BerryDunn

BerryDunn's Proposal to Provide

Enterprise Resource Planning (ERP) Consulting Services
to the City of Gainesville

CITY OF
GAINESVILLE
every path starts with passion
FLORIDA

Proposal Submitted by:

Chad Snow, PMP, CFE, Principal
Ryan Doil, MBA, Project Manager
BerryDunn
100 Middle Street
Portland, ME 04101
Phone: (207) 541-2200
csnow@berrydunn.com
rdoil@berrydunn.com

Proposal Submitted on

September 22, 2016, by 3:00 p.m.

Cover Letter

September 22, 2016

Ms. Diane Holder
City of Gainesville
General Government Purchasing
200 East University Avenue, Room 339
Gainesville, Florida 32601

Dear Ms. Holder:

Berry Dunn McNeil & Parker, LLC (BerryDunn) is pleased to submit this proposal in response to the City of Gainesville, Florida's (City) Request for Proposal (RFP) No. FADM-170007-DH for Enterprise Resource Planning (ERP) Consulting Services. We have read the RFP, understand its contents, and agree to the terms and conditions therein. Our proposal is a firm and irrevocable offer that is valid for 120 days from the proposal due date of September 22, 2016.

BerryDunn is an independent management and information technology (IT) consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We are a stable and well-established firm that has preserved our core values and reputation for excellence for 42 years. We have enjoyed steady growth by providing consistent, high-quality services to our clients in 48 states and provinces throughout the US and Canada.

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

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

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

Sincerely,

Chad Snow
Principal

PROPOSAL RESPONSE FORM – SIGNATURE PAGE

(submit this form with your proposal)

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

PROJECT:

RFP/RFQ#:

RFP/RFQ DUE DATE:

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

Proposer's Alias/DBA: BerryDunn

Proposer's
Address   100 Middle Street

               Portland, ME 04101

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)
      Name: Charles Snow   Telephone Number (207)541-2294

      Date: September 22, 2016   Fax Number (207)774-2375

                                               Email address csnow@berrydunn.com

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s ___1___, ___2___, ___3___, 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

30

Exhibit E

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:

Carole Ann Cole Wood
Signature
By: _Carole Ann Cole Wood_

Title: _Administrative Assistant_

Signature
By: Charles Snow

Title: Principal

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?
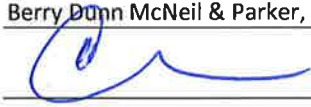   Answer: See #3 above.

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: Berry Dunn McNeil & Parker, LLC

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.

ADDENDUM NO. 2

CITY OF
GAINE VILLE
every path starts with passion
FLORIDA

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.**

CERTIFICATION BY PROPOSER

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

PROPOSER: Berry Dunn McNeil & Parker, LLC

BY:

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.

CITY OF GAINESVILLE
GENERAL GOVERNMENT PURCHASING DIVISION
NON-MANDATORY PRE-PROPOSAL CONFERENCE
RFP for Enterprise Resource Planning (ERP) Consulting Services
DATE: September 8, 2016 @ 9:00 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) PLANTE MORAN
27400 NORTHWESTERN HWY PO BOX 307
SOUTHFIELD, MI 48037-0307
PHONE # (248) 223-3785

SIGNATURE
BRIAN PESIS
PRINTED NAME
E-MAIL: Brian.Pesis@Plantemoran.com
FAX # (248) 327-8638

2) _____

SIGNATURE
_____
PRINTED NAME
E-MAIL: _____
PHONE # (___) _____

FAX # (___) _____

3) _____

SIGNATURE
_____
PRINTED NAME
E-MAIL: _____
PHONE # (___) _____

FAX # (___) _____

4) _____

SIGNATURE
_____
PRINTED NAME
E-MAIL: _____
PHONE # (___) _____

FAX # (___) _____

5) _____

SIGNATURE
_____
PRINTED NAME
E-MAIL: _____
PHONE # (___) _____

FAX # (___) _____

CITY OF GAINESVILLE
GENERAL GOVERNMENT PURCHASING DIVISION
<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

<div style="border:1px solid red">Dial-in Participants</div>

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

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.**

CERTIFICATION BY PROPOSER

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: Berry Dunn McNeil & Parker, LLC

BY:

DATE: September 22, 2016

DRUG-FREE WORKPLACE FORM

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

Berry Dunn McNeil & Parker, LLC   does:
                  (Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.

3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).

4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.

6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

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

Bidder's Signature
September 22, 2016
Date

1.0 Table of Contents

2.0 Technical Proposal

2.1 Our Understanding of the Scope

The City of Gainesville is a community of approximately 100,000 citizens in Alachua County, Florida. It is also home to the University of Florida, the ninth-largest university campus in the nation. The City currently uses CGI's Advantage ERP solution to manage its full breadth of financial and human resources functions. In an effort to replace antiquated systems and automate additional processes, the City has an interest in identifying an ERP solution that meets these needs, as well as the following additional functions:

- Document management
- Timekeeping
- Cashiering
- Applicant tracking
- Employee onboarding

The City intends to consider all available options including upgrading the CGI system, acquiring multiple best-of-breed applications, and implementing a single integrated solution. As a result, the City is seeking the services of a qualified consultant to assist it in evaluating its current software environment, documenting its needs, defining functional and technical requirements, creating an RFP for a new ERP system, evaluating proposed solutions, and negotiating a software contract.

An ERP system acquisition is one of the largest and most far-reaching projects that a municipal government will carry out in terms of its impact on how work is conducted and the way in which day-to-day tasks are accomplished. ERP projects are typically larger in scope than other software projects, which often focus on a more limited set of business processes. Accordingly, the associated risks are relatively higher, as enterprise-wide projects affect more users, each of whom may have different and possibly conflicting needs and requirements.

When undertaking a project of this scope and importance, City leaders must have every confidence that they have selected a consultant that is fully familiar with municipal ERP system technologies, knows how to work with a large and diverse group of users in a way that will accurately assess their needs, can translate these needs into a meaningful set of practical ERP system requirements, and maintains independence from sellers of specific products. Likewise, this consultant must be able to understand where the City is today, assist in envisioning where it would like to be, and help chart the smoothest course to get there. BerryDunn's track record of successful engagements assisting municipalities in the selection and implementation of ERP systems demonstrates our value as a partner for the City. The key strengths of our proposal that we consider to be most pertinent to the City's needs for this project are:

- **As part of our dedication to understanding the industry, BerryDunn requires that all of its employees participate in ongoing Continuing Professional Education (CPE).** As a result, our consultants consistently pursue new technical, professional, and project management certifications. We also conduct annual internal vendor demonstrations where we invite multiple vendors of a certain type of software solution (e.g., ERP, Financial, HR, Payroll, Community Development) to demonstrate their newest functionality and present on trends they see in the industry. **In addition, approximately 75% of our team has prior experience working in government.** This balance of formal education and market awareness enables us to provide services that align with industry best practices and continually expands our knowledge of technology solutions available in the market.

- **Assisting our clients in the evaluation, replacement, and implementation of enterprise systems is a core service of our team.** Our proposed team members have experience in every stage of enterprise system selection projects, from needs assessment and gap analysis to requirements definition, RFP development, evaluation of proposals, coordination of vendor demonstrations, scoring facilitation, contract negotiations, and project management activities. Their collective experience includes in-depth knowledge of utility, community development, financial, payroll, and human resources systems. This highly qualified team will also benefit from the expertise of our 80-person Government Consulting Group, which includes former CIOs, municipal IT directors, and government procurement and finance staff.

- **We use a structured and collaborative approach to fact-finding and eliciting feedback from stakeholders.** BerryDunn establishes an open line of communication with stakeholders well before our first site visit by requesting existing documentation and distributing clear project communications. In our experience, setting clear and reasonable expectations helps to engage participants for more productive fact-finding sessions and, ultimately, a better understanding of the City's needs relative to its future ERP environment. Our approach to conducting fact-finding meetings involves multiple BerryDunn team members, as we strive to be flexible and often conduct follow-up or one-on-one meetings with stakeholders who might be unable to attend planned sessions due to unforeseen circumstances.

- **We preserve our independence to ensure that we work only in the best interest of our clients.** This begins with our refusal to have any preferred vendors. You will not find our firm name listed as partners, affiliates, or sponsors on any ERP software vendor websites. This means we can assure you that, if selected for this project, BerryDunn will work only in the City's best interests and can be trusted by the City to develop a comprehensive RFP that encourages competitive responses from vendors in the market.

2.2 Proposed Approach

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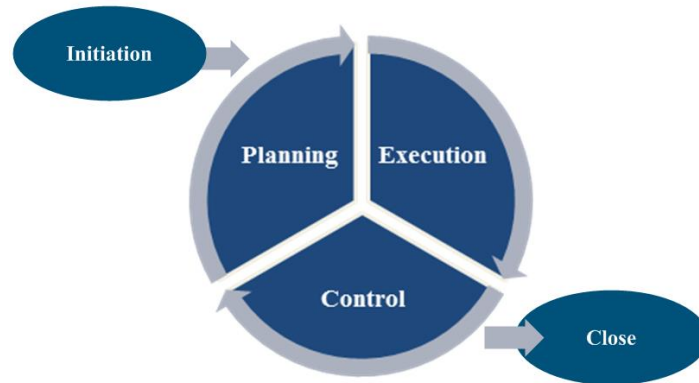
Exhibit A: Project Management Lifecycle

Tools and Technology

For the daily management and undertaking of project tasks, we strive to avoid unnecessary delays, enhance productivity, promote collaboration, and minimize barriers to participation. To that end, we utilize software that is familiar to most users, as shown in Table 1. As part of the initial planning process and as needed throughout the project, we will review software preferences and user accessibility needs to ensure we are meeting the City's needs.

Table 1: Program Management Technology/Tools

Technology/Tool	Description and Benefits for This Project
BerryDunn KnowledgeLink (Microsoft SharePoint)	BerryDunn has established BerryDunn KnowledgeLink, a customized Microsoft SharePoint tool, to secure and share project documentation and facilitate secure online communication and collaboration with City internal stakeholders. This application has the ability to maintain online project calendars, lists of project team members, and contact information. In addition, it serves as a repository for documents created throughout the engagement. After the City's work with BerryDunn is concluded, the City may retain access to the site that we will set up to manage this project, providing a way to easily transfer knowledge and project records from BerryDunn to the City.
Microsoft Word and Excel	Most of our deliverables are developed using these common software applications.

Technology/Tool	Description and Benefits for This Project
Microsoft Project	We use Microsoft Project to develop and maintain project schedules. Where licensing constraints present a barrier, BerryDunn can easily provide an alternative format, such as PDF, for ease of client access. All of our project managers are familiar with Microsoft Project and use it to manage engagements.
Adobe Acrobat	We frequently provide "final" documents in Adobe PDF format, as this format allows documents to be easily shared with project stakeholders without the concern that documents have been altered. This transferable file format allows clients to access and read the deliverable documents without having to license specific Microsoft software products.
Microsoft PowerPoint	We use PowerPoint primarily for communicating key information during presentations and training sessions. In addition to displaying the PowerPoint presentation on a display screen, we provide handouts of the presentation for participants.
Microsoft Visio	We use Visio for the development of process flows, organization charts, and business process diagrams, and typically provide clients with final versions in both Visio and PDF formats.
Teleconference Bridge, Videoconference, and Recording	BerryDunn provides teleconference and videoconference technology, which allows up to 20 callers to participate in teleconferences and multi-point video conferences.
GoToMeeting	BerryDunn maintains multiple accounts with this industry-leading, web-based collaboration software. It is easy to use and allows for effective communication and collaboration even when all team members are not in the same location.

Change Management Best Practices

Our approach is to *lead* the City through the full ERP system selection lifecycle, from the definition of requirements to the development of an RFP, evaluation of proposals, facilitation of vendor demonstrations, and negotiation of a contact. Members of our Local Government team are Prosci® Certified Change Management Practitioners and we follow the Prosci® PCT™ Model, a structured and collaborative process with multiple opportunities for stakeholders to offer input and confirm our findings. We have found that this results in greater buy-in and support for the future system, as well as an end product that fully and specifically addresses the City's needs.

Prosci® PCT™ Model
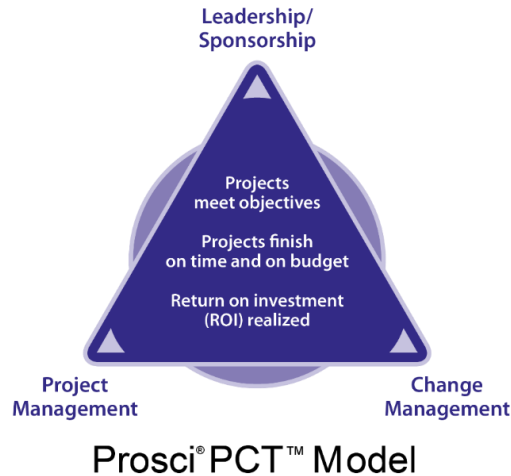
BerryDunn has experienced resistance to change in all of our systems planning, procurement, and implementation oversight engagements. This reinforces our belief that the management of change is crucial to the success of this project. Our systems planning approach builds in proactive change management by involving the City stakeholders at key stages through the planning and procurement process to gain input, build support, and promote buy-in for the decisions that are made.

2.3 BerryDunn System Requirements Development (SRD) Methodology

BerryDunn has developed an efficient, effective, and proven methodology for assessing ERP system needs. In our evaluation, we will consider the City's current and future business and operating needs, assess current systems and processes in light of these needs, and make objective and independent recommendations. Through our work, we expect to develop a collaborative working relationship with the City. This will facilitate understanding and help gain buy-in and support for our recommendations and the necessary initiatives the City will need to undertake in the future. On the following page, Exhibit B presents BerryDunn's System Requirements Development Methodology, which we have developed and refined over ten years of providing similar systems planning services.
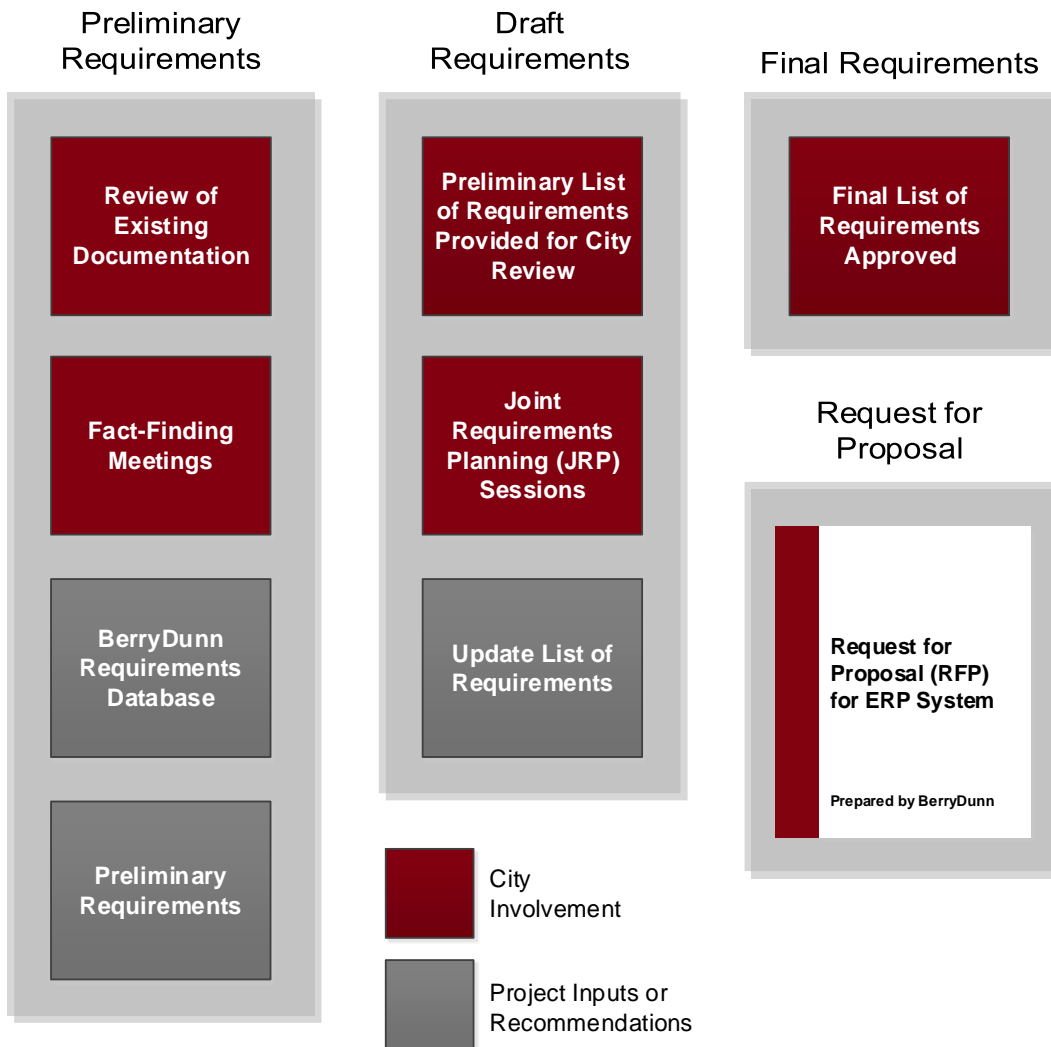
Preliminary Requirements

Review of Existing Documentation

Fact-Finding Meetings

BerryDunn Requirements Database

Preliminary Requirements

Draft Requirements

Preliminary List of Requirements Provided for City Review

Joint Requirements Planning (JRP) Sessions

Update List of Requirements

Final Requirements

Final List of Requirements Approved

Request for Proposal

Request for Proposal (RFP) for ERP System

Prepared by BerryDunn

City Involvement

Project Inputs or Recommendations

Exhibit B: SRD Methodology

2.4 Detailed Work Plan

Project Planning and Project Management

In alignment with the City's requested scope for **Assistance with Structure/Setup of Internal Project Management Team,** BerryDunn's project team will conduct an initial project planning teleconference with the City's Project Management Team to review our proposed Plan of Services and Schedule, clarify goals and objectives, identify known project constraints, and refine dates and/or tasks as appropriate. We will then draft a detailed **Project Management Plan and Schedule** for distribution to project team members detailing the scope of work to be performed, identification of stakeholder groups and roles, a Project Communication Plan, and an Organizational Change Management Plan.

We will facilitate an on-site meeting with the City to gain the Project Team's approval of the Project Management Plan and Schedule, collecting any feedback for incorporation in the final version. While on-site, we will facilitate a City Leadership Kickoff meeting to identify project goals and objectives, as well as any future state objectives from the perspective of City leadership. (*On-site Trip #1).*

As part of BerryDunn's ongoing project management of this engagement, we will provide **Bi-monthly Project Status Reports**. These reports will include a description of the activities and accomplishments for the reporting period, plans for the upcoming two weeks, challenges encountered during the reporting period, and anticipated problems that may impact project deliverables. We will deliver each report in advance of the project status update meetings which will be conducted via a teleconference call with the Project Management Team.

Task/Deliverable	Estimated Timeframe
1. Conduct Initial Project Planning	
2. Develop Project Management Plan and Schedule	
D1. Project Management Plan and Schedule	Weeks 1-5
3. Develop Bi-monthly Project Status Reports and Facilitate Bi-monthly Status Calls	
D2. Bi-monthly Project Status Reports	

Phase 1: Current Environment Needs Assessment

Prior to conducting our on-site work, and in alignment with the City's requested scope for **a Needs Assessment,** we will provide the City with an Information Request Sheet to request available documentation that will be helpful to us during the project. We will also develop and distribute a Web survey to City staff to understand issues and challenges with current system(s). The results of the information request and survey will be used as one of many data points in developing our evaluation of the current system.

We will conduct an on-site project kickoff meeting with City leadership and all project stakeholders, as well as fact-finding meetings with City staff from the departments identified as future users of the ERP system, including all IT staff and stakeholders from each department. (*On-site Trip #2).* Drawing on the information gathered through our review of documentation, Web survey results, and on-site fact-finding sessions, we will prepare a **Current Environment Needs Assessment Report**. The Report will include, at a minimum:

- A summary of the current environment and business processes
- Identification of current functional and technical needs, both met and unmet
- Considerations for fully-integrated versus best-of-breed software solutions
- Organizational change readiness assessment summary
- Identification of system interfaces/integration needs
- Considerations for on-premise, hosted, and SaaS deployments

We will provide a draft of the Report to the City for review and facilitate an on-site work session to explain our findings and gain feedback. We believe it is important to obtain the City's validation and approval of these findings, as this information will serve as the basis for future requirements. We will then revise the Assessment Report and update to final. *(On-site Trip #3).*

Task/Deliverable	Estimated Timeframe
4. Request and Review Existing Documentation	
5. Develop and Administer End-User Web Survey	
6. Facilitate Project Kickoff Meeting	Weeks 3-12
7. Conduct On-site Fact-finding Meetings	
8. Develop Draft Current Environment Needs Assessment	
D3. Current Environment Needs Assessment	

Phase 2: Procurement Process Facilitation

To address the scope of activities identified in the City RFP related to **Development of the ERP and Peripheral Systems Requests for Proposals (RFP),** the BerryDunn team will be drawing from our requirements database as well as our knowledge of ERP system functionality and best practices, we will develop **Preliminary Functional and Technical Requirements** based on our understanding of the City's current business and technical environment. Using the preliminary list of requirements as a starting point, we will schedule on-site Joint Requirements Planning (JRP) work sessions with groups of City staff members for each of the core business areas that require a list of functional requirements. (*On-site trip #4).* During these facilitated work sessions, BerryDunn will work collaboratively with participants and challenge staff to consider "desired" or "required" needs in the future environment. We will collect a single summary of changes from

the City, make all requested updates, and issue the **Final Functional and Technical Requirements**.

During this on-site trip, BerryDunn will meet with City leadership and a representative from the City's procurement staff to identify required standards for inclusion in an RFP and establish a timeline for the RFP development. We will then develop the RFP using a proven format that incorporates information on the history of the project, a high-level description of the City's current environment, the City's desired approach to implementing a new ERP system, the City's functional and technical requirements, and a structured list of points for vendors to address in their response. BerryDunn will coordinate a teleconference meeting with the City's Procurement Team to review the draft RFP, collecting any feedback or additional terms for inclusion, before providing the final **RFP Document** to the City for distribution.

Task/Deliverable	Estimated Timeframe
9. Develop Preliminary Functional and Technical Requirements	
D4. Preliminary Functional and Technical Requirements	
10. Conduct Joint Requirements Planning (JRP) Work Sessions	
D5. Final Functional and Technical Requirements	Weeks 12-16
11. Develop Request for Proposals Document	
12. Facilitate Teleconference to Review Draft RFP	
D6. RFP Document	

Phase 3: ERP Evaluation and Selection of Vendor

BerryDunn will facilitate the requested **ERP Proposal Submission/Evaluation Process** by analyzing vendor proposals and developing an executive-level summary Level-of-Fit Analysis, delivered as Proposal Summary Memos. We will then facilitate an on-site meeting with the City's Evaluation Team to review the proposal summaries, elicit discussion of each proposal received, assist in the scoring process, and collect scores to identify the top three preferred vendors to invite for demonstrations. (*On-site trip #5).*

The latter portion of the meeting facilitated for first-round vendor scoring will be dedicated to discussing the format and scripts for vendor demonstrations. We will develop a draft demonstration script template and provide it to the City for review. After finalizing a City-approved version, we will provide the appropriate scripts to each vendor and conduct a one-hour teleconference call with each to address any questions or concerns they might have. We will coordinate and facilitate two-day vendor demonstrations for up to three vendors at the City's offices, with a second round of vendor scoring immediately following to identify the vendor(s) whose references the City will check. (*On-site trip #6).* BerryDunn will develop memos

for City staff that describe how to prepare for reference checks and site visits. Following the City's last site visits, we will facilitate a final scoring meeting via teleconference for the City to make its **Preferred Vendor Selection**.

Prior to contract negotiations, our team will draft a presentation of the City's preferred vendor. It will detail the process used to arrive at the selection, as well as key decision factors, with the purpose of promoting buy-in for the chosen solution. We will conduct a teleconference review of the draft presentation with the City Project Management Team to collect feedback and revisions prior to participating in an on-site **Presentation of the Preferred Vendor**. *(On-site Trip #7).*

Task/Deliverable	Estimated Timeframe
13. Analyze Vendor Proposals	
14. Facilitate First-round Vendor Scoring	
15. Develop Demonstration Scripts	
16. Conduct Teleconferences with Finalist Vendors to Discuss Demonstration Scripts	
17. Facilitate Vendor Demonstrations	Weeks 20-28
18. Facilitate Second-round Vendor Scoring	
19. Prepare City Staff for Reference Checks and Site Visit	
20. Facilitate Final Round of Vendor Scoring	
21. Develop and Deliver Presentation of Preferred Vendor	
D7. System Selection Assistance and Presentation of Preferred Vendor	

Phase 4: ERP Statement of Work and Contract Negotiations

Following the City selection of its preferred vendor, but prior to beginning negotiations, we will discuss the negotiation strategy with the City and identify key roles for decision-making. We will then draw on the information gathered during our review of the vendor's proposal, identify any concerns, and provide the vendor with an opportunity to respond with requested modifications.

We will work with the City's project team and legal counsel, as well as the preferred vendor to develop a draft contract, using the City's contracting procedures and the vendor's proposal as starting points. We will review the contract documents in consultation with the City to ensure that requirements are clearly defined and to establish that the City agrees to the schedule, implementation process, fee arrangement, scope of services, vendor resources, deliverables, costs, acceptance criteria, and terms and conditions. In addition, we will be "at the table" to provide **Contract Negotiation Assistance**. Based on our experience conducting contract negotiations, we recognize that the level of effort can vary significantly depending on several

factors. We have planned for 50 hours of contract negotiation services per vendor contract (to be billed as used), which we have found is generally appropriate for a project of this scope and size.

Task/Deliverable	Estimated Timeframe
20. Assist City with Contract Negotiations	Weeks 29-33
D9. Contract Negotiation Assistance	

Optional Deliverable – Action Plan

After considering the information gathered through our fact-finding activities alongside the outcomes of key decision points in the Current Environment Assessment Report, BerryDunn will develop a draft Action Plan that addresses the City's desired path forward as it relates to upgrading or replacing the current CGI product prior to moving into Phase 3 (Procurement Process). The Action Plan will include a prioritization of solution requirements, phasing considerations related to potential solution implementation, suggested time frames for implementing the solution(s), and recommendations on City resource team structure. A teleconference will be facilitated with the City Project Management Team to review the draft Plan, and confirm the findings, prior to updating the Plan to Final.

Phase 5: Implementation Assistance

BerryDunn is prepared to offer two different levels of service related to implementation assistance for the City of Gainesville to consider. There are many factors that may impact the duration and scope of an implementation including the system selected, the number of systems selected, and City resources available. The average weekly work effort for the BerryDunn team have been identified below, however further information would be required to develop an accurate cost estimate for these services. Key tasks and deliverables associated with the two levels of implementation assistance are presented below.

Project Oversight	Project Management
BerryDunn serves in an oversight role, complementing the existing City Project Manager with project management activities. *Average of 20 hours per week*	**BerryDunn acts on the City's behalf as a full-time project manager.** *Average of 40 hours per week*
- Facilitate Weekly Project Team Meetings - Perform Project Milestone Tracking - Facilitate Vendor Deliverable Reviews - Deliver Monthly Project Status Reports - Facilitate Risk Identification and Mitigation Activities - Perform Go-Live Readiness Assessments	**Project Oversight Services**, plus: - Deliver Onsite Project Management Activities - Overseeing User Acceptance Testing Assistance - Training Oversight Assistance - Communications and Change Management Assistance

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	$32,620	$3,260	181	2	Fixed Fee
2	Assistance With Structure/Setup of Internal Project Management Team	$10,855	$1,085	42	1	Fixed Fee
3	Development of Enterprise Resource Planning RFP	$17,980	$1,800	104	1	Fixed Fee
4	Assistance in ERP Proposal Submission/Evaluation Process	$18,230	$1,825	113	2	Fixed Fee
5	Assistance with ERP Vendor Contract Negotiations	$8,500 per contract	$850 per contract	50 per contract	1	Billed as Incurred
6	Assistance in Implementation	TBD	TBD	TBD	TBD	Time and Expenses

Company Name: Berry Dunn McNeil & Parker, LLC
Authorized Signature & Title: _____ Principal
Print/type Name as Signed Above: Charles Snow   Date: 9 / 22 /16

33

In addition to the requested service detailed on the preceding form, our proposed price for the **Optional Deliverable – Action Plan** proposed in Section 2.4 of this proposal is **$5,075** - $4,615 in fees and $460 in expenses.

4.0 BerryDunn Qualifications

4.1 Firm Profile

BerryDunn is a consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We were formed in 1974 with nine professionals and have experienced sustained growth throughout our 42-year history. Today, BerryDunn employs approximately 290 personnel, with office locations in Arizona, Maine, New Hampshire, and West Virginia, and satellite offices in Massachusetts and Minnesota. We provide a full range of services, including IT consulting; management consulting; and audit, accounting, and tax services.

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

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

BerryDunn's Government Consulting Group has been providing management and information technology consulting services to clients in local government since 1986. We maintain a national presence, and have worked with more than 275 local and state agencies throughout the country. We have extensive experience assisting municipal clients throughout the project lifecycle of ERP system selection and implementation—from evaluating current business processes and needs to developing RFPs, assisting with procurement and contract negotiations, and providing independent consulting to assist in system implementations.

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

- Alliance for Innovation
- American Planning Association (APA)
- American Public Works Associations (APWA)
- American Water Works Association (AWWA)
- Disaster Recovery Institute International (DRII)
- Florida City and County Managers Association (FCCMA)

- Government Finance Officers' Association (GFOA)
- International City/County Managers Association (ICMA)
- International Information Systems Security Certification Consortium (ISC^2)
- Project Management Institute (PMI)
- Urban Regional Information Systems Association (URISA)

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

Experience in the State of Florida

BerryDunn has a long history of working with Florida government organizations including the Cities of Boca Raton, Homestead, Coral Springs, Port Orange, Ormond Beach, and Orland, as well as the Hillsborough County and the Tampa Port Authority, as depicted below. We have sponsored and attended past FCCMA annual conferences. We support the mission of the FCCMA and we look forward to continuing to help the organization educate, share knowledge, and develop Florida government leaders.
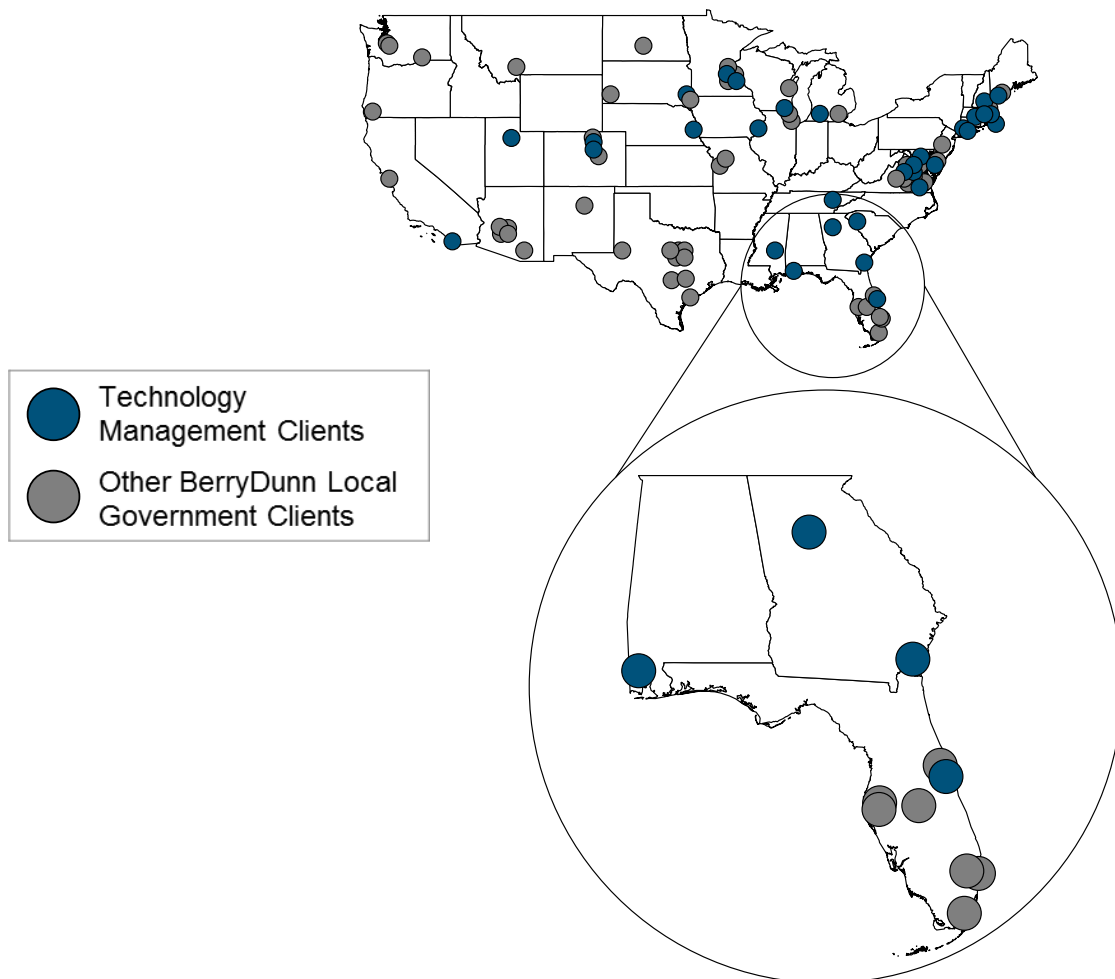
Statement of Independence

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

Training and Development

As a CPA firm, BerryDunn requires that all of its employees participate in ongoing Continuing Professional Education (CPE). As a result, our consultants consistently pursue new technical, professional, and project management certifications. We also conduct annual internal vendor demonstrations where we invite multiple vendors of a certain type of software solution (e.g. ERP, Financial, HR, Payroll, Community Development) to demonstrate their newest functionality and present on trends they see in the industry. This balance of formal education and market awareness enables us to provide services that align with industry best practices and recommendations that span the full range of technology solutions available.

Firm Financial Stability

As a privately held Certified Public Accounting and Consulting firm, BerryDunn is not required to prepare audited or un-audited financial statements. However, the financial information and exhibits provided in this section exemplify the strong financial condition of our firm. BerryDunn has sustained steady growth during our 42-year history.

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

Exhibit C (below) presents BerryDunn's revenue for the previous 15 fiscal years. Exhibit D (on the following page) provides BerryDunn's Condensed Financial Information for the previous three fiscal years. To further demonstrate our financial stability, we have provided a letter from BerryDunn's primary financial institution demonstrating our good standing.

Exhibit C: BerryDunn Yearly Revenue (in millions)
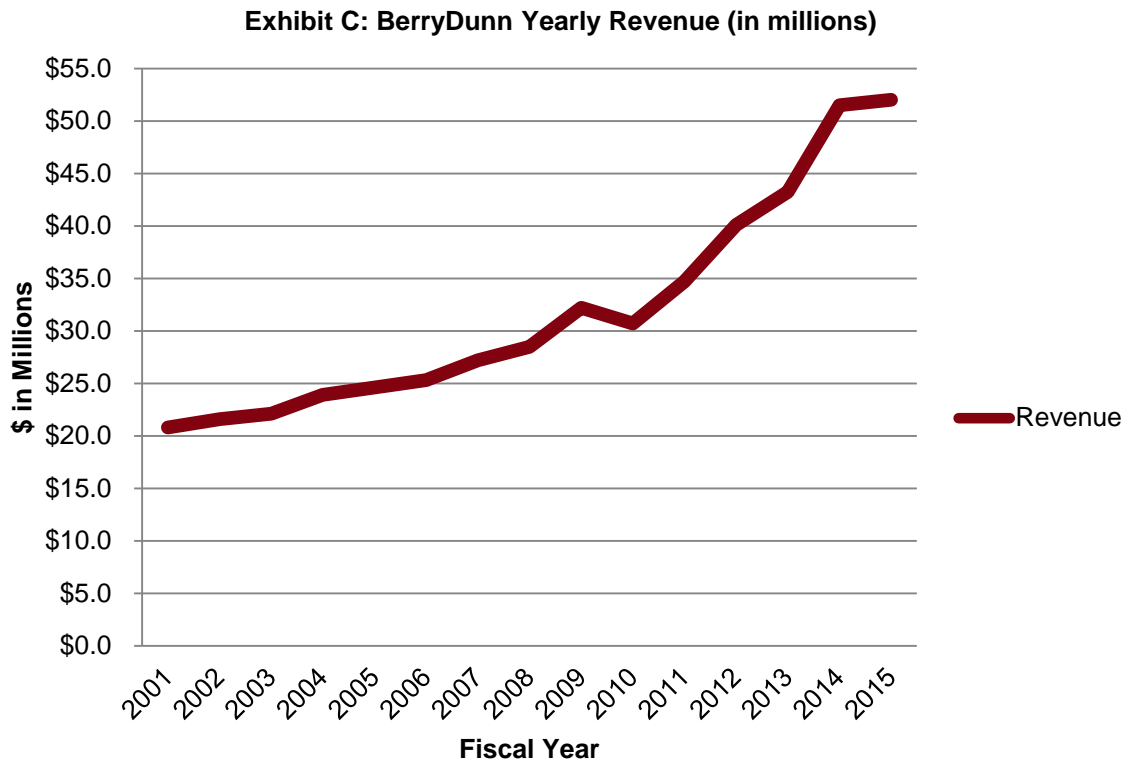
Response Form – Experience
(to be completed by all Respondents).

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 Boca Raton, Florida	In progress	In progress	ERP Needs Assessment and Actio	Chad Snow, Keith Damon, Ryan
2.	City of Bloomington, Minnesota	Tyler Technologies Munis	July 2015	ERP System Selection and Imple	Chad Snow, Keith Damon
3.	City of Glendale, Arizona	In progress	In progress	ERP System Selection Assistance	Chad Snow, Keith Damon, Micha
4.	City of Mesquite, Texas	Tyler Technologies Munis	November 2014	ERP System Selection and Imple	Chad Snow, Keith Damon
5.	City of Midland, Texas	Tyler Technologies Munis	July 2014	ERP System Selection Assistance	Chad Snow, Keith Damon
6.	City of Pearland, Texas	Tyler Technologies New World	In progress	ERP System Selection and Imple	Chad Snow, Ryan Doil, Adam Bat
7.	City of Santa Fe, New Mexico	In progress	In progress	ERP System Selection Assistance	Chad Snow, Ryan Doil, Adam Bat
8.	City of Surprise, Arizona	Tyler Technologies Munis	In progress	ERP System Selection and Imple	Chad Snow, Ryan Doil, Adam Bat
9.	City of West Jordan, Utah	Tyler Technologies Munis	October 2014	ERP System Selection Assistance	Chad Snow
10.	Washtenaw County, Michigan	Tyler Technologies Munis	In progress	ERP System Selection and Imple	Chad Snow, Keith Damon, Ryan

Company Name: Berry Dunn McNeil & Parker, LLC
Authorized Signature & Title: _____ Principal
Print/type Name as Signed Above: Charles Snow   Date: September 22, 2016

BerryDunn has extensive experience in providing a variety of systems consulting services to full-service cities similar in size to the City. In Table 2, we have included a summary of public sector clients our firm has assisted with the software selection process in the past five years. We have also provided population data and the clients' legacy systems in order to offer additional context regarding our experience.

Table 2: BerryDunn's Public Sector System Selection Consulting Clients

Client *(Population)*	System Type *(Legacy System)*	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
Hillsborough County, Florida *(1,234,000)*	Human Resources and Payroll *(non-integrated customized systems)*		✓	✓	✓	✓		
Lake County, Illinois *(700,000)*	Community Development *(Infor Hansen)*	✓	✓	✓	✓	✓	✓	
City of Tucson, Arizona *(525,000)*	Community Development *(Accela Permits Plus)*	✓	✓	✓	✓	✓	✓	
Washtenaw County, Michigan *(350,000)*	ERP *(Oracle J.D. Edwards)*	✓	✓	✓		✓		
City of Glendale, Arizona *(237,000)*	ERP *(PeopleSoft)*	✓	✓	✓	✓	✓	✓	
City of Irving, Texas *(230,000)*	ERP *(Banner)*, Utility Billing *(Harris inHANCE)*	✓	✓	✓	✓			
Sussex County, Delaware *(200,000)*	ERP *(Oracle J.D. Edwards)*	✓	✓	✓	✓	✓	✓	
Minnehaha County, South Dakota *(183,000)*	ERP *(non-integrated systems)*	✓	✓	✓	✓	✓	✓	
Kent County, Delaware *(170,000)*	Financial *(New World)*, Land Management *(SunGard HTE)*, CAMA *(Microsolve)*	✓			✓	✓	✓	
Scott County, Iowa *(166,000)*	ERP *(Platinum)*	✓	✓	✓	✓	✓	✓	✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Sioux Falls, South Dakota (158,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Alexandria, Virginia (150,000)	Land Management and Permitting (Accela Tidemark Advantage)	✓	✓	✓	✓	✓	✓	
City of Mesquite, Texas (134,000)	ERP (Performance)	✓	✓	✓	✓	✓	✓	✓
City of Coral Springs (128,000)	ERP (SunGard HTE)	✓						
City of Surprise, Arizona (121,000)	ERP (Mitchell Humphries FMS and Vista PDS)	✓	✓	✓	✓	✓	✓	✓
City of Midland, Texas (119,000)	ERP (CGI)	✓	✓	✓	✓	✓	✓	
City of West Jordan, Utah (108,000)	ERP (SunGard Pentamation)		✓	✓	✓	✓	✓	
City of Boulder, Colorado (105,000)	ERP (non-integrated customized systems)							✓
City of Pearland, Texas (96,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of College Station, Texas (95,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Boca Raton, Florida (91,000)	ERP (SunGard HTE and Infor Infinium), Community Development (SunGard HTE), Utility Billing (SunGard HTE)	✓	✓	✓	✓		✓	
City of Bloomington, Minnesota (86,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Bloomington, Minnesota (86,000)	Community Development (non-integrated systems)	✓	✓	✓	✓	✓	✓	✓

Client *(Population)*	System Type *(Legacy System)*	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Allen, Texas *(85,000)*	ERP *(SunGard HTE)*							✓
City of Rapid City, South Dakota *(72,000)*	ERP *(SunGard Bitech)*			✓	✓			✓
City of Santa Fe, New Mexico *(70,000)*	ERP *(Oracle J.D. Edwards EnterpriseOne and SunGard HTE)*	✓	✓	✓	✓	✓	✓	
City of Bismarck, North Dakota *(67,000)*	Community Development *(non-integrated systems)*	✓	✓	✓	✓	✓	✓	✓
City of Homestead, Florida *(65,000)*	Community Development *(SunGard HTE)*	✓	✓	✓	✓	✓	✓	✓
Town of Greenwich, Connecticut *(62,000)*	Human Capital Management System *(Tyler Technologies' MUNIS)*	✓	✓	✓	✓	✓	✓	✓
City of Medicine Hat, Alberta *(61,000)*	ERP *(Oracle J.D. Edwards)*	✓	✓	✓	✓	✓	✓	✓
City of South Jordan, Utah *(59,000)*	ERP *(MS Great Plains)*		✓	✓	✓	✓	✓	✓
City of Shoreline, Washington *(55,000)*	ERP *(SunGard IFAS)*, Utility Billing *(Springbrook)*		✓	✓	✓	✓		
City of Richland, Washington *(53,000)*	ERP *(Harris GEMS)*, Community Development *(Harris BluePrince)*, Utility Billing *(Harris Advanced Utilities)*	✓	✓	✓	✓	✓	✓	
City of Novato, California *(52,000)*	ERP *(SunGard HTE)*	✓	✓	✓	✓	✓	✓	
City of Manassas, Virginia *(37,000)*	ERP *(SunGard HTE and Daffron CIS)*	✓	✓	✓	✓	✓	✓	✓
City of Grants Pass, Oregon *(35,000)*	Utility Billing *(SunGard HTE)*		✓	✓	✓	✓	✓	✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Farmers Branch, Texas (33,000)	ERP and Community Development (SunGard HTE and MyGov)	✓						
City of Prior Lake, Minnesota (23,000)	ERP (UST Financials)	✓	✓	✓	✓	✓	✓	✓
Town of Herndon, Virginia (22,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
City of Waynesboro, Virginia (21,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
New Kent County, Virginia (18,000)	ERP (Bright and Associates (BAI))	✓	✓	✓	✓	✓	✓	
Arlington Public Schools, Virginia	ERP (Oracle E-Business Suite)	✓	✓	✓	✓	✓		

4.3 ERP Systems Experience

BerryDunn's team has knowledge of and firsthand experience with all of the major Tier 1 ERP systems and Tier 2 systems, which typically combine financial and HR functionality, as well as other administrative modules, in one integrated system. Table 3 describes BerryDunn's experience with Tier 1 and Tier 2 ERP software vendors, including those that BerryDunn reviewed as part of systems planning engagements and those that a client selected for implementation. It should be noted that in recent years, given current economic conditions, some vendors that were traditionally considered Tier 1 vendors have started pursuing clients in the Tier 2 market. The same can be said for Tier 2 vendors pursuing Tier 1 clients. As a result, it can be difficult to classify a vendor as strictly Tier 1 or Tier 2. Our experience assessing a wide variety of ERP vendors means that we understand the capabilities and limitations of today's systems.

Table 3: BerryDunn's Experience with ERP Vendors

Vendor	Description of BerryDunn's Experience
BS&A Software	BerryDunn has reviewed the software from BS&A in multiple system selection projects including an evaluation of land based software for the Village of Oak Park, Illinois, as well as for ERP software for the cities of Prior Lake, Minnesota and La Vista, Nebraska. Prior Lake subsequently selected BS&A as their preferred vendor and retained BerryDunn to provide Implementation Project Oversight assistance.
Caselle	BerryDunn reviewed Caselle as part of a needs assessment for the City of Buckeye, Arizona.
CGI, Inc.	BerryDunn has reviewed CGI as part of several systems planning projects for clients in the public sector. Our project for the City of Midland, Texas, focused on their use of CGI software. In addition, our proposed Project Manager is a former user of the CGI Momentum product.
Edmunds & Associates	BerryDunn has reviewed software from Edmunds & Associates as part of multiple systems planning projects including our work with the Town of Herndon, Virginia.
Infor	BerryDunn has reviewed Infor as part of needs assessment and system selection projects for the Cities of Boca Raton, Florida; Bloomington, Minnesota; and Santa Fe, New Mexico.
J.D. Edwards	BerryDunn has evaluated J.D. Edwards as part of several systems planning projects with public sector clients. We also provided ERP replacement consulting services to Sussex County, Delaware, which was originally a J.D. Edwards client. BerryDunn is currently providing ERP replacement consulting services to Washtenaw County, Michigan and the City of Santa Fe, New Mexico, both J.D. Edwards users.

Vendor	Description of BerryDunn's Experience
Lawson	BerryDunn provided independent Quality Assurance Oversight of the State of New Hampshire's Lawson ERP system implementation. We have also evaluated Lawson as part of our ERP system selection consulting work for the City of Sioux Falls, South Dakota, and Scott County, Iowa.
Microsoft Dynamics (formerly Great Plains)	BerryDunn has reviewed Microsoft Dynamics as part of several systems planning projects for clients in the public sector. Tampa Port Authority selected Microsoft Dynamics for its ERP system.
Oracle's E-Business Suite	BerryDunn has reviewed Oracle as part of several systems planning projects for clients in the public and private sectors. A systems planning project led by BerryDunn for a New England manufacturing firm resulted in the selection of Oracle. BerryDunn's system selection project for the Arlington County Public Schools also resulted in the selection of Oracle. In addition, we have helped clients to select complementary systems to interface with Oracle's E-Business Suite.
Pentamation	BerryDunn worked with the City of Fairfax, Virginia to identify opportunities for improving business processes in conjunction with the City's planned upgrade of Pentamation. As part of the project, BerryDunn team members received training on the software and gained significant understanding of its features and functionalities.
Performance, formerly KPMG (Harris)	BerryDunn has reviewed Harris products as part of several systems planning projects for clients in the public sector, including in our work for Sussex County, Delaware. Most recently, BerryDunn has been providing ERP consulting services to the City of Mesquite, Texas, relating to the replacement of their existing Performance system.
PeopleSoft	BerryDunn has reviewed PeopleSoft as part of several systems planning projects, including work with the State of Vermont, which resulted in the selection of PeopleSoft. We also provided IV&V of Massachusetts's PeopleSoft Human Resources system upgrade and are currently working with the City of Glendale, Arizona as they consider alternatives to replace their PeopleSoft software (HCM and SCM).
Sage	BerryDunn evaluated Sage as part of systems planning work with the Tampa Port Authority, as well as other projects.
SAP	BerryDunn conducted a project for the City of Toledo, Ohio, which involved evaluating the City's current environment, developing requirements, and providing recommendations related to the upgrade of its existing SAP software or replacement with another commercial system. The City chose to upgrade its existing software.
Springbrook (a division of Accela)	BerryDunn has reviewed Springbrook software, including cloud-based service offerings, with multiple clients.

Vendor	Description of BerryDunn's Experience
SunGard/HTE Government Systems	BerryDunn has worked with several clients, including the City of Sioux Falls, South Dakota, during the planning and implementation phases of replacing their SunGard/HTE systems. In this engagement, BerryDunn was hired to assist City staff in selecting a financial management system to replace its 17-year-old SunGard/HTE system. We have since been hired to provide project oversight during the City's implementation of its replacement ERP system. We are also working with the Cities of College Station and Pearland, Texas; West Jordan, Utah; Bloomington, Minnesota; and Manassas, Virginia (all SunGard/HTE clients), to provide ERP needs assessment and replacement planning services. We have additional experience with SunGard's IFAS and OneSolution products.
Tyler Technologies (Munis, New World, Eden, Incode products)	BerryDunn evaluated Tyler's software products including Munis, New World, Incode, and Eden as part of several systems planning projects, including Sioux Falls, South Dakota; Newport News, Virginia; the Cities of Pearland and Mesquite, Texas. We also served as the project manager in the City of Mesquite throughout the implementation of Munis. We are currently providing implementation oversight during the City of Pearland's New World implementation. We have also evaluated Tyler's Incode software as part of a Financial system selection project for the City of La Vista, Nebraska.

4.4 Strengths of Our Team

BerryDunn's proposed team members were selected as a reflection of the City's particular project needs and objectives. After reviewing the City's RFP, we believe that our team's proficiencies in the following areas are of greatest importance to the City in providing the services it has requested:

- Public Sector ERP Consulting for Large and Complex Organizations
- Project Management, Fact-Finding, and Facilitation
- Adaptability and Responsiveness to Changing Project Needs

In the following pages, we have provided a detailed account of our team members' qualifications in each of these areas.

Public Sector ERP Consulting Experience for Large and Complex Organizations

Our proposed project team has extensive experience providing consulting services throughout the entire lifecycle of ERP system evaluation and selection projects. Through the experience of numerous such engagements, we have developed a structured methodology, collaborative approach, and comprehensive project toolkit to lead the City through a successful system selection project. BerryDunn's team has knowledge of and firsthand experience with all of the most common Tier 1, 2, and 3 ERP systems on the market that the City of Gainesville may consider for its future environment. Having worked with organizations of varying complexity and

size, we have experience leading our clients through the complex decisions related to technology, process, and policy change.

Please reference the team member resumes provided in this section for detailed descriptions of work performed and results achieved in some of our ERP consulting engagements.

Project Management, Fact-Finding, and Facilitation

We have adopted Project Management Institute (PMI) best practices for all of our consulting engagements, based on the Project Management Book of Knowledge (PMBOK), version 5. Several members of our proposed project team are Project Management Professionals (PMP) and Certified Associates in Project Management (CAPM), designations of the Project Management Institute (PMI). We apply proven project management principles as set forth in the PMBOK and scale them to meet the needs of each engagement.

In addition, members of our team are certified as Green Belts in Lean Six Sigma, a set of quality management tools and techniques for process improvement. We may use elements of this methodology to improve the efficiency and output of our clients' business processes as they review their workflows, evaluate resources, or prepare for technology investments, such as a new system or an upgrade.

Every ERP consulting project conducted by BerryDunn includes a detailed fact-finding phase. The members of our team have experience collecting information from stakeholders across all affected functional areas through a multilayered approach that includes a review of existing documentation, Web surveys, and on-site interviews and observation. Conducting these processes through an iterative method allows us to refine each level of our fact-finding, which means we can identify trends and focus on areas of greatest significance to the City. This results in a clear understanding of the City's current business and ERP environment, processes, challenges, and opportunities. In turn, this allows us to provide customized guidance as the City considers its vision for its future ERP.

Our team is comprised of experienced facilitators who know how to listen, engage stakeholders, resolve conflicts, and keep discussions on track. We understand municipal personnel's time is limited and we use our meeting and facilitation skills to make best use of stakeholders' time in gathering, documenting, and validating business requirements.

Adaptability and Responsiveness to Changing Project Needs

BerryDunn has conducted many public sector engagements similar in size and scope to the services requested by the City. We understand the importance of applying a structured methodology to a project of this magnitude. However, we pride ourselves on being flexible and adaptable to the unique needs of each client. Our experienced team will work with the City during initial project planning to customize our approach and work plan to the resources and constraints of the City of Gainesville. Throughout the project, we will work collaboratively with the City to adjust the work plan as priorities and circumstances shift. Every member of our

proposed project team has experience in effectively adapting to change over the course of multi-year projects in order to ensure their success.

Our 90-person Government Consulting Group is comprised of experienced management and IT professionals with a wide range of backgrounds, including a former Municipal IT Director, CIO, and government budget, IT, and procurement staff. If the City's project requires, we may call upon consultants with specific expertise in areas such as IT assurance, information security, financial risk control, health and human services, regulatory compliance, benefits administration, utilities, community development, and government procurement.

We encourage the City to speak with our prior client references regarding our adaptable approach and strategic use of our firm's subject matter expertise.

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.
Please refer to the table on the following page.

Company Name: Berry Dunn McNeil & Parker, LLC

Authorized Signature & Title: _____ Principal

Print/type Name as Signed Above: Charles Snow   Date: 9 / 22 / 16

4.6 Team Member Roles and Responsibilities

A team of professionals from BerryDunn's Government Consulting Group will be responsible for providing the proposed ERP system consulting services to the City. Our proposed team, introduced in Table 4, offers experience in public sector system evaluation, planning, procurement, and implementation; facilitation of workgroups comprised of personnel from across all departments; and demonstrated written and verbal communication skills. Moreover, we have made every effort to assemble team members with specialized expertise in the City's requested functional areas.

Table 4: Overview of Team Member Responsibilities

Project Role/Name/Title	Responsibilities	Representative Projects and Roles
Project Leadership		
Project Principal Chad Snow, PMP, CFE *Principal*	As project principal, Chad will have overall responsibility for the services provided to the City, ensuring that the City's project goals and objectives for the project are met. Prior to joining BerryDunn in 2006, Chad worked for an ERP system vendor, where he provided in-depth demonstrations on ERP, revenue, and public safety applications to prospective government clients. Chad is an expert in the full lifecycle of planning for and procuring a new ERP system, having assisted cities, counties, and school districts across the county with their ERP replacements initiatives. He has managed every step of the process from assessing the current environment to conducting a needs assessment, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various ERP systems available in the market, as well as best practices in ERP business processes, and brings this insight to every engagement.	A sample of the client engagements on which Chad has served as Project Principal appear below: • City of Boca Raton, Florida • City of Homestead, Florida • City of Port Orange, Florida • City of Coral Springs, Florida • Hillsborough County, Florida • City of Tucson, Arizona • City of Surprise, Arizona • City of College Station, Texas • City of Irving, Texas • City of Midland, Texas • City of Grants Pass, Oregon • City of Pearland, Texas • Washtenaw County, Michigan

Project Role/Name/Title	Responsibilities	Representative Projects and Roles
Project Manager Ryan Doil, MBA *Senior Consultant*	Ryan is a senior consultant who will serve as the project manager for this engagement. In this role, he will act as primary liaison with the City and be responsible for maintaining a constructive and clear line of communication between the City staff and BerryDunn. In addition, he will monitor the progress of the project, track the initiation and completion of tasks and milestones, facilitate our on-site meetings and information gathering activities, and lead the development of project deliverables. Ryan has managed projects similar in scope and size to the services requested by the City for a number of BerryDunn clients, including ongoing engagement with the Cities of Santa Fe, New Mexico; Shoreline, Washington; and Novato, California to select replacement ERP systems. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects, such as the one planned by the City of Gainesville.	• City of Irving, Texas (Project Manager) • City of Boca Raton, Florida (Project Manager) • City of Santa Fe, New Mexico (Project Manager) • Washtenaw County, Michigan (Project Manager) • City of Grants Pass, Oregon (Project Manager) • City of Shoreline, Washington (Project Manager) • City of Novato, California (Project Manager) • City of Homestead, Florida (Lead Business Analyst) • City of Richland, Washington (Lead Business Analyst) • City of La Vista, Nebraska (Lead Business Analyst) • City of Tucson, Arizona (Lead Business Analyst)
Lead Business Analyst Adam Bates, MBA, CAPM, ITIL *Consultant*	Adam has extensive experience guiding similar organizations through system selection projects. In each, he has worked with all stakeholder groups to confirm current environment challenges and business drivers for the project, document future system requirements, and lead the client through a collaborative and structured system evaluation process. As lead business analyst, he will support the project manager in the facilitation of on-site meetings, the preparation of status reports, and ensuring the timely completion of all project deliverables.	• City of Benbrook, Texas (Lead Business Analyst) • City of Boca Raton, Florida (Business Analyst) • Henrico County, Virginia (Lead Business Analyst) • Village of Oak Park, Illinois (Project Manager) • Goochland County, Virginia (Lead Business Analyst) • Outagamie County, Wisconsin (Lead Business Analyst)

BerryDunn

Project Role/Name/Title	Responsibilities	Representative Projects and Roles
Implementation Lead Analyst Keith Damon, PMP *Manager*	Keith is a Manager in BerryDunn's Government Consulting Group who will offer his expertise as a Business Analyst with Subject Matter Expert in ERP Implementation for key tasks in Phases 1 and 4, including the development of project management documents and contract negotiation planning. Of particular importance to this project, prior to joining BerryDunn, Keith worked for Oracle and led numerous system implementations of the J.D. Edwards software throughout the country.	• City of Surprise, Arizona (Business Analyst) • City of Glendale, Arizona (Lead Business Analyst) • City of Mesquite, Texas (Project Manager) • City of College Station, Texas (Business Analyst) • City of Allen, Texas (Project Manager) • Washtenaw County, Michigan (Business Analyst) • Minnehaha County, South Dakota (Engagement Manager) • City of Rapid City, South Dakota (Project Manager) • Goochland County, Virginia (Business Analyst) • City of Santa Fe, New Mexico (Implementation Lead) • City of Boulder, Colorado (Project Manager) • City of Grants Pass, Oregon (Engagement Manager) • City of Pearland, Texas (Business Analyst)
Business Analyst Michael Woods *Consultant*	Michael is a consultant in BerryDunn's Government Consulting Group who will serve as a business analyst to meet specific project needs, such as research and fact-finding, facilitation of meetings with City personnel, and development of project deliverables. Michael has experience as a business analyst for multiple BerryDunn projects serving local government clients.	• City of Coral Springs, Florida (Business Analyst) • City of Midland, Texas (Business Analyst) • City of Glendale, Arizona (Business Analyst) • City of Irving, Texas (Business Analyst)

Project Role/Name/Title	Responsibilities	Representative Projects and Roles
Business Analyst Tam Ly, MPA *Senior Consultant*	Tam is a senior consultant in BerryDunn's Government Consulting Group who will serve as a business analyst to meet specific project needs, such as research and fact-finding, facilitation of meetings with City personnel, and development of project deliverables. As an experienced senior-level consultant and former municipal employee, Tam has led fiscal and operational evaluation engagements for municipal organizations across the country that resulted in significant monetary savings, as well as efficiencies in staff sourcing. He has applied his analytical and process evaluation skills across functional areas including finance, HR, public works, public safety, community development, and utilities.	• City of Coral Springs, Florida (Business Analyst) • City of Midland, Texas (Business Analyst) • City of Irving, Texas (Business Analyst) • City of Benbrook, Texas (Business Analyst) • Round Rock Independent School District, Texas (Business Analyst)
Technical Analyst Eddy Cheng, ITIL *Senior Consultant*	Eddy is an ITIL Foundation Certified Senior Consultant in BerryDunn's Government Consulting Group who will lead our team's technical assessment of the City's current ERP environment, including integration, data migration, and reporting needs. We will also leverage his skills as we develop technical requirements for the City's future system. Eddy will contribute his perspective both from consulting with local governments and as a former IT professional within Arizona state government.	• City of Glendale, Arizona (Technical Analyst) *Eddy's project experience with BerryDunn is supplemented by more than 15 years of IT leadership, primarily in Arizona State government.*

Project Role/Name/Title	Responsibilities	Representative Projects and Roles
Additional BerryDunn Resources	BerryDunn's team will also include consultant(s) and/or senior consultant(s) from BerryDunn's Government Consulting Group made up of 90 personnel. These resources will support the Project Team with efforts relating to fact-finding, research, and deliverable development as business analyst(s).	Our additional consultants are experienced in local government and collectively have served on teams for all projects identified in the preceding Section 4.2. These additional resources regularly work with the proposed Project Team and would efficiently integrate into the team if called upon for their respective subject matter expertise.

Our Local Government consultants routinely work in cohesive project teams and the team members proposed have worked together on several similar ERP system selection projects for BerryDunn clients across the country. In this way, we are able to provide focused guidance during each key stage of the project while maintaining seamless delivery of our services to the City.

4.7 Team Member Resumes

We have provided detailed resumes for our proposed team members that provide a summary of their most relevant experience, as well as their roles in key prior and ongoing public sector business process and systems consulting projects. Should the City desire additional information on any of the clients noted, or wish to speak with them regarding BerryDunn's performance, we would be happy to provide their contact information upon request.

CHAD SNOW ◆ PRINCIPAL ◆ PMP, CFE

Portland, Maine Office

Chad has more than 18 years of experience working with local government agencies and extensive experience assisting public sector clients with project management, technology planning, business process improvement, system implementation and design, and Enterprise Resource Planning (ERP) systems.

Prior to joining BerryDunn in 2006, Chad worked for an ERP system vendor, where he provided in-depth demonstrations on ERP, revenue, and public safety applications to prospective government clients. He also served as a Police Officer for the City of Saco, Maine for ten years.

Qualifications and Experience

✓ **Project Management:** Chad has extensive experience in managing the planning, selection, and implementation of a variety of ERP systems for over 20 clients across the country, as well as a number of business process improvement, information technology strategic planning, and organizational analysis projects. His expertise informs and guides his team's project management, issue/risk management, change management, and communication management methodologies.

✓ **Enterprise Systems Planning:** Chad is an expert in the full lifecycle of planning for and procuring a new ERP system, having assisted cities, counties, and school districts across the county with their ERP replacements initiatives. He has managed every step of the process from assessing the current environment to conducting a needs assessment, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various ERP systems available in the market, as well as best practices in ERP business processes, and brings this insight to every engagement.

Education

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

Certifications

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

Professional Affiliations

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

Prior Organizational Experience

Tyler Technologies, Munis Division: Chad worked for Munis, a vendor of government ERP, revenue, and public safety applications for six years. In this role, he provided in-depth demonstrations to over 25 municipal, county, and state agencies, as well as conducted gap-fit analyses and developed business process recommendations to meet the needs of his ERP implementation clients.

Chad's Key Clients

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

- Hillsborough County, Florida
- City of Tucson, Arizona
- City of Surprise, Arizona
- City of Pearland, Texas
- City of Midland, Texas
- City of Mesquite, Texas
- City of College Station, Texas
- City of Bloomington, Minnesota

- Tampa Port Authority
- City of West Jordan, Utah
- City of South Jordan, Utah
- City of Louisville, Colorado
- City of Alexandria, Virginia
- City of Rapid City, South Dakota
- City of Cambridge, Massachusetts

BerryDunn

RYAN DOIL ⬧ SENIOR CONSULTANT ⬧ MBA

Portland, Maine, Office

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

Qualifications and Experience

✓ **Project Management:** Ryan has managed projects similar in scope and size to the services requested by the City for a number of BerryDunn clients, including an ongoing engagement with the City of Santa Fe to select a replacement ERP system. He also led a business process review project for the Fairfax-Falls Church Community Services Board in Virginia. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects.

✓ **ERP System Selection:** Ryan has extensive experience leading similar organizations through ERP system selection projects. In each, Ryan has worked with all stakeholder groups to confirm current environment challenges and business drivers for the project, document future system requirements, and lead the client through a collaborative and structured system evaluation process.

✓ **Public Sector Procurement:** During his time with the United States District Court of Maine, Ryan served as the Court's facilities and procurement specialist. Ryan was the project manager for a current BerryDunn engagement to conduct an in-depth review of the procurement processes at ecomaine, a quasi-municipal organization located in Portland, Maine. The focus of this project was to develop recommendations for improvement in controls, processes, software systems, staffing, organization, and documentation, as they relate to the procurement process.

Education

❖ MBA, University of Southern Maine

❖ BA, Political Science and History, University of Vermont

Prior Organizational Experience

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

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

Ryan's Key Clients

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

- City of Boca Raton, Florida
- City of Novato, California
- City of Santa Fe, New Mexico
- City of Tucson, Arizona
- City of Surprise, Arizona
- City of Mesquite, Texas
- Fairfax Community Services Board, Virginia
- City of Irving, Texas
- City of Shoreline, Washington
- City of Pearland, Texas
- ecomaine, Portland, Maine
- Albemarle County, Virginia
- Washtenaw County, Michigan
- Minnehaha County, South Dakota
- City of La Vista, Nebraska

BerryDunn

ADAM BATES ◆ CONSULTANT ◆ MBA, CAPM

Portland, Maine Office

Adam is a Consultant in BerryDunn's Government Consulting Group with experience as a business analyst for several projects serving municipal clients. He has contributed to these projects on a variety of levels including analysis, workflow management and project deliverable development.

Qualifications and Experience

✓ **Business Process Documentation:** Adam has provided business process review, mapping, and documentation services for a number of BerryDunn's local clients, including fact-finding activities to understand the current environment.

Prior Organizational Experience

The First Bancorp, Inc.: Adam performed yield analysis and financial analysis for investments in the Bank's municipal bond portfolio, as well as reporting on bond statements, financial highlights, and S&P ratings. Each analysis resulted in the development of a report that was sent to the Chief Financial Officer (CFO).

Eastern Maine Healthcare Systems: Adam provided analytical support to System leadership on topics ranging from IT strategic initiatives to debt restructuring RFPs. In addition, he developed an investment reporting tool that served as the foundation for the organization's performance review analysis. The investment reporting tool required fact-finding meetings with department staff to obtain the necessary documents, learn about the various investment funds, and any previous investment reporting projects at EMHS.

Delhaize America: Adam performed analysis of the coffee, corn, sugar, and wheat commodity markets, including market volatility and macroeconomic trends, to support purchasing decisions and hedging with futures and options. He maintained all hedging transaction records for compliance.

Education

❖ MBA, University of Maine

❖ BA, Business Administration, Political Science and History, University of Maine

Certifications

❖ Certified Associate in Project Management (CAPM), Project Management Institute

Adam's Key Clients

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

- City of Tucson, Arizona
- City of Surprise, Arizona
- City of Pearland, Texas
- City of Mesquite, Texas
- City of Santa Fe, New Mexico

- City of La Vista, Nebraska
- City of South Jordan, Utah
- City of Waynesboro, Virginia
- City of Manassas, Virginia
- City of Alexandria, Virginia

KEITH DAMON ◆ MANAGER ◆ PMP

Portland, Maine Office

Keith is an experienced project manager with over 12 years of experience working with public sector agencies to manage enterprise applications. As a project manager for the public sector group within J.D. Edwards, he worked exclusively with government customers. Complimenting this experience, Keith has 17 years' experience working in municipal government as an IT Director. He has significant management experience within large and diverse government organizations, uniquely qualifying him to assist BerryDunn's government clients.

Qualifications & Experience

- ✓ **Enterprise-Wide System Implementation:** Keith has more than 15 years of experience in the project management of public sector system implementations from the client's, vendor's, and consultant's perspective. As an Engagement Manager for Oracle, he assisted dozens of public sector organizations in implementing their systems and he has provided implementation planning and management services to multiple BerryDunn ERP consulting clients including the Cities of Mesquite, Texas; Allen, Texas; and Rapid City, South Dakota.

- ✓ **Project Management:** Keith has extensive experience in managing, planning, and implementing ERP systems, both as the customer and as the vendor. This perspective and insight benefits our ERP consulting clients across the country. He has led many business process improvement activities, strategic planning sessions, and assisted with organizational change management, which is a critical success factor for any large-scale implementation project.

- ✓ **Public Sector IT Management:** Keith brings a wealth of knowledge in the management of municipal IT operations from his prior role as IT Director for the City of Keene, New Hampshire. He was responsible for all aspects of the City's IT environment, including staffing, training, hardware, software, policy, support, and the

Education

- ❖ BS, Computers and Management, Franklin Pierce College

Certifications

- ❖ Project Management Professional (PMP), Project Management Institute

selection, implementation, change management, and maintenance of all City systems.

Prior Organizational Experience

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

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

Keith's Key Clients

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

- City of Surprise, Arizona
- City of Mesquite, Texas
- City of College Station, Texas
- City of Allen, Texas
- Washtenaw County, Michigan

- Minnehaha County, South Dakota
- City of Rapid City, South Dakota
- City of Jackson, Mississippi
- City of Nashua, New Hampshire

MICHAEL WOODS ⬥ CONSULTANT

Portland, Maine Office

Michael Woods is a consultant with BerryDunn's Government Consulting Group, working with public sector clients. His focus includes helping clients with data analysis, system implementations, and needs assessments.

Qualifications & Experience

✓ **Stakeholder Communications:** Through his work on BerryDunn's system consulting engagements, including BerryDunn's current project with the City of Midland, Michael has developed a structured and collaborative approach to managing communication across departments and functions. This includes the facilitation of fact-finding meetings to build understanding of client's further environment, solicit input from a variety of stakeholders, and encourage buy-in for future recommendations and systems.

Prior Organizational Experience

Aurora Financial: In his role as a Financial Analyst Intern, Michael maintained portfolio strategies for clients, conducted fundamental analyses of equities and other securities, evaluated risk, researched emerging sectors and industries, and addressed client concerns regarding equity selection. His client-facing responsibilities included developing investment strategies that aligned with a client's financial goals, risk tolerance, and ethical beliefs.

Education

❖ BS, Economics, University of Maine

Michael's Key Clients

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

- City of Coral Springs, Florida
- City of Irving, Texas
- City of Midland, Texas
- City of Sioux Falls, South Dakota
- City of Santa Fe, New Mexico

BerryDunn

TAM LY ◆ SENIOR CONSULTANT ◆ MPA

Phoenix, Arizona, Office

Tam is an experienced former municipal government professional and school administrator with expertise in budgeting, special projects management, program evaluation, and sourcing optimization.

Qualifications and Experience

✓ **Program Optimization:** As an experienced senior-level consultant Tam has led fiscal and operational evaluation engagements for municipal organizations across the country that resulted in significant monetary savings, as well as efficiencies in staffing sourcing. He has applied his analytical and process evaluation skills across functional areas including finance, HR, public works, public safety, community development, and utilities.

✓ **Financial and Budget Analysis:** Tam is skilled in government budgeting, financial planning, and economic forecasting from both the administrative and consultative perspective. As a Finance and Budget Analyst for the Town of Wellesley, Massachusetts he prepared a $100M annual operating budget and Capital Improvement Plan (CIP). He is also well-versed in how people, process, and technology interact in municipal finance.

Prior Organizational Experience

Criterion Associates: As a Senior Consultant for a municipal consulting firm that serves public safety organizations, Tam provided fiscal planning, analysis, and program evaluation services to clients nationally. He led projects that optimized service delivery including significant fiscal savings for clients resulting from business process management (BPM) analyses.

Northern Lights School: As President and Trustee of a private Waldorf-based elementary and pre-school, Tam oversaw all non-instructional activities including finances, operations, enrollment, marketing, and volunteer management. During his tenure, he led a successful bid to provide third-party UPK services to a local public school district, making Northern Lights the first Waldorf-based

Education

❖ MPA, Public Administration & Finance, Suffolk University

❖ BA, Anthropology, Bates College

school in New York State to provide this service. He achieved a 50% enrollment and 25% tuition revenue increase in his first year as President and increased balance sheet reserves by 200% in his two years in the role.

Town of Wellesley, Massachusetts: Tam was responsible for coordinating and preparing a $100M annual operating budget and multi-year capital improvement plan for the Town. He implemented a private sector dashboard reporting format to simplify and summarize complex financial data and reporting for policy makers, senior managers and public. He also successfully migrated the Town's vendor management process from Excel to a Munis Enterprise Vendor Management System.

Matrix Consulting Group: As a Senior Consultant, Tam provided financial and operations planning and analysis for municipal clients. His engagements includes human resources classification, compensation, and staffing studies; public safety and public works operations and program evaluations; and survey design, application and analysis utilizing quantitative methodologies.

Eversource Co. (formerly NSTAR Gas & Electric Company): As a Senior Legal Assistant, Tam acted as project manager for regulatory transactional and adjudication efforts across multiple internal company departments, outside counsels, and consultants.

Tam's Key Clients
The following list is a representative sample of BerryDunn clients Tam has assisted with IT and management consulting engagements.

- City of Coral Springs, Florida
- City of Benbrook, Texas
- City of Irving, Texas
- City of Midland, Texas
- Round Rock Independent School District, Texas

BerryDunn

EDDY CHENG ◆ SENIOR CONSULTANT

Phoenix, Arizona, Office

Eddy's more than 15 years of technology management experience spans both the private and public sectors, including library, criminal justice, and administrative agencies at the state level. His experience in planning, executing, auditing, and reporting on enterprise-wide technology initiatives affords him an understanding of common challenges, success indicators, and key performance indicators that he leverages to advise his clients.

Qualifications and Experience

✓ **Business Case Development:** During his time with the Arizona Department of Administration, Eddy helped Arizona state government agencies to create, refine, and submit Program Investment Justifications (PIJs), or business case proposals, for technology projects. He then advanced to an internal consulting role, reviewing agency technology projects, tracking their progress, and measuring their benefits. His experience in each step of this technology implementation lifecycle helps him to align his clients' technology investments with their business goals for long-term success.

Prior Organizational Experience

Arizona Department of Administration: In his role as Enterprise Business Liaison, Eddy provided developed consultative relationships with agencies, boards, and commissions to support their technology planning and investments. He reviewed and reported on major development projects, ensuring that they aligned with each organization's strategic technology plan and supported a specific business case. The objective of his work was to assist agencies in planning, executing, and tracking technology initiatives to ensure that was being added.

In his previous role with the Department, as a Program Oversight Manager, Eddy directly assisted his assigned state agencies with developing and submitting Program

Education

❖ BS, Business Administration and Management Information Systems, University of Arizona

Certifications

❖ Microsoft Certified Professional (MCP)
❖ State of Arizona Project Management Certification
❖ Information Technology Infrastructure Library (ITIL) Foundation Certified

Investment Justifications (PIJs) for technology projects, as well as monitor ongoing PIJ projects to keep them on budget and on schedule.

The Ellman Companies: As Director of Information Technology, Eddy managed the conversion of the company's computer infrastructure to a virtualized environment. He reviewed and negotiated technology support contracts and oversaw all IT purchases and implementations. He had responsibility for the company's infrastructure, network, system security, and database maintenance.

Arizona State Library, Archives and Public Records: As Chief Technology Officer, Eddy supervised both network and software development; the preparation and submission of E-Rate grants; the technological infrastructure of a new archives building; and the migration to a VoIP telephone system. He was responsible for a technology budget of more than $500,000.

Arizona Criminal Justice Commission: Eddy, as the Information Technology Manager, managed the development of the Commission's website, assisted rural law enforcement agencies in evolving their technology, led statewide criminal justice records integrations, and performed technical audits of law enforcement agencies receiving grant funding from the Commission.

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:_____
   ADDRESS:_____
   _____
   TELEPHONE: (_____) _____Email:_____
   CONTACT NAME: _____
   DATE OF COMPLETION OF PROJECT:_____
   CONTRACT AMOUNT: $_____

2. CUSTOMER NAME:_____
   ADDRESS:_____
   _____
   TELEPHONE: (_____) _____Email:_____
   CONTACT NAME: _____
   DATE OF COMPLETION OF PROJECT:_____
   CONTRACT AMOUNT: $_____

3. CUSTOMER NAME:_____
   ADDRESS:_____
   _____
   TELEPHONE: (_____) _____Email:_____
   CONTACT NAME: _____
   DATE OF COMPLETION OF PROJECT:_____
   CONTRACT AMOUNT: $_____

4. CUSTOMER NAME:_____
   ADDRESS:_____
   _____
   TELEPHONE: (_____) _____Email:_____
   CONTACT NAME: _____
   DATE OF COMPLETION OF PROJECT:_____
   CONTRACT AMOUNT: $_____

5. CUSTOMER NAME:_____
   ADDRESS:_____
   _____
   TELEPHONE: (_____) _____Email:_____
   CONTACT NAME: _____
   DATE OF COMPLETION OF PROJECT:_____
   CONTRACT AMOUNT: $_____

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