BerryDunn Project Update

City of McKinney – Council Workshop

Enterprise Resource Planning (ERP) Software Project

Tuesday, April 2, 2019

Agenda

1. Introductions

2. BerryDunn Overview

3. Project Goals and Objectives

4. System Selection Phase Overview

5. Staff Participation

6. Evaluation Process

7. Questions and Discussion

Introductions

Chad Snow, PMP, CFE
Principal

Keith Damon, PMP, ITIL, Prosci® CCP
Manager

BerryDunn Overview

40 PRINCIPALS

390 EMPLOYEES

300 GOVERNMENT CLIENTS

ARIZONA CONNECTICUT MAINE NEW HAMPSHIRE WEST VIRGINIA

We are a public accounting and management consulting firm providing a full range of services, including IT consulting; system selection; and audit, accounting, and tax services.

We are independent advisors and provide recommendations that are in the best interest of the City.

ICMA

URISA

PMI Project Management Institute

APWA AMERICAN PUBLIC WORKS ASSOCIATION

GFOA

ALLIANCE FOR INNOVATION TRANSFORMING LOCAL GOVERNMENT

ICC INTERNATIONAL CODE COUNCIL

APA American Planning Association

TOP 100

"Top 100" and "Fastest growing" ranking from *INSIDE Public Accounting* since 2011

100

BerryDunn Overview

Project Goals and Objectives

- Solicit participation from City of McKinney (City) staff, gathering input from all stakeholders **(open and participatory)**

- **Collaboratively** define requirements that meet the current and future needs of the City

- Utilize a **structured** approach to manage resource availability and help ensure project success

- Select a modern, full-featured Enterprise Resource Planning (ERP) system that will provide **accurate, timely, reliable, and trusted** data

- Enable City staff to be better at doing what we do **(empower staff)**

- Provide enhanced report-writing tools **(improved department data)**

- Enhance the ability to extract data from the ERP system **(improved management-level data)**

System Selection Phase Overview

✓ Project Planning – May 2018

✓ Kickoff and Fact-Finding Sessions – July 2018

✓ Pre-RFP Vendor Demonstration – September 2018

✓ Joint Requirements-Gathering Sessions – October 2018

✓ RFP Development – March 2019

❖ Vendor Demonstrations

❖ Reference Checks and Site Visits

❖ Vendor selection

Staff Participation

❖ Fact-Finding Participation Rate

  ✓ **203** survey responses

  ✓ **22** meetings over three days, with **over 110 City staff members** attending one or more meetings

❖ Pre-RFP Vendor Demonstrations

  ✓ Purpose – help City staff understand functionality available in today's marketplace

  ✓ Voluntary vendor participation

  ✓ **Six** Sessions scheduled over three days

  ✓ Sessions conducted online via Skype

Staff Participation

❖ Joint Requirements Gathering Meetings

  ✓ **17** meetings over three days, with **over 319 City staff members** attending one or more meetings

Functional Area	Number of Requirements
General and Technical	224
General Ledger and Financial Reporting	160
Budget	175
Purchasing, Bid, and Contract Management	256
Accounts Payable	180
Accounts Receivable and Cash Receipts	178
Project Accounting and Grant Management	145
Human Resources, Personnel Management, and Benefit Administration	283
Time Entry, Attendance, and Payroll	451
Fleet Management	101
Fixed Assets and Inventory	164
Work Orders	89
Facility Management	64
Utility Billing	330
eGovernment	63
Interfaces	45
Data Conversion	29
Total Functional Requirements:	**2,937**

Staff Participation

CITY OF MCKINNEY

Request for Proposals for Software and Implementation Services for a Utility Billing, Asset Management, and Enterprise Resource Planning (ERP) Software Systems Environment
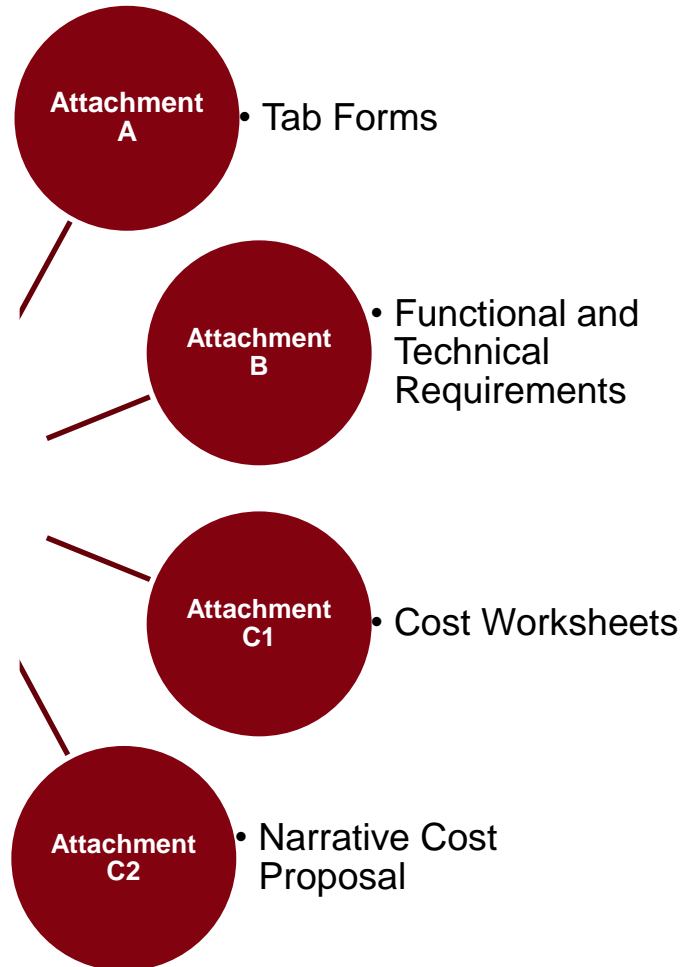
RFP No: 19-20RFP

VENDORS ARE STRONGLY ENCOURAGED TO READ THE ENTIRE SOLICITATION.

All questions concerning the RFP **must** be submitted via email only, to the City's consulting partner, Ryan Doil with BerryDunn (rdoil@berrydunn.com), as identified within this solicitation in Section 1.9. Communications with City staff may disqualify you from the evaluation process.

The City of McKinney exclusively uses IonWave Technologies, Inc. (McKinney eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid/proposal non-compliant. McKinney accepts no responsibility for the receipt and/or notification of solicitations through any other means.

Attachment A
- Tab Forms

Attachment B
- Functional and Technical Requirements

Attachment C1
- Cost Worksheets

Attachment C2
- Narrative Cost Proposal

Evaluation Process

Vendor Proposals Received

Evaluation Committee review of written proposals ("*Can vendors do it?*")

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Short-List Vendor Identification Meeting

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Vendor Demonstration Process

On-site software demonstration process for all project participants ("*How can vendors do it?*")

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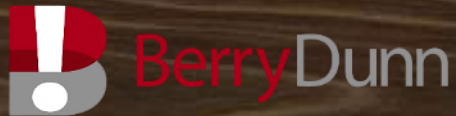**Finalist Vendor Identification Meeting**

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Reference Checks and Site Visits

Discussions with peer organizations ("*Where and how well have vendors done it?*")

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Preferred Vendor Identification Meeting

Questions and Discussion?

BerryDunn

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Portland, Maine 04101

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