponsors are members of the Leadership Team.

◊ **Functional/Process Owners**. The "doers" of the effort, Functional and/or Process Owners are responsible for identifying processes and procedures to be supported by the new system environment. Functional/Process Owners will be the primary decisionmakers regarding selection criteria. Functional/Process Owners will be asked to sign off on deliverables related to their assigned functional areas.

◊ **Technical Support Staff**. Technical support staff will be called upon to answer questions, provide documentation, and also to provide input into the overall technology strategy for the selected system(s).

The City should plan for the following average levels of participation throughout this effort:

CITY ROLE	AVERAGE PARTICIPATION
Project Executive	5-10%
Project Sponsor	5-10%
Functional Sponsors	10-20%
Functional/Process Owners	30-35%
Technical Support Staff	5-10%

Stakeholder Analysis

Stakeholder understanding and acceptance is the most critical success factor to any project. Projects typically fail because individuals leading the implementation fail to understand the stakeholder community and /or involve them in an effective manner, not because the technology failed. For this reason, Chrysalis takes a stakeholder-driven approach to each project.

We will look at each stakeholder group associated with the City and identify how they will be impacted by the project. What roles will be required to learn the new system and to what

degree? Will customers and/or vendors be required to interface directly with the system? Are there any potential process or policy changes that may impact non-City stakeholders?

Once the stakeholder plan is complete, we will create a plan detailing when and how to involve each stakeholder group. This plan will be incorporated into the master project plan as well as training, testing and communication plans associated with the project. If they have not already, individual champions or leaders will be assigned to significantly impacted stakeholder groups.

Identify Change Management Considerations

As described more fully under "Critical Success Factors," Chrysalis understands that organizational change must be managed from the very beginning. Typical change management considerations for projects of this type include:

- ◇ Lack of organizational will to adopt new technologies and/or processes;
- ◇ Fear for job security;
- ◇ Anxiety surrounding being "up to the task" of learning a new system;
- ◇ Disconnect between employee areas of "responsibility" and "control";
- ◇ Current organization lacks skills to support new technologies;
- ◇ Negative "institutional memory" regarding prior failed or abandoned efforts;
- ◇ Etc.

The City will undoubtedly contend with one or more of the above; however, there are also considerations which are unique to the City of Gainesville. Chrysalis will, through interviews and observation, identify these considerations so that mitigation strategies may be devised at project outset.

Please see "Critical Success Factors" for a discussion of Chrysalis' approach to change management.

Cost/Benefit Analysis

Once the desired future state is fully understood and documented, Chrysalis will develop a business case for implementing a new financial and human resources software solution.

The first step is to quantify, based upon input from the City, current costs associated with the existing technologies, processes, and organization.

Next, we will estimate the costs associated with the implementation of the new software. Our cost analysis will include not only estimated project-related costs (such as software, hardware, consulting fees, data conversion, training, and so forth), but also estimated Total Cost of Ownership (TCO), which will demonstrate the ongoing (steady state) costs associated with the new software.

Finally, we will conduct an analysis of processes which may be improved, and the methods for achieving these improvements. Specifically, we will quantify the anticipated efficiencies to be gained, both as a result of implementation of supporting technology and by improvement of the underlying business processes.

Once the above information has been compiled, Chrysalis will utilize a robust business case template which identifies existing costs, projected project costs, and anticipated benefits in order to calculate expected Return on Investment for this effort. Chrysalis utilizes a multi-faceted approach to calculating ROI, which includes several traditional measures of ROI:

◇ *Internal Rate of Return (IRR)*
◇ *Net Present Value (NPV)*
◇ *Breakeven/Payback Period*
◇ *Annual Savings*

We believe that utilizing all of these methods gives a more complete picture of the value of the project. These methods are described more fully below.

Internal Rate of Return (IRR)
IRR is a useful method in that it determines, given a set of assumptions regarding financial costs and benefits, an annualized percentage return on a given investment. This allows the user to compare the IRR to one or more measures of the organization's cost of capital to determine if the investment is desirable. IRR is a simple, accurate, test of the return on a project. A drawback to the IRR method is that it does not consider the absolute value of either the investment or return, just the percentage value.

Net Present Value (NPV)
In contrast to IRR, Net Present Value calculates, given a particular discount rate, the dollar value of a project. This is useful in that it allows comparison of projects to determine which is most profitable. If the organization is able to do so, it should in theory undertake any project for which NPV is greater than zero. Unfortunately, choosing the appropriate discount rate is problematic, and seemingly small changes to that rate can result in significant changes in the NPV.

Breakeven/Payback Period
The Payback Period is simply the number of years (or months) until the entire cost of a project is "paid back" in the form of cost savings. It does not take into account the time value of money or the absolute scope of the project; it simply identifies how long it will take for the project to "break even."

Annual Savings

Many organizations assess capital expenditures on the basis of their impacts to steady state spending. This method may be appealing to those organizations for which reduction of operating costs may be a priority.

Projects in the public sector present unique challenges for the calculation of ROI. For example, the choice of an appropriate discount rate for the NPV calculation is difficult because the sources of funds may have no readily-identifiable costs. The "cost" of those funds may be that other governmental expenditures, with social rather than economic benefits, may be foregone. Based on this experience with public sector clients, Chrysalis will identify and quantify these costs in order to develop an appropriate measure of Return on Investment for the County.

Of course, the City will wish to take into consideration certain non-financial benefits to be realized with the new financial software. Chrysalis will work with City staff to identify and assign value to its priorities within the areas of Process, Technology, and Organization. Based upon our experience, here are some potential areas of focus:

Process Benefits	**Technology Benefits**	**Organizational Benefits**
• Reduction of Time and/or Manpower ($$) • Reduction of paper utilization ($$) • Application of Best Practices • Performance Measure Improvements • Increased service levels to internal and external customers • Improved access to information • Higher quality data	• Improved audit trail • Enhanced security and privacy • Increased ability to integrate with technology standards, now and in the future • Support of long-term IT strategies	• Headcount reduction ($$) • Reduced training time ($$) • Ease of use • Increased job satisfaction and higher morale • Standardization across functions (to support cross-training)

Assessment Findings and Recommendations

Based upon our assessment of the City's processes, technologies, and supporting organization, Chrysalis will make a recommendation regarding whether to retain the current system(s), modify, upgrade, and/or enhance the current system(s), or initiate a search for a replacement of the City's existing software applications. In so doing, Chrysalis will consider the following:

◊ Complexity and/or uniqueness of the City's business processes;

◇ Expected life of underlying technology and supporting hardware and infrastructure;
◇ The City's user population;
◇ The skill level of the City's user base;
◇ The availability of resources for a future implementation effort;
◇ Costs associated with recommended solution; and
◇ Public sector finance best practices.

The above recommendations will be accompanied by a high-level estimate of implementation costs, including software, hardware, consulting fees, data conversion, training, and so forth.

Phase II — Request for Proposal Development

As a vendor-neutral organization, Chrysalis provides a truly unbiased approach to software selection. Chrysalis emphasizes the importance of ensuring "apples-to-apples" comparison of diverse vendor offerings. We will identify the gap between each vendor's proposed project scope and what is needed for the offering to be successful for the City, and then use this information during selection and negotiation.

Should the City opt to pursue an alternative system or systems, Chrysalis will assist the City in articulating and achieving the desired future state. Key activities in this phase will be:

◇ Identification of key functional and technical requirements, including "knockout criteria";
◇ Identification and pre-qualification of potential vendors;
◇ Preparation of vendor "scorecard";
◇ Preparation of vendor demonstration scripts; and
◇ Preparation, review, and approval of RFP document;
◇ Hosting of Pre-Bid session;
◇ Responding to vendor inquiries and issue addenda;
◇ Evaluation of submitted proposals;
◇ Identification of vendor shortlist;
◇ Vendor demonstrations;
◇ Site visits (potentially);
◇ Preparation of 5-year cost projections;
◇ Vendor selection; and
◇ Contract negotiation.

Functional and Technical Requirements; Knockout Criteria

Chrysalis will prepare a listing of functional and technical requirements for the future state. We will also develop a listing of Vendor Knockout Criteria. This list contains a handful (not more

than ten) of **absolute minimum requirements**, without which any potential vendor will be immediately disqualified. Examples of knockout criteria might be:

◊ *General Ledger must support a minimum of four business units;*
◊ *Transaction processing must be real-time;*
◊ *Application must include a project tracking module;*
◊ *Application must include or easily integrate with a property management/rent roll system;*
◊ *Must be able to define purchasing approvals by login and dollar amount;*
◊ *Application must support encumbrance accounting;*
◊ *Must have ability to attach drawings and other documents to purchase orders;*
◊ *etc.*

The identification of knockout criteria greatly simplifies the proposal evaluation process, and by communicating these criteria in advance, potential bidders may avoid investing significant time and energy into the preparation of a proposal that will not be considered.

As part of this effort, Chrysalis will assist City management in obtaining the buy-in of key project and staff members for the proposed future state of processes and technology for the City. This buy-in is crucial to the success of the software selection effort and the resulting implementation.

Vendor Identification and Pre-Qualification
Based upon the identified requirements and knockout criteria, Chrysalis will identify potential commercially-available software solutions and preliminarily assess the degree of "fit" to the City's operations.

Cost Proposal Template
Chrysalis will prepare a template for submission of pricing information by respondents. This template will request pricing detail to an appropriate level of granularity to ensure clarity. Provision of this template will facilitate an apples-to-apples comparison of vendor responses, and vendors will be required to follow this format in order to be considered.

Proposal Scorecard
Chrysalis will work with the City to determine a Proposal Scorecard against which proposals will be evaluated. Chrysalis will help to ensure that the Scorecard accurately reflects the priorities as identified by the City during the Assessment.

Vendor Demonstration Scripts
The Chrysalis team will prepare detailed demonstration scripts designed to give priority to key features and functionality identified as critical for the City. These scripts will include specific data sets that the bidders will be expected to incorporate into their demonstrations.

RFP Development, Review, and Release

Utilizing all of the above information, Chrysalis will author a Request for Proposal. In so doing, Chrysalis will work closely with the City's staff to ensure the inclusion of required Terms and Conditions, compliance with applicable laws, and the accurate restatement of information gathered within the project. Other key components will likely include:

◇ A description and diagram of the current system landscape, including (and especially) integrations and/or interfaces which are currently in place and which will be required in the future state;

◇ Mandatory proposer criteria, which are "knockout factors" for the vendors themselves (e.g., length of time in business, number of installations within public sector environments, etc.)

◇ A current and future state model of business process within the subject areas, including any business process improvements for which selected vendor will be responsible;

◇ A description of the existing technology landscape at Lake City, along with requirements for proposers to provide information regarding additional hardware or supporting software required to utilize their product;

◇ Weighted proposal evaluation criteria

◇ etc.

The completed RFP document will be circulated to all key staff for review and approval prior to its release.

Pre-Bid Session

Chrysalis recommends that a pre-bid session be conducted, not only for the benefit of interested bidders, but also for the City. These sessions are often instructive for the bid solicitor, and allow opportunity for information gleaned during the sessions to be incorporated into the RFP document via addendum.

Response to Vendor Inquiries

Clarity in the RFP document is of utmost importance in achieving a true apples-to-apples comparison of vendor and product offerings. Chrysalis will coordinate responses to vendor inquiries and the issuance of addenda during the procurement period. In so doing, Chrysalis will adhere to procurement policies and practices dictated by the City, and also lend specific technical expertise toward defining scope, requirements, and other considerations.

Proposal Evaluation

Once proposals have been received, Chrysalis will assist the City in evaluating them according to the criteria outlined within the Proposal Scorecard. Additionally, Chrysalis will provide the City with an analysis of the costs, benefits, and risks associated with each vendor's proposal.

Chrysalis will also conduct vendor reference checks and provide a concise summary of information gathered during this effort to the City.

The outcome of the proposal evaluation step is to identify a Vendor Shortlist, which are those bidders who shall be invited to give a demonstration at the City.

Vendor Demonstrations

Part of the selection process will include vendor demonstrations. These demonstrations will be delivered onsite at City offices at a time and location convenient to the City. The Chrysalis team will prepare detailed demonstration scripts designed to give priority to key features and functionality identified as critical for the City. These scripts will include specific data sets that the bidders will be expected to incorporate into their demonstrations.

Chrysalis will prepare a Vendor Demonstration Evaluation Tool for all members of the project team. This tool will allow Chrysalis and City team members to provide quantitative rankings as well as qualitative observations during vendor demonstrations. Chrysalis will then compile these inputs into a comprehensive document for review by the City.

Site Visits

This process may also include visiting installed sites for each software solution. If desired by the City, Chrysalis will assist the City in preparing for these visits by creating a Site Visit Quick-Reference Guides for site visit participants. This guide includes, among other things, suggested questions to ask, elements to observe, and a tool for a site visit evaluation.

5-Year Cost Projection

For solutions offered by shortlisted vendors, we will prepare an analysis of the costs associated with the implementation of the new software. Our cost analysis will include not only project-related costs (such as software, hardware, consulting fees, data conversion, training, and so forth), but also estimated Total Cost of Ownership (TCO), which will demonstrate the ongoing (steady state) costs associated with the new software.

Best and Final Offer

Depending upon the responses received, the City may be well-served to solicit Best and Final Offers from shortlisted vendors. Benefits to this approach include not only the potential to garner more favorable pricing, but also the ability to refine scope beyond the original RFP.

Vendor Selection and Recommendation

Chrysalis will facilitate the City through the process of selecting, based upon all of the above inputs, the new technology and implementation partner. Once the desired solution has been identified, Chrysalis will prepare a Findings and Recommendations report, detailing the rationale for the selection. Chrysalis will also be pleased to prepare a presentation to the City Council.

Contract Negotiation

Chrysalis will utilize an in-house expert to assist the City with contract negotiation by lending expertise gained in similar efforts. Chrysalis has extensive experience in the review of licensing agreements, contracts for technology services, hosting agreements, hardware purchase agreements, and so forth. Chrysalis has consistently achieved favorable contract terms on behalf of its clients.

When crafting the agreement(s), the City should:

1. **Incorporate Key Performance Measures**. The City will have justified the expenditures for the new property tax system based in large part upon process improvements to be gained. We recommend that certain key performance goals be included within the contract language and that a portion of the vendor's compensation be tied to achievement of these objectives.

2. **Establish Limits to Long-Term Costs**. Ensure that ongoing support and maintenance costs have clearly defined limits with respect to price increases, forced upgrades, and so forth.

3. **Ensure that Remedies are Clearly Defined**. Not only should the expectations of the vendor be clearly outlined, but specific remedies (in the case of breach) should be defined as well.

4. **Ensure Compliance with the City's Security/Privacy Requirements**.

Phase III — Implementation

Chrysalis takes an holistic approach to managing a program that is specifically oriented toward integrating the various people, process, and technology issues common to small or large, complex programs. Program management principles and practices are core competencies that are part of our fundamental belief in professional excellence. *Chrysalis Program Management Methodology* (CPMM) is organized into eight key focus areas with defined actions, deliverables, and metrics (as illustrated below). CPMM is a tested collection of our *program management knowledge* used in conjunction with our *government and municipality industry experience* and judgment to execute programs in a manner that achieves client objectives and business benefits. Our approach has been proven repeatedly at previous clients to measure both performance and success during the program's lifecycle.

Chrysalis recommends a PMO structure to support the City's ERP implementation which will serve as the single focal point for integrating all implementation activities, provide cohesive direction for the program, and establish clear lines of communication and accountability. The PMO defines and actively manages the critical path, schedule, and budget, as well as communication both within and outside the program. The PMO also manages the production and distribution of deliverables. CPPM contains tools, techniques, templates, and sample

deliverables for all stages of the program. These program management tools assist in initiating, planning, executing, controlling, and closing each period of the program.

PROGRAM MANAGEMENT OFFICE			
Organization Communication & Change Management	**Program/Project Planning**	**Project Organization**	**Issue & Scope Management**
✓Internal team and external stakeholder communication ✓Business Process impact analysis ✓Stakeholder acceptance	✓Work planning ✓Master schedule ✓Rollout planning ✓Resource requirements	✓Organization structure ✓Roles/Responsibilities ✓New project staff acquisition ✓Staff development ✓Training	✓Issue tracking & mgmt. ✓Scope mgmt. ✓Issue escalation & resolution ✓Change control
Project Status Tracking & Financial Management	**Integration Management**	**Quality Management**	**Risk Management**
✓Work progress & status ✓Deliverables/milestone tracking ✓Project/program financial analysis ✓Project business case realization	✓Functional integration and priority setting ✓Activity and policy integration ✓Process and activity commonality ✓Cross-team integration	✓Program/project standards setting ✓Quality reviews/monitoring	✓Risk Assessment ✓Ongoing risk management & mitigation

The Chrysalis Program Management Methodology incorporates the following phases of ERP implementation:

PHASE	KEY ACTIVITIES AND DELIVERABLES
ANALYZE	• Establishment of Project Management infrastructure (status reporting, issues logs, meeting schedules, etc.) • As-Is Process Analysis • Current/New ERP System Gap Analysis • Cutover Approach • Change Management Plan (stakeholder management, key related projects, communication plan, etc.) • Master Workplan • Development of Project Handbook
DESIGN	• To-Be Process Design • Interface Design • Customization/Modification Design • Report Design

PHASE	KEY ACTIVITIES AND DELIVERABLES
	• System Test Plans • Development of Testing Scripts • Security and Role Mapping • Contingency Plans • Training Plan
BUILD	• Customizations/Modifications • Interfaces and Reports • System Testing/Conference Room Pilot • End User Training Development • Go-Live Cutover Plan • Implementation Phase Detailed Workplan
EXECUTE	• Final System Testing and Acceptance • End User Training • Post Go-Live Support • Finalization of Standard Operating Procedures
STABILIZATION/ BENEFITS REALIZATION	• Tweaking of processes and procedures. • Tweaking of configurations. • Benefits Realization

While by no means a comprehensive list, benefits to the City of Chrysalis' Program Management Methodology include:

Vendor Management. Chrysalis will provide a single point of contact for the City's Project Team for purposes of vendor communication. We will coordinate the activities of individual vendors, facilitate working sessions, resolve issues, and faithfully represent the City to ensure that the City's priorities are addressed.

Risk Management. Chrysalis will document all risks associated with this project and identify corresponding mitigation strategies. These mitigation strategies will be incorporated into all future project planning and documentation activities. Newly-identified risks will be added to the risk assessment as soon as they are identified. Risk levels and mitigation plans will be reviewed during weekly meetings with project sponsors and functional leads.

Issue and Task Management. Proactive management of issues and tasks is essential for completing a project on time and on budget. Each task and issue will be assigned a priority and an owner. The progress of these Items will be reviewed and reported on monthly, weekly or daily basis depending on their priority and current status.

<u>Project Team Facilitation</u>

Chrysalis will facilitate meetings of the City's Project Team. We will ensure that tasks are identified and tracked, milestone dates are clearly communicated, issues are identified and resolved, and the project remains on schedule.

<u>Documentation</u>

Chrysalis will provide robust and usable technical, user, and turnover documentation. This documentation will have a process focus for maximum usability.

<u>Quality Assurance</u>. Perhaps most critical, Chrysalis will work to identify issues and risks before they have opportunity to derail the effort. We will ensure that vendor deliverables are of acceptable quality, and that all vendor commitments are honored.

Critical Success Factors

Should the City, based upon the findings generated by the Assessment, opt to move forward with a software selection and implementation effort, we recommend that the following factors be considered critical to the success of the effort:

1. Establish Strong Project Leadership
2. Consider Unique Organizational Needs
3. Foster Communication and Collaboration
4. Proactively Manage Issues and Tasks
5. Identify Risks and Mitigation Strategies
6. Establish Realistic and Measurable Goals
7. Ensure Adequate Training
8. Allow Opportunity to Realize Benefits
9. Manage Change

Should Chrysalis be asked by the City to provide selection and implementation services, our team will assist the City in maximizing the opportunity for success by applying these principles. These principles are described in detail below:

Establish Strong Project Leadership

Support and involvement of the City's Project Manager and identified functional area leads is critical to the success of the project. Individuals responsible for overseeing key operational areas will comprise a Leadership Team. The Leadership Team will be responsible for:

- ◊ Promoting the project throughout the City;
- ◊ Providing guidance to functional team members, and
- ◊ Assisting with issue resolution as needed.

Consider Unique Organizational Needs

Failure to consider the unique needs of an individual organization can result in severe inefficiencies in processes and procedures associated with a newly deployed system. A clear understanding of organizational drivers and needs will combine with our knowledge of public sector best practices to assist in the development of processes and procedures that are best suited for the City.

Foster Communication and Collaboration

This effort for the City will succeed only with the uncompromised cooperation of all key staff and stakeholders. In the context of this business process modeling initiative, staff members may find their roles and activities scrutinized as never before. It is not uncommon for this scrutiny to breed anxiety, which can lead to guarding of critical information. Our strategy is rooted in a simple philosophy of *engagement*. We employ our "Chrysalis Sneakernet" to ensure that:

◇ Employees (and other stakeholders) have the opportunity to be heard;
◇ Employees are given every opportunity to succeed;
◇ Employees feel connected to the effort;
◇ Employees feel safe asking questions, making recommendations, and learning by doing.

Keys to our success in past efforts have included:

◇ *Being visible, approachable, and personable;*
◇ *Acting as liaison between employees and project leadership;*
◇ *Understanding threats and allaying fears;*
◇ *Identifying the de facto leaders (not necessarily supervisors or managers) within the organization and recruiting them to act as change agents;*
◇ *Promoting the philosophy among all stakeholders that "we all succeed or fail together;"*
◇ *Acknowledging and celebrating interim milestones and achievements;*
◇ *Engaging in active listening and solicitation of ideas from all levels; and*
◇ *Being honest.*

Chrysalis employs its proprietary *Inform-Solicit-Engage* methodology to manage communications. Our methodology defines communication needs as falling into three basic categories, as shown below:

Inform	**Solicit**	**Engage**
• One-way communication • Audience to be informed of project activities	• One-way communication • Audience to provide input to project	• Two-way communication • Audience to be actively involved in project activities

In brief:

◇ The *Inform* model is used for disseminating information;
◇ The *Solicit* model is used for gathering information; and
◇ The *Engage* model is used for collaborative interactions.

It should be noted that individual audiences ("stakeholders") may fall into one, two, or even all three categories at various points in the project. For example, maintenance staff who are not part of the functional team may only need to be informed during the early phases of the effort, but will need to be engaged when it comes time for testing, training, and deployment. Conversely, executive sponsors may need to be solicited for their priorities and objectives vis à vis the implementation, but may only need to be kept informed as the project progresses.

This model allows for the efficient sharing or collection of information without potential distractions or oversights that can plague large organizations. Targeted communications by stakeholder group will be scheduled to coincide with activities relevant to their areas of responsibility. The frequency of general and targeted communications will be influenced by milestones, upcoming phase news, or implementation activity. For most projects, these communication activities accelerate to weekly or daily updates as go-live or key integration points approach.

Proactively Manage Issues and Tasks
Proactive management of issues and tasks is essential for completing a project on time and on budget. Each task and issue will be assigned a priority and an owner. Tasks and issues not identified in the master project plan will be tracked on a separate task list. The progress of these Items will be reviewed and reported on monthly, weekly or daily basis depending on their priority and current status.

Identify Risks and Mitigation Strategies
Risk management is a critical component in all projects. Failure to identify and address general and project-specific risks can result in the failure of a project. Chrysalis will conduct a project risk assessment to determine the potential risks to the organization associated with a software

implementation project of this magnitude. Risks common to projects such as this include, but may not be limited to, the following:

◇ Disruption of business activities
◇ Data loss
◇ Security breach
◇ Lack of employee acceptance
◇ System does not meet requirements
◇ Loss of key personnel

Chrysalis will document all risks associated with this project and identify corresponding mitigation strategies. These mitigation strategies will be incorporated into all future project planning and documentation activities.   Newly-identified risks will be added to the risk assessment as soon as they are identified. Risk levels and mitigation plans will be reviewed during weekly meetings with project sponsors and functional leads. By applying the principles of risk management (shown below), we will greatly maximize the implementation's opportunity for success.
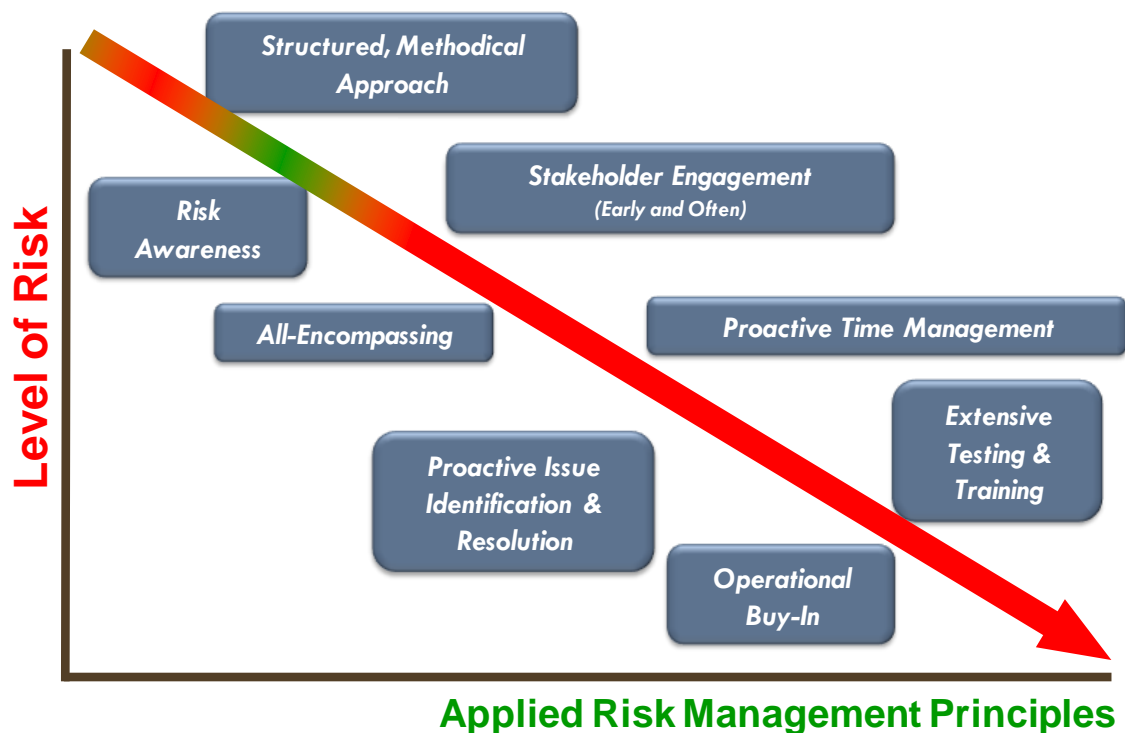
Establish Realistic and Measurable Goals

During the course of an implementation effort, the organization must make decisions, and in some cases, compromises. A lack of clearly-defined goals and objectives for the effort can lead to sub-optimal decisionmaking, working at cross-purposes, and confusion and strife among Project Team members. Further, a successful go-live may end up seeming like a failure because certain "nice-to-haves" were not realized; or, conversely, a seemingly successful implementation may not have achieved the goals for which the implementation was originally justified.

Chrysalis will assist the City management in obtaining the buy-in of key project and staff members for the proposed future state of processes and technology for the City. This buy-in is crucial to the success of the software selection effort and the resulting implementation. Chrysalis will facilitate the Project Team in achieving consensus regarding the goals of this effort. What are we trying to achieve? What is included in the scope of this effort? How will we measure success? Discussing, agreeing upon, and documenting the answers to these questions at project outset will serve to guide subsequent activities and decisions, and focus staff upon a shared goal.

Here are some examples of specific, prioritized, and measurable objectives:

Priority 1: Complete project within allotted budget.

Priority 2: Provide access and training to allow report configuration and execution capability to all end users.

Priority 3: Achieve complete automation of Procure-to-Pay cycle.

Priority 4: Eliminate all existing "shadow systems" in Finance area.

Priority 5: Reduce required monthly manual journal entries by 50%.

Priority 6: Achieve integration between core financials, utility billing, and project tracking.

Using the above prioritized list as a guide, consider the following example: the City has identified certain functionality gaps to be bridged, but some solutions will require significant additional investment. The above list places a higher priority on maintaining the budget than upon achieving all functionality objectives.

A prioritized list of goals for the implementation will guide decisionmaking and keep all team members focused upon a common set of objectives.

Ensure Adequate Training

A common theme in suboptimal ERP implementations is that end users are ill-prepared to perform their job functions in the new system environment. Often, inadequate training is the result of one or more of the following factors:

◇ Inadequate budget is allocated to training activities;
◇ Inadequate time is reserved for training activities;
◇ Training time commitment not supported by upper management;
◇ Training materials are "off-the-shelf" and do not reflect the operations of the client business;
◇ Training is viewed as a last step, rather than as a continuous and progressive effort.

Chrysalis will assist the City in devising a project plan and project budget which allows ample time and resources to be dedicated to training. Further, Chrysalis will help the City identify accommodations which should be made to facilitate training attendance. For example, will temporary staff be necessary to support ongoing operations during peak project time? Will overtime pay be approved?

Chrysalis will also devise a training plan that is multi-faceted, appeals to a wide range of learning styles, and incorporates the following elements:

TYPE OF TRAINING	AUDIENCE	DESCRIPTION
Business Configuration Workshop	Project Team	Review of basic business capabilities and parameters associated with the system. The outcome will be an understanding of system capabilities and how the system will be configured.
Data Configuration Workshop	Project Team	Review of key static data elements and how they are used in the system. The outcome will be an understanding of the static data and how it works in the system.
Process Workshop	Project Team	Preview of system with the City configurations and sample data sets. Outcome will be a general understanding of the system and how it will support their processes.
General Practice and Training	Project Team	The City's Project Team works one-on-one with consultants to further define processes and learn the system. The City's Project Team will be tasked with writing test scripts and scenarios.
Proof of Concept	Project Team	Modular proof of concept based on the information discovered above.

TYPE OF TRAINING	AUDIENCE	DESCRIPTION
General Practice and Training	Project Team	Consultants continue to work with the City's Project Team to learn the system. Recommend dedicated practice session for core users.
Conference Room Pilot #1	Project Team	Modular conference room pilot with full data sets.
Conference Room Pilot #2	Project Team	Integrated conference room pilot with full data sets.
User Acceptance Testing	End Users	Bring in selected end users to test system.
End User Training	End Users	Classroom-based, instructor-led, completely hands-on training by functional area.
Remediation Training	End Users	Remediation training generally takes place 2-6 months following go-live, and its purpose is to offer enhanced and/or refresher training. The theory is, once users have developed a comfort level in the new environment, they are more able to absorb additional knowledge, or "take it to the next level." This is also a good forum for addressing problems that have arisen, before the workarounds become institutionalized.

Allow Opportunity to Realize Benefits

While it is tempting to view a large-scale implementation such as this as a finite initiative with a defined beginning and end, the truth is that **the real work of *benefits realization* begins after go-live**. The City should measure the success of this ERP implementation not merely by achieving uninterrupted interruptions at cutover (although this is important), but by the benefits and efficiencies gained over the 12-24 months following go-live.

We will assist the City with the realization of the benefits that were outlined at project commencement (and presumably used as cost justification for the effort). We will do this by establishing a framework for the City in which to engage in cross-functional discussion, opportunity identification, and issue resolution beyond go-live.

Manage Change

Chrysalis understands that the true challenge facing the City is not merely technological, but **transformational**. The cultural change associated with the implementation of new processes, changed controls, and enabling technologies is enormous, and the success of these efforts depends upon the application of rigorous change management techniques.

When implementing significant technology changes, Chrysalis consultants have observed that the most successful organizations understand that business processes must change

substantially to make the best use of the new capabilities, and begin managing the change process from the beginning of the project. Early engagement in strategy and decision-making improves acceptance and participation in both implementation and use. Likewise, the governance processes for review and adoption of technology must be simple, accessible, and consistent, or they will be met with resistance or avoided entirely.

By managing the change process **from the beginning of the project**, key considerations can be addressed:

◇ What is the current technology culture?
◇ What role do systems and technologies play in the interaction of the organization and the attitudes toward these tools?
◇ What changes are most likely to happen?
◇ What can we do now to minimize disruptions of change?
◇ What changes are more valuable than others?
◇ What are the barriers to change and what can we do about them now?
◇ How do we best prepare our people for expected changes?
◇ How do we best communicate what is and is not happening, and prevent misinformation of what is and is not happening?
◇ What are staff's biggest worries and how can we address them?

We also recognize that there is an emotional element associated with change which is very real. If this human side of change is not properly managed and your employees, customers, and suppliers do not embrace the change, it can jeopardize the success of even the most carefully crafted efforts. In the absence of managing change in a formal manner early in the project, the organization will develop informal ways of developing expectations and preparing for change that will likely result in sub-optimal project results, as illustrated below.

Change Management
Perceptions of Change over Time
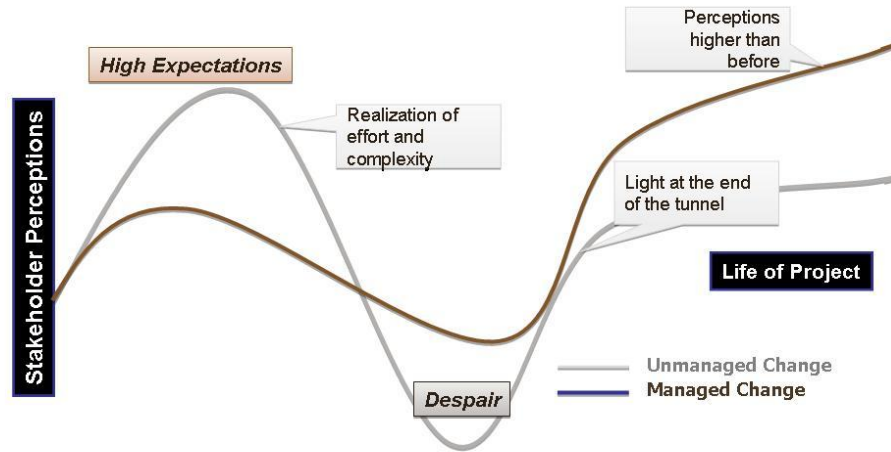
Chrysalis will combine deep technology and process expertise with a comprehensive understanding of the human side of change to ensure the success of this effort for the City. Chrysalis consultants are keenly aware and sensitive to the capacity and readiness for change within a client's organization. We will identify constraints for change and help the City overcome or accommodate those constraints so that the change process is well managed and disruptions are minimized.

Project Schedule

There are many factors that will impact project timing for the City, including availability of key resources, political, organizational, and procurement processes, among others. The following page contains estimated timing based upon our work on similar efforts:

Estimated Timing: Needs Assessment through Contract Negotiation

ACTIVITY/WEEK	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
Needs Assessment	■	■	■																							
Structure/Setup		■	■																							
RFP Development			■	■	■	■	■																			
Bid on Street								■	■	■	■	■	■													
Proposal evaluation														■	■	■	■	■	■	■	■					
Contract negotiations																						■	■	■	■	■

<u>Estimated Timing: Installation and Implementation</u>

Chrysalis estimates a 12- to 18-month timeline for implementation of the newly-selected system(s). It is important to note, however, that there are many factors which will influence the implementation timeline, and we would encourage the City to remain flexible as more information is available regarding the adopted solution.

3. PRICE PROPOSAL

Proposed Fees

Chrysalis proposes to provide the services described herein on a time-and-materials basis for an estimated $98,630 (plus travel and related expenses) for Needs Assessment through Contract Negotiation. We estimate fees for Implementation in the range of $295,000 to $439,000, depending upon selected software and resulting project timeline and phasing. The City's Price Proposal Response Form is included in Appendix A.

Expenses

Reimbursable expenses, such as mileage, car rental, lodging, and telephone are billed at cost and in accordance with the City's expense reimbursement policies. The City shall not be billed for time spent traveling. Chrysalis will work closely with the City to establish a budget and manage expenses. Chrysalis makes every effort to minimize expenses associated with travel.

Assumptions

Chrysalis has prepared this estimate under the following assumptions:

◇ All process documentation that currently exists for the City will be made available to Chrysalis in support of the project;

◇ All system architecture and other technical documentation that currently exists will be made available to Chrysalis in support of the project;

◇ City staff will make themselves reasonably available during appropriate portions of this effort; and

◇ Pricing herein assumes an uninterrupted project timeline. Extraordinary delays may result in adjustments to rate and/or assigned personnel.

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4. QUALIFICATIONS

Brief Description of the Firm

Chrysalis is an Indiana-based, limited liability company. Established in 1998, Chrysalis provides general management and technology consulting services for clients throughout the United States. For eighteen years, Chrysalis consultants have provided excellent service within the public sector in the following key practice areas:

◊ *Technology Needs Assessment*
◊ *Request for Proposal Development*
◊ *Software/Vendor Selection*
◊ *Procurement and Negotiation Support*
◊ *Software Implementation*
◊ *Process Redesign and Performance Management*
◊ *Change and Transition Management*
◊ *Project Management*
◊ *Training Design, Development, and Delivery*
◊ *IT Strategy*

Chrysalis consultants have assisted governmental entities in system selection and implementation, business process design and optimization, IT strategy development, and transition planning and management. Chrysalis consultants are educated in public sector best practices and have the ability to adapt them to a variety of environments. Chrysalis is a certified **Woman-Owned Business Enterprise** and **Disadvantaged Business Enterprise**.

Why Chrysalis?

Here are just a few of the reasons our clients choose Chrysalis.

Our Expertise

Chrysalis possesses the depth of experience the City is seeking. We are confident in our ability to provide value to the City, owing to our depth of experience and focus upon business process improvement, technology and needs assessment, ERP selection and implementation, program and project management, training, and change management. Each of these services is described in more detail below:

ERP Assessment, Selection and Implementation

Chrysalis' consultants have extensive experience in the assessment of business processes and supporting technologies, as well as the application of change management techniques in support of large-scale transformation projects. We have provided system selection, ERP implementation, training, and organizational change services to a number of clients across many industries, and in particular, for public sector. Chrysalis consultants possess an in-depth

knowledge of enterprise applications and maintain a current understanding of the available tools within the marketplace. The professionals at Chrysalis have had first-hand exposure to all of the major players in the ERP space.

Program/Project Management

Chrysalis provides clients comprehensive and robust program and project management services. Our firm assists clients in maximizing the return on their most important projects and recognizes the importance of meeting project budget, timeline, and performance improvement targets. Chrysalis understands that for a project to succeed, it must first clear the hurdle of demonstrating its value to the business as a whole. We assist clients in the quantification of both financial and non-financial elements to arrive at a sober assessment of the potential value of any initiative. In so doing, we employ a rigorous methodology designed to transform qualitative assessments of risk and return into measurable outcomes. We then provide hands-on implementation of recommended initiatives, all the while ensuring that the resulting change effort is skillfully managed.

Business Process Optimization

Chrysalis' approach to Business Process Optimization incorporates our philosophy that for an organization to function at peak capacity, consideration must be given not only to business processes, but also to supporting technologies and the organization itself. These three components work in concert and should not be viewed independently. Chrysalis provides assistance in the analysis, redesign, and improvement of business processes. Starting with an existing process description or a "blank sheet," Chrysalis leverages its deep experience to identify and implement recommendations that result in measurable, significant, and sustainable improvements. Particular attention is placed on the integration of IT systems and business processes. Here are a few of the successes achieved by Chrysalis' consultants:

> **Cost Accounting System Redesign.** Assisted a $120M plastics manufacturer in the redesign of their cost accounting system. Assessed the effectiveness of the existing system in the current business environment. Developed an activity-based system and prepared a long-range plan for implementation. The improved system motivated a product rationalization which **reduced the number of products by 20%, significantly reducing operating costs**.

> **Automotive BPR.** Performed business process reengineering for a $900M supplier of automotive body panels and frames. Conducted extensive customer interviews to determine requirements for quotation process. Recommended substantial improvements to the quotation process, affecting one third of entire organization. New process drove reduction in quotation process turnaround from 80 days to 30 days.

Non-Profit Organizational Review. Conducted an operations review of a non-profit educational organization. Constructed a business financial model and interviewed key personnel to identify opportunities for operational improvement. Trained team members in project management techniques. Served as advisor to internal reengineering task force. The resultant 35% decrease in operating costs allowed the organization to achieve financial independence while preserving its high level of quality.

Reengineering and Reorganization. Performed division-wide reengineering of an underperforming division of a Fortune 250 firm. Major activities included: defining and mapping core business processes; benchmarking against major competitors and industry best practices; developing and implementing improved processes; and managing change within the organization. The project culminated in the **selection and implementation of a new business system**; a **reduction from four to two major production locations**; the **elimination of non-value-added administrative functions**; and a **reorganization based on processes rather than functions**.

Reengineered product development process for a major automotive electronics parts manufacturer. Conducted diagnostic interviews and performed a detailed case study of a specific project to identify limitations of existing process. Developed high-level process map incorporating new vision to **reduce cycle time from 15-36 to 8 months**.

Training

At Chrysalis, we understand that the success of any large initiative depends heavily upon human factors. While it is tempting to view training as a "nice-to-have" and a coordinated communications effort as an unnecessary burden, the fact is, inadequate training can lead to disastrous results for an otherwise well-managed project.

Chrysalis delivers robust and customized training programs. For each and every training effort, we utilize techniques which enhance student retention by appealing to a variety of learning styles. We address user knowledge needs before, during, and after training, and ensure that results are achieved and sustained. Chrysalis draws upon a wealth of experience to customize and deliver software, business process, and presenting skills training to its clients. Chrysalis has consistently received high marks for training quality.

Change Management

At Chrysalis, we employ a thorough approach designed to uncover obstacles to improvement and define workable solutions, ensuring that no detail is overlooked. We use our proprietary Change Management methodology and tools to develop a robust plan which addresses all aspects of the proposed change, including staffing, training, technology, processes, and other considerations necessary for success.

Our Public Sector Expertise

Chrysalis understands the specialized operations and protocols of the public sector. We understand the external requirements imposed by policy or in service to the public and the intricacies of contract requirements. Whether we're handling Sensitive Security Information or navigating government procurement and contract processes, we have the knowledge and experience to get the job done.

Chrysalis addresses the unique stakeholder challenges of the public sector with ideas and techniques that have been successful in both the private and public sectors. We emphasize change management to successfully educate, train, inform, and transition government clients to the new practices. Chrysalis identifies constraints for change and helps the client overcome or accommodate those constraints so that the change process is well managed and disruptions are minimized.

Chrysalis is successful at promptly becoming familiar and remaining in compliance with various statutory requirements and codes for public sector clients. Following are current and recent public sector clients served by Chrysalis for more than 10 years:

- *Greenville County, SC*
- *City of Medford, OR*
- *The Housing Authority of the City of Los Angeles*
- *Indiana Department of Correction*
- *Indiana Department of Education*
- *Indiana Department of Homeland Security*
- *Indiana State Department of Health*
- *Indiana Horse Racing Commission*
- *Indiana Family and Social Services Administration*

- *North Central Indiana Economic Development Partnership*
- *Indiana State Auditor*
- *Indianapolis Airport Authority*
- *Louisville Regional Airport Authority*
- *Metropolitan Nashville Airport Authority*
- *Kenton County Airport Board*
- *Kalamazoo County*
- *Wichita Airport Authority*

Our Independence

Chrysalis is not currently, nor has it ever been, aligned with any provider of software or development services. Our consultants have broad expertise with many systems which support a variety of public sector processes, and will bring this breadth to bear when assisting the City with this effort. We believe that this independence provides value to our clients, in that we are uniquely suited to provide unbiased assessments of the relative strengths and weaknesses of enabling technologies.

Our Responsiveness

As a small consulting firm, Chrysalis appreciates the significance of each client we serve. Chrysalis is dedicated to "doing what it takes" to complete client projects on time and within budget in order to maximize convenience, benefit, and return on investment for our clients. Our size enables us to be acutely responsive, and the City can be assured that they will receive the full and uncompromised attention of all team members, as well as hands-on, active engagement from executive management.

Our Proven Success

Our clients tell us that we have distinguished ourselves from our competition by our ability to facilitate and coordinate contributions from many participants, align and gain buy-in from diverse stakeholders, anticipate and mitigate problems, and by making client satisfaction and success our top priority.

APPENDIX A: RESPONSE FORMS AND OTHER DOCUMENTS

The following documents are included on the following pages.

- ◇ Proposal Response Form — Signature Page
- ◇ Response Form — Price Proposal
- ◇ Response Form — Experience
- ◇ Response Form — Proposed City of Gainesville Team
- ◇ Response Form — Reference Listing
- ◇ Addendum 1
- ◇ Addendum 2

PROPOSAL RESPONSE FORM – SIGNATURE PAGE
(submit this form with your proposal)

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

PROJECT: **Enterprise Resource Planning (ERP) Consulting Services**

RFP/RFQ#: **FADM-170007-DH**

RFP/RFQ DUE DATE: **September 22, 2016**

Proposer's Legal Name: **Chrysalis Consulting, LLC**

Proposer's Alias/DBA: **Chrysalis Government Solutions**

Proposer's Address: **11711 N. Meridian Street, Suite 525**

                        Carmel, Indiana 46032

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)
        Name: **Janette Phillips**   Telephone Number **248-202-1180**

        Date: **September 22, 2016**   Fax Number **317-844-1407**

                                      Email address **jphillips@chrysalisglobal.com**

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s **1 and 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 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

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.

                                         (CORPORATE SEAL)
ATTEST: PROPOSER:

_____   _____
Signature   Signature
By:_____   By:_ Janette Phillips_____

Title:_____   Title:_Director, Business Development_____

Response Form – Price Proposal
(to be completed by all Respondents).

Please provide the following information in the table below. Estimated dollars, man hours, and duration in months may be provided in ranges. The methodology and approach on each of the ERP Consulting Services one through six, must be included under the Price Proposal Response Form and should not exceed five pages.

	Enterprise Resource Planning Consulting Services	**Estimated Professional Services**	**Estimated Travel and Expenses**	**Estimated Man Hours**	**Estimated Duration (Months)**	**Typical Billing Approach** Fixed Fee, Time and Expenses, etc.
1	**Needs Assessment** Assessment of City's processes, technology, and organization. Cost/benefit analysis for introduction of new technologies. Recommendations for going-forward strategy (stay put, upgrade, migrate, etc.) Introduction of change management considerations.	$35,270	$5,735	228	1 month	Time and Material
2	**Assistance With Structure/Setup of Internal Project Management Team** Advise regarding establishment of leadership and project team, project structure, timelines, and other PMO considerations; stakeholder analysis and communication plan.	$7,800	$1,175	48	<1 month	Time and Material
3	**Development of Enterprise Resource Planning RFP** Develop functional and technical requirements, identify knockout criteria, identify and prequalify vendors, draft/finalize RFP, prepare proposal scorecard.	$10,460	$2,350	196	2-3 months	Time and Material
4	**Assistance in ERP Proposal Submission/Evaluation Process** Conduct pre-bid session, answer vendor questions, prepare vendor demo scripts, review and score proposals, conduct vendor demos, prepare 5-year cost projection, facilitate final selection.	$36,100	$4,700	180	2-3 months	Time and Material
5	**Assistance with ERP Vendor Contract Negotiations** Act as City's advocate for purposes of defining vendor scope, compensation, terms, and key performance measures.	$9,000	$0	54	1-2 months	Time and Material
6	**Assistance in Implementation** Provide comprehensive project, vendor, and change management services through go-live and beyond.	$295,000 - $439,000	$47,000 - $70,000	1840 - 2740	12-18 months	Time and Material

Company Name: __Chrysalis Government Solutions_____

Authorized Signature & Title: _____

Print/type Name as Signed Above: __Janette Phillips_____Date: __9_/_22___/_16__

Response Form – Experience
(to be completed by all Respondents).

Please provide a list of local government entities that you have assisted (up to ten). Identify the ERP software migrated to, the approximate completion date, the types of consulting services provided and client contact information. Also identify your lead consultant(s) on the engagement. Please use the table below to provide the requested information.

	Local Government Entity and Contact Information	ERP Software Solution Migrated To	Completion Date	Type of Consulting Services Provided	Lead Consultant(s)
1.	**City of Medford, Oregon** Alison Chan, Finance Director 541-774-2030 Alison.chan@cityofmedford.org	Sungard	January 2016	Business Process Modeling, Requirements Definition, RFP Development	Kelly Weersing, Ann Thorvik
2.	**County of Greenville, South Carolina** Angela Roache, Director of Financial Operations 864.467.7026 aroache@greenvillecounty.org	Tyler Technologies	July 2015	Needs Assessment, Requirements Definition, Technology Roadmap, Stakeholder Analysis and Communications Plan	Ann Thorvik
3.	**The Housing Authority of the City of Los Angeles** Luis Yataco, Information Technology Officer 213-252-3115 Luis.yataco@hacla.org	Oracle EBS	May 2014	Assessment, Business Process Improvement, Vendor Selection, Change Management	Suzanne Phelps
4.	**Metropolitan Nashville Airport Authority** Vanessa J. Hickman, Vice President and Chief Administrative Officer 615.275.2012 Vanessa_hickman@nashintl.com	MS Dynamics	July 2014	ERP Selection, Program Management, Change Management	Kelly Weersing

	Local Government Entity and Contact Information	ERP Software Solution Migrated To	Completion Date	Type of Consulting Services Provided	Lead Consultant(s)
5.	**Louisville Regional Airport Authority** Dodie Caulk, Controller Telephone: 502-368-6524 Email: dodiec@iflylouisville.com	Oracle EBS	September 2010	Needs Assessment, ERP Selection, Program Management, Change Management, Data Conversion, and Process and Training Documentation	Kelly Weersing
6.	**Indiana Dept. of Correction** Aaron Garner, Executive Director, Research and Technology 317.232.1757 agarner@idoc.in.gov	Capita	November 2011	Needs Assessment, RFP Development, System Selection, Contract Negotiation	Kelly Weersing
7.	**Kenton County Aeronautics Board** Tim Zeis, Chief Operating Officer 859-767-3158 tzeis@cvgairport.com	Oracle E-Business Suite; Infor EAMS	July 2016	System Implementation, Change Management	Patrick Garner
8.	**Indianapolis Airport Authority** Reid Goldsmith, Director of IT 317-489-7792 rgoldsmith@indianapolisairport.com	Oracle EBS	October 2014	ERP Assessment, RFP Development, System Implementation, Training, Process Documentation	Ann Thorvik, Patrick Garner
9.	**Indiana Family and Social Services Administration** Ron Hendrickson, IT Project Manager Senior 317-233-5711 Ron.hendrickson@fssa.in.gov	N/A	June 2016	Needs Assessment and RFP Development for Hosting and Support Services	Kelly Weersing

Company Name: Chrysalis Government Solutions

Authorized Signature & Title:

Print/type Name as Signed Above: Janette Phillips   Date: September 22, 2016

**Response Form – Proposed City of Gainesville Team
(to be completed by all Respondents)**

Identify the consulting team that is proposed for the City of Gainesville engagement and the office location from which the work will be done. Identify similar assignments completed by the proposed consultants and provide their responsibilities on the previous engagements.

Chrysalis has identified **Ann Thorvik** as the Project Manager for this effort. **Kelly Weersing** will be the City's Engagement Manager, and **Sheldon Phelps** will lend specific expertise in business case development and contract negotiation.

Ann Thorvik, Project Manager
Ms. Thorvik's strengths reside within the areas of process analysis, operational improvement, needs assessment and requirements definition, stakeholder engagement, and change management. Ms. Thorvik is particularly skilled at communicating with staff at all levels within an organization, and this has earned her special commendation on past projects. Ms. Thorvik also has recent and relevant experience in requirements definition, RFP development, and system selection.

The work required for the City of Gainesville encompasses the entire life cycle of an ERP process. Ann will lead your team through the complex and detailed process in a way that is straightforward and manageable for your staff. Ann will bring to bear the following skills and attributes which are of value to the City for this effort:

◇ *Outstanding analytical, documentation, and organizational skills;*
◇ *Recent and applicable experience in selection of enabling technologies for public sector;*
◇ *Demonstrated success in managing change associated with large and complex implementations;*
◇ *A unique ability to motivate, drive consensus, and foster goodwill across functional areas;*
◇ *Deep background in operational improvement and process optimization; and*
◇ *Proven success in process change and technology efforts.*

Ms. Thorvik has served as project manager for similar engagements, as shown in the table below:

CLIENT	PROJECT	ROLE
Greenville County	Business Process Modeling, Requirements Definition, System Selection	Project Manager and Lead Functional Consultant
City of Medford	Business Process Modeling, Requirements Definition, System Selection, Project Management of System Implementation	Project Manager and Lead Functional Consultant
Stratosphere Quality	Field Time and Data Entry Business Process Assessment, Requirements Definition, Build vs Buy Analysis, Selection, and Implementation	Project Manager and Lead Functional Consultant
Indianapolis Airport Authority	ERP Assessment	Project Manager and Lead Functional Consultant

Kelly Weersing, Engagement Manager
Chrysalis has identified Ms. Kelly Weersing as the Engagement Manager for this effort. As Director of Chrysalis' ERP practice, she has provided ERP-related services several public sector clients. She has performed the full lifecycle process for ERP engagements, from needs assessments through to implementation and user satisfaction after cutover. Kelly has a successful record of leading teams and ensuring quality throughout all phases of complex efforts. Kelly will bring to bear specific expertise in the following areas of interest to the City:

◇ *Over twenty years' experience in business process redesign and optimization, with particular expertise in the integration of new technologies in support of enhanced processes;*

◇ *Extensive selection and implementation experience across multiple industries;*

◇ *Extensive and current knowledge of technologies currently deployed within public sector environments;*

◇ *A successful record of leading teams and contributing to the development of high quality products; and*

◇ *An ability to lead teams and ensure quality throughout all phases of complex efforts.*

Kelly's recent ERP experience is shown in the table below:

CLIENT	PROJECT	ROLE
Metropolitan Nashville Airport Authority	ERP Selection, Program Management, Change Management	Engagement and Project Manager
City of Medford	Business Process Modeling, Requirements Definition, System Selection, Project Management of System Implementation	Engagement Manager
Indiana Family and Social Services Administration	Needs Assessment and RFP Development for Hosting and Support Services	Engagement and Project Manager
Indiana Department of Correction	Needs Assessment, RFP Development, System Selection, Contract Negotiation	Engagement and Project Manager

Sheldon Phelps, Business Case Development and Contract Negotiation
Mr. Phelps has extensive experience in the drafting, review, and negotiation of IT and service-related contracts. Mr. Phelps will be assisting the City with contract negotiations with the selected vendor(s). Mr. Phelps has served clients within the public sector, as well as the manufacturing, healthcare, utilities, technology and real estate industries. He has led projects in a wide range of areas, including System Selection and Implementation, Strategic Plan Development, Marketing Strategy and Planning, Business Process Reengineering, and Activity-Based Costing. Mr. Phelps' prior business experience includes Deloitte & Touche Consulting Group, Ford Motor Company, General Motors Corporation, and Masco Corporation.

Mr. Phelps holds a Bachelor of Science degree in Mechanical Engineering from the Massachusetts Institute of Technology and a Master of Business Administration (with Distinction) from the University of Michigan. In summary, Mr. Phelps has:

◇ *More than 25 years of broad general management consulting experience at Chrysalis Consulting and Deloitte Consulting;*

◇ *Deep expertise in the areas of business case development, supplier management, and contract negotiation;*

◇ *Significant public sector experience;*

◇ *Served clients ranging from startups to multiple Fortune 10 corporations;*

◇ *Led a number of clients in software system selection and implementation; and*

◇ *Negotiated hardware and software purchase and support contracts valued at over $100 million.*

Sheldon's recent and applicable experience includes:

CLIENT	PROJECT	ROLE
Indiana Department of Correction	Needs Assessment, RFP Development, System Selection, Contract Negotiation	Contract Negotiation and Business Case Development

CLIENT	PROJECT	ROLE
Indianapolis Airport Authority	ERP Replacement Feasibility Study	TCO Analysis
Louisville Regional Airport Authority	Business Process Modeling, Requirements Definition, System Selection, Project Management of System Implementation	Contract Negotiation
Allison Transmission	IT Outsourcing	RFP Development, Contract Negotiation and Implementation

Company Name: <u>Chrysalis Government Solutions</u>

Authorized Signature & Title: _____

Print/type Name as Signed Above: <u>Janette Phillips</u>   Date: <u>9/22/16</u>

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: County of Greenville, South Carolina
   ADDRESS: 301 University Ridge, Suite 200
            Greenville, South Carolina 29601
   TELEPHONE: (864) 467-7026   Email:aroache@greenvillecounty.org
   CONTACT NAME: Angela Roache
   DATE OF COMPLETION OF PROJECT: July 2015
   CONTRACT AMOUNT:$ 94,000

2. CUSTOMER NAME: Metropolitan Nashville Airport Authority
   ADDRESS: One Terminal Drive, Suite 501
            Nashville, Tennessee 37214
   TELEPHONE: (615)275-2012   Email: vanessa.hickman@nashintl.com
   CONTACT NAME: Vanessa Hickman
   DATE OF COMPLETION OF PROJECT: July 2014 (Some ongoing phased work)
   CONTRACT AMOUNT:$ 400,000

3. CUSTOMER NAME: City of Medford, Oregon
   ADDRESS: 411 West 8th Street, Suite 380
            Medford, Oregon 97501
   TELEPHONE: (574) 774-2030   Email: alison.chan@cityofmedford.org
   CONTACT NAME: Alison Chan
   DATE OF COMPLETION OF PROJECT: January 2016
   CONTRACT AMOUNT:$ 113,800

4. CUSTOMER NAME: The Housing Authority of the City of Los Angeles
   ADDRESS: 2600 Wilshire Blvd
            Los Angeles, California 90057
   TELEPHONE: (213) 252-3115   Email: luis.yataco@hacla.org
   CONTACT NAME: Luis Yataco
   DATE OF COMPLETION OF PROJECT: May 2014
   CONTRACT AMOUNT:$ 660,000

5. CUSTOMER NAME: Indianapolis Airport Authority
   ADDRESS: 7800 Col. H. Weir Cook Memorial Drive
            Indianapolis, Indiana 46241
   TELEPHONE: (317) 489-7792   Email: rgoldsmith@indianapolisairport.com
   CONTACT NAME: Reid Goldsmith
   DATE OF COMPLETION OF PROJECT: October 2014
   CONTRACT AMOUNT:$ 100,000

My company has been in this type of business for **18** years.

ADDENDUM NO. 1

Date: August 31, 2016   Bid Date: September 22, 2016
                                                                                       at 3:00 P.M. (Local Time)

RFP Name: Enterprise Resource Planning (ERP) Consulting Services   Bid No.:   FADM-170007-DH

NOTE: This Addendum has been issued only to the holders of record of the specifications.

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 3:00 p.m. (local time), September 15, 2016. Questions may be submitted as follows:
                            Email: holderds@cityofgainesville.org
                            or
                            Faxed (352) 334-3163
                            Attention: Diane Holder

2.   Please find attached:

a) Copy of the black-out period information (Financial Procedures Manual Section 41-424 Prohibition of lobbying in procurement matters)) distributed during mandatory pre-bid meeting.

3.   D. NON-MANDATORY PRE-PROPOSAL CONFERENCE
            Please add the following:

A teleconference option is available to interested participants as follows:
            Conference Participant:
            1. At the specified time, dial the Dial-in Number 844-809-3799
            2. When prompted, enter your Conference Code.
            3. Your Conference Code is 5576566553

            Participant Star Commands
            4. Mute – Participants can mute/unmute their own lines by pressing *6

The following are answers/clarifications to questions received prior to the non-mandatory pre-bid conference:

4. Question: For the pre-proposal conference scheduled for September 8th, will there be a dial-in option?
    Answer: See #3 above.

5. Question: The PDF I have doesn't have any requirements to fill out in regards to functionality. Is there another attachment?

   Answer: The only attachments required are included in the original RFP document. At this point, the City is looking for ERP consulting services to assist us in the procurement and implementation of an ERP system. Please refer to Section II- Scope of Services, A. Intent for the scope of this project.

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: Chrysalis Government Solutions

BY:

DATE: September 22, 2016

CITY OF   FINANCIAL SERVICES
GAINESVILLE   PROCEDURES MANUAL

41-424   **Prohibition of lobbying in procurement matters**

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

ADDENDUM NO. 2

Date: September 14, 2016   Bid Date: September 22, 2016
                                                                                at 3:00 P.M. (Local Time)

RFP Name: Enterprise Resource Planning (ERP) Consulting Services   Bid No.:   FADM-170007-DH

NOTE: This Addendum has been issued only to the holders of record of the specifications.

          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 3:00 p.m.
      (local time), September 15, 2016. Questions may be submitted as follows:
                              Email: holderds@cityofgainesville.org
                              or
                              Faxed (352) 334-3163
                              Attention: Diane Holder

2.   Please find attached:

          a) Copy of the black-out period information (Financial Procedures Manual Section 41-424
              Prohibition of lobbying in procurement matters)) distributed during non-mandatory pre-bid
              meeting.
          b) Pre-bid sign in sheet
          c) List of pre-bid dial-in participants

3.   Diane Holder, Purchasing Division, discussed bid requirements.

          a. Sign-in Sheet is circulating. A teleconference option was offered.
              i.   If you have dialed-in, please email your information (Business name, address, Your
                   name, email address, phone number and fax number) to Diane Holder.
          b. Bids are to be received by the Purchasing office no later than 3:00 p.m. on September 22, 2016.
              Any bids received after 3:00 p.m. on that date will not be accepted.
          c. Send questions in writing to Diane Holder via email or fax.
              i.   All communication through Diane Holder or Purchasing staff 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 3PM on September 22, 2016.
          e. Various forms are to be completed and returned with your bid.
              i.   Sign, date and return all Addenda.

The following are answers/clarifications to questions received <u>prior</u> to the non-mandatory pre-bid conference:

4. Question: Pg. 3- paragraph 5 – Please clarify if the Technical Proposal and Price Proposal are to be submitted in separate envelopes. If separate envelopes are required, how many copies of the Price Proposal is desired including electronic?
   Answer: Separate envelopes are not required. The price proposal should be included with the original, each copy and electronic.

5. Question: Pg. 3 – paragraph 5 states that in the absence of a corporate seal the proposals must be notarized. My questions is does Exhibit E, pg. 30 "Proposal Response Form – Signature Page" meet this requirement?
   Answer: Yes.

6. Question: Pg. 30, Exhibit E – Is this completed form to be duplicated and included in each copy or is one original copy included with the proposals sufficient: If the City does require separate Technical and Price Proposals-does Exhibit E need to be completed and notarized for each (2 originals)?
   Answer: The completed form should be included in the original and each copy.

7. Question: Pg. 4, F. Additional information/Addenda, paragraph 4 – is the City requiring that we verify with the designated contact person, Diane Holder, prior to submitting a proposal that all addenda have been received? I see that Exhibit E has a place to acknowledge the number of addenda received.
   Answer: All addenda are posted on Demandstar. You may also verify with the designated contact person prior to submitting a proposal that all addenda have been received. The signature page of each addendum should be included with your proposal.

8. Question: Pg. 8, X. Art in Public Places – does the City intend for "Art in Public Places" to be a requirement for this project?
   Answer: No.

9. Question: Pg. 8, Davis-Bacon-is compliance with the Davis-Bacon Act and the DOL regulations required for this project?
   Answer: No.

10. Question: Pg. 19, Section VII Price Proposal-I am not clear what the City is looking for in the Price Proposal. It states that the methodology and approach on each of the six ERP consulting services must be included and shall not exceed 5 pages. However, on pg. 11, Section III, A.2, it asks for the proposal approach to be provided in the Technical Proposal. It would be difficult to detail the methodology and approach in the Price Form table format and to not exceed 5 pages.
    Answer: **<u>CHANGE:</u>** Section VII- The Price Proposal Form is changed to:
    "A ***brief summary*** of the methodology and approach on each of the six ERP consulting services must be included and shall not exceed 5 pages." The detail is in the Technical Proposal Section.

The following are answers/clarifications to questions received <u>at </u>the non-mandatory pre-bid conference:

11. Question: Phase VI is hard to propose not knowing what firm is selected. What level of detail in the services we provide do you want in the proposal?
    Answer: We suggest you give options, listing your experience with the different options on the Response Form-Experience.

12. Question: Page 1 – Finance mentions "Asset Management". Is this fixed assets or ERP management?
    Answer: This is a fixed asset module within an ERP.

13. Question: Does the City expect the consultant to attend all vendor demonstrations on site?
    Answer: Yes.

14. Question: Are there any milestones influencing your decisions. i.e. maintenance deadlines, lack of support.
    Answer: We do have an aggressive schedule. We hope the successful consultant can provide us with a realistic but aggressive timeline. Our time entry system is antiquated and probably the first thing tackled. We do have the support from the city commission to move forward with the project.

15. Question: Is the City utilities a part of this project.
    Answer: The HR system will be for both. The financial side is just for General Government.

16. Question: Do you expect the consultant to give presentations of the needs assessment or the conclusion of the selection?
    Answer: Yes, we would expect presentations to the city manager for both the needs assessment and the recommendation to move forward.

17. Question: Does the City have any other technology or initiative projects that would impact this project?
    Answer: There are several projects, but not any that would impact this project.

The following are answers/clarifications to questions received <u>after </u>the non-mandatory pre-bid conference:

18. Question: Will the City accept proposals that include optional services not specifically requested in the Scope of Work?
    Answer: Yes, please provide separate prices.

19. Question: Does the City desire that status reports be provided as part of this project? If so, at what frequency (e.g., bi-weekly, monthly)?
    Answer: Yes, at a less frequent interval at the beginning and end, but weekly in the middle.

20. Question: For the purposes of the cost proposal, will cost by project deliverable suffice (e.g. ERP software specifications priced as one deliverable, the RFP priced as one deliverable)?
    Answer: Yes, as long as it is provided in the categories outlined in Section II Scope of Services, A 1-6.

21. Question: Does the City have a budget for this project? If so, what is it?
    Answer: $7 million.

22. Question: Would the City please elaborate on any additional drivers for the project not identified in the RFP?
    Answer: Some key components are currently unsupported, i.e., time entry & document management. Other desired components are not currently implemented.

23. Question: Would the City please elaborate on the expectations related to the requested task that the selected consultant will develop the vendor statement of work?
    Answer: Upon selection of a system vendor, the City may require assistance in developing and negotiating a statement of work with the ERP vendor for system implementation and maintenance.

24. Question: In Section 2(B) of the RFP the City identifies minimum experience levels. Would the City please clarify whether all staff assigned to the project must have three years of experience, or whether this applies to the Project Manager only?
    Answer: This applies to the Project Manager and other key staff. Support or peripheral staff may have less experience.

25. Question: In Section 2(A) of the RFP, document management is identified as an area of study. Would the City please clarify if the City is looking for an enterprise document management system that would be used across various software systems, or whether the City is interested in exploring document management capabilities within a new ERP system?
    Answer: Enterprise document management system that will be integrated with the ERP system.

26. Question: Would the City please clarify the scope and expectations surrounding the assessment of the City's technical infrastructure identified in Section 2(A) (1) (b)?
    Answer: The City has a large number of homegrown and piece meal technology solutions across the organization. This will provide an inventory and assessment of whether those systems should be included in this overall ERP project, sunset, or left as is.

27. Question: Would the City please clarify the scope and expectations surrounding the assessment of the City peripheral systems identified in Section 2(A) (1) (b)? What specific systems or areas might be included in the scope of this assessment??
    Answer: Timekeeping, document management, scheduling, cashiering, billing, learning management, performance management, building permits, business tax billing and payments, reporting, employee self-service are examples.

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.**

<div align="center">CERTIFICATION BY PROPOSER</div>

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: Chrysalis Government Solutions

BY:

DATE: September 22, 2016

CITY OF_____ FINANCIAL SERVICES
GAINESVILLE   PROCEDURES MANUAL

41-424   <u>**Prohibition of lobbying in procurement matters**</u>

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

CITY OF GAINESVILLE
GENERAL GOVERNMENT PURCHASING DIVISION
NON-MANDATORY PRE-PROPOSAL CONFERENCE
RFP for Enterprise Resource Planning (ERP) Consulting Services
DATE: September 8, 2016 @ 9:00AM LOCAL TIME
BID#FADM-170007-DH
DUE DATE: September 22, 2016, AT 3:00PM

YOUR *COMPANY'S* NAME, ADDRESS & PHONE NUMBER

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YOUR SIGNATURE, PRINTED *NAME,* EMAIL ADDRESS & FAX NUMBER

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E-MAIL: *&;an. Pesl5@Piohl !'11orAh.t:dl1t*
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CITY OF GAINESVILLE
GENERAL GOVERNMENT PURCHASING DIVISION

Dial-in Participants

<u>NON-MANDATORY PRE-BID CONFERENCE</u>
RFP for Enterprise Resource Planning (ERP) Consulting Services
DATE: September 8, 2015 @ 9:00 AM LOCAL TIME
BID #FADM 170007-DH
DUE DATE: September 22, 2016, AT 3:00PM

YOUR **_COMPANY'S_** NAME, ADDRESS &
PHONE NUMBER

YOUR SIGNATURE, PRINTED **_NAME_**,
EMAIL ADDRESS & FAX NUMBER

1) SoftResources LLC

11411 NE 124th Street, Suite 270

Kirkland, WA 98034

PHONE # (425)216-4016

_____
SIGNATURE
Christine Panian
PRINTED NAME
E-MAIL: cpanian@softresources.com

FAX # (425)968-4131

---

2) Berkeley Research Group, LLC

700 Louisiana Street, Suite 2600

Houston, TX 77002

PHONE # (713)481-9437

_____
SIGNATURE
Sue Abdelaziz
PRINTED NAME
E-MAIL: sabdelaziz@thinkbrg.com

FAX # (832)862-2266

---

3) Berkeley Research Group, LLC

700 Louisiana Street, Suite 2600

Houston, TX 77002

PHONE # (713)493-2552

_____
SIGNATURE
Faisal Amin
PRINTED NAME
E-MAIL: famin@thinkbrg.com

FAX # (832)862-2284

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4) BerryDunn

100 Middle Street

Portland, Maine 04104

PHONE # (207)842-8012

_____
SIGNATURE
Jennifer Vincent
PRINTED NAME
E-MAIL: jvincent@berrydunn.com

FAX # (207)842-8012

---

5) Baker Tilly Virchow Krause, LLP

205 N. Michigan Ave.

Chicago, IL 60601-5927

PHONE # (312)729-8098

_____
SIGNATURE
Caitlin Humrickhouse
PRINTED NAME
E-MAIL: caitlin.humrichhouse@kbakertilly.com

FAX # (312)240-2491

ADDENDUM NO. 3

CITY OF
GAINESVILLE
every path starts with passion
FLORIDA

Date: September 21, 2016   Bid Date: September 22, 2016
                                                                          at 3:00 P.M. (Local Time)

RFP Name: Enterprise Resource Planning (ERP) Consulting Services   Bid No.:   FADM-170007-DH

NOTE: This Addendum has been issued only to the holders of record of the specifications.

          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:

     The following are answers/clarifications to questions received after the non-mandatory pre-bid
     conference:

1. Question: If a vendor is selected as the ERP consultant, and the City determines they should replace their
               ERP can that vendor also respond to the RFP to provide the ERP services?
    Answer: No. The ERP consultant may be requested to provide assistance with the development of the
               RFP, evaluation and contract negotiation of the ERP system. Therefore it would be a conflict.

**NOTE: If your response has been mailed/shipped/submitted, this Addendum No. 3 may be acknowledge
and returned separately to Diane Holder at holderds@cityofgainesville.org.**

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 3 by his or her
signature below, **and a copy of this Addendum to be returned with proposal.**

<div align="center">CERTIFICATION BY PROPOSER</div>

The undersigned acknowledges receipt of this Addendum No. 3 and the Proposal submitted is in accordance
with information, instructions, and stipulations set forth herein.

PROPOSER: Chrysalis Government Solutions

BY:

DATE: September 22, 2016