

**CITY OF BEL AIRE, KANSAS**

Request for Proposals  
For  
ERP Software System  
**ERP RFP 2023**

**LIFE'S** ***better*** **ON THE EDGE!**

## Introduction

The City of Bel Aire (the City) is issuing this Request For Proposal (RFP) for the purpose of soliciting vendor proposals for a comprehensive Municipal ERP solution to serve the current and projected needs of the City. Invitation for bids will be sent out to knowledgeable vendors who are known to have adequate expertise.

The City's programs, services, employment opportunities, and volunteer positions are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, or political affiliation.

Before submitting a proposal to the City, vendors replying to this RFP (hereinafter "Vendor" or "Proposer") shall examine the specifications to understand all existing conditions and limitations. The City requests proposals only from Vendor/Proposers who have broad experience with governmental agencies, preferably from Vendor/Proposers who provide software and services only to the public sector, and who are experienced in Financial, Payroll, Utilities, and HR implementations.

The City is seeking the best solution, based on the representative criteria contained in this RFP, for its ERP needs. The successful vendor(s) will seek to establish a turnkey, integrated hardware/software environment for the City, which will satisfy the specifications contained in this RFP, bringing to bear whatever vendor resources are required from the areas of computer systems hardware, software, technical training, conversion, maintenance, and services support.

Criteria for selection will be based on experience, level of fit of the proposed system based on the City's functional and technical requirements, implementation approach, product demonstrations, reference checks and price. The selection process will be conducted in accordance with the RFP and will be led by an in-house project and evaluation team. Vendors shall present 3 references for similar projects for the City to contact-ideally Kansas customers.

The City desires to contract with a single vendor for all hardware and software and hardware/software maintenance, installation, conversion, and support. However, the City reserves the right to evaluate each software application module on its own standard of performance, regardless of whether other or remaining application modules of the Vendor are considered by the City. The City reserves the right to award the system to any one Vendor or a combination of Vendors. In addition, the City reserves the right to purchase any personal computers needed from an alternate vendor.

The City will receive Proposals in the office or emailed to **Ted Henry (thentry@belaireks.gov), Director of Finance, 7651 E Central Park Ave., Bel Aire City, KS 67226, up to the hour of 5:00 p.m. on the 31st day of October 2023.** Label the outer envelope/package or email subject line "ERP RFP 2023".

Late proposals will be disqualified. Proposals submitted must be binding for no less than ninety (90) days after the date received. It is the responsibility of the Vendor to deliver the proposal in accordance with these instructions contained above and/or elsewhere in the RFP.

The City will select the proposal, or combination of proposals, that, in its opinion, is in the best interest of the City. The City reserves the right to reject any or all proposals or portions of a proposal. The City also reserves the right to waive minor technicalities in the proposal. The City not only reserves the right at the sole discretion of the City to reject any or all proposals and to waive technicalities, but also reserves the right of evaluation and the right to determine the methodology for evaluation of the proposals to

determine which is the best proposal. In addition, to accept the proposal (or proposals) deemed to be in the best interest of the City, i.e., the most qualified proposal will not necessarily be the proposal with the lowest cost. Further, the City reserves the right to accept a proposal (or proposals) for any or all items separately or together.

## **Purpose of Request for Proposal (RFP)**

The City is seeking a proven Municipal ERP system to replace its existing systems, including core financials, payroll and Utility Billing, Code Enforcement, Contractor licensing/ Construction Permitting/Inspections, Solicitor and Business licensing, Recreation, and Court. Also subsystems Online Bill Pay, Payment Kiosk, Interface to Digiticket, Interface to Sensus, Interface to State Court, Web API to interface with Laserfiche, report writing system, (referred to hereafter as Systems.)

In summary, the City prefers that the Solution be developed, implemented, and supported by one Vendor/Proposer, or by one Vendor/Proposer in conjunction with a minimum of third-party vendors. The City prefers that the proposed software Solution be Software as a Service (Cloud Platform). Submitters may propose SaaS, including disaster and recovery services.

The City has specific requirements for the proposed ERP system requested, including full and seamless integration between the ERP applications (resulting in decreased redundancy and duplication of entries); reporting with the ability for analysis; Internet capability/Web access.

The **Finance** department intends to utilize a full Financial Accounting solution for the purposes of performing multi-fund accounting utilizing due to-due from methodology. The City prefers an accounting solution that provides Web-based access with role-based security and single sign on capability; period updates of the Solution; and particular application-specific functionality including versatile budgeting with the ability to create scenarios, multi-year and forecasting; vendor/bid management.

The **Payroll /Human Resources** department of the City intends to utilize a Payroll solution that provides the option for an employee portal; and electronic timesheet entry and management.

The **Utility** department of the City intends to utilize a Billing solution that provides customers opportunity to see account history, request services or changes to services, request work orders, make payments and securely store payment information, and receive city communications and via an online portal.

## **The City's Project Goals**

The City intends to implement a Solution that will integrate with existing operations and business applications, containing enhanced features and functionality to support increased automation and operational efficiencies.

## **The City's Project Objectives**

The City's objectives of implementing an ERP Solution include but are not limited to:

- Increased employee service levels, including access and responsiveness through a Web based, secure self-service application;
- Features that allow for greater staff efficiency and return on effort such as integrated applications, the ability to enter data once across Financial, Payroll, HR, Court, Code Enforcement, Utility Billing and other applications to guard against clerical errors and data redundancy and ensure increased data

integrity, electronic document management to increase efficiency and cost effectiveness, and dashboards for customizable and easily accessible desktops;

Enhanced, user-friendly, robust reporting capabilities to improve decision making

- Automated and streamlined business practices through built-in workflow and after-hours scheduling functionality for routine or time-consuming processes and/or reports;
- Elimination or minimization of mission-critical data being stored in external spreadsheets or databases;

A complete, vendor-supported system that is delivered on-time and within budget, preferably by Vendor/Proposer's in-house implementation staff

- Ongoing system viability and support by the Vendor/Proposer, including minimally-disruptive annual upgrades and enhancements at little or no additional cost to the City;
- A partnership with a Vendor who offers easily-accessible and fully trained teams for product support, as well as a Vendor who offers their client base the opportunity to participate in beta or similar testing for future product releases;
- A long-term business solution and partnership (preferably one that will serve the City well for 15 or more years) with a financially and technologically-viable and stable vendor with a long history in the public sector area, and who supports continual innovation and progression of the City's practices, services and applications;
- In addition, several ancillary applications that could be proposed may be considered, including but not limited to: Software as a Service (preferably hosted by Vendor/Proposer);
- At a minimum, the software must:
  - Be a fund accounting system designed for municipal office users such as the City;
  - Provide online Help within the Solution;
  - Have annual or other data-entry related step-by-step programs to facilitate processes such as new employees, employee changes, and W-2 entry;
  - Meet the user set up, configuration, operation, and reporting standard set by software systems commonly used by municipal organizations similar in size and scope to the City;
  - Have automated reporting capabilities that meet the requirements for State of Kansas and federal tax reporting;
  - Have standard reporting capabilities such that the City's budget can be printed and reported in the format recommended by the State of Kansas
  - Vendor will supply recommendations for additional hardware required, including, but not limited to large format printers, receipt printers, credit card terminals, etc.

## **The City's Current Software Environment**

Since 2001 the City has used Simple City as the core ERP application. The City also utilizes several ancillary software applications, some developed in house and others provided through a variety of software vendors. Because of these disparate systems, all applications are not fully integrated and the City is required to maintain multiple systems in order to meet the intended business objectives. In

addition to seeking a Solution that is fully integrated, the City intends to implement a Solution that provides more robust processing, reporting and scheduling functionality including workflow and Best Business Practices.

After an analysis of the City's current business practices, the City has identified multiple areas of concern, including:

### **[ERP] System**

- Data entry is redundant. This duplication of data entry and potential for input error has led the City to seek an integrated solution that has been specifically designed for ERP for the public sector, specifically cities.
- The City uses several solutions to meet its management and technology needs.
- Time tracking is done in a spreadsheet format and includes several methods of collection
- Reporting is limited.
- System reports are limited, so users can't readily get the information they need without running multiple reports, or producing a custom report
- Payroll registers and supporting documents are printed timesheets, time-off requests, reports and journals that travel among multiple departments throughout the payroll process, before being scanned into permanent record retention.
- Many manual processes are in place to do day-to-day activities that should be able to be done on a computer system (including manual paperwork, forms, and spreadsheets).
- The City's current ERP solution, Simple City, contains the current applications: Finance, Utility Billing, Payroll, Court. Plus, third-party vendors that manage Backflow Management, Code Enforcement, Contractor licensing and permitting, Inspections, Work Orders, Fleet Management, Online Bill Pay, Interface to Digiticket, Interface to Sensus, Interface to State Court, report writing system, (referred to hereafter as Systems.) Currently the City does not have a software or electronic-based solution for Recreation. Vendor should provide a check list of their software versus owned Simple City applications to insure there are no gaps in service.

## **The City's Current Technology and Hardware Infrastructure**

### **Information Technology Structure**

The mission of the City's Information Technology Center is to provide innovative and cost-effective solutions to achieve the City's technology service goals and objectives. The IT Center strives to provide the highest quality of services for a vast spectrum of technology needs from network infrastructure, IT security, and client hardware and software support to application development, project management and system implementation.

The City contracts Imagine IT for technology support, and is responsible for all technology and IT-related programs and issues, including but not limited to:

- Managing the organization's hardware, software and physical communication;
- Providing a source of guidance for technology issues for staff and associated organizations;
- Maintaining information security and availability;
- Basic computer support and repair for the City;
- Providing a corporate perspective on information technology initiatives; and
- Data management, server maintenance, network communication, guidance and infrastructure management to deliver meaningful information.

## Scope of Services

The City is seeking a comprehensive, fully integrated COTS ERP that provides specific capabilities across all proposed modules.

The response "checklist" identifies selected key features, functions and capabilities that the City is seeking from the new Solution. Vendor/Proposer shall indicate compliance with each requirement to enable the City to evaluate the proposed Solution. The precise Scope of Services to be incorporated into the final Contract will be based upon the above-noted items and may be subject to negotiations between the City and the successful Vendor/Proposer.

In summary, the City expects that the Vendor/Proposer understands the following, and the Vendor/Proposers Scope of Services should include, at a minimum:

- A general discussion of the Vendor/Proposer's understanding of the overall project, a description of the major components or phases of services, and the expected time of completion for each component proposed.
- A description of the software products or modules, licensing options, any customization, operating system and database, and any third party software products included in the proposal that are necessary to achieve the City's stated Project Objectives, and to meet the functional requirements. Vendor/Proposer may include any software product modules, third party software, or hardware in its proposal that are value-added or optional to be provided by Vendor/Proposer to the City.
- Information on the recommended delivery method for the proposed software solution (on-premise or Vendor/Proposer hosted Software-as-a-Service).
- A description of the standard and ad-hoc reporting capabilities of the proposed solution.
- Methodology and frequency for software upgrades and update releases, and services associated with maintaining the software, including the option to load annual enhancements and upgrades via the Web.
- Vendor/Proposer's source code policy, if any.
- Description of any post-implementation and ongoing support for the ERP systems, including any levels of support available and which level is being proposed for the City. Include telephone support information (hours of operations and time zone), online capabilities (email and/or online, Web-based community forum options); as well as problem reporting, resolution and escalation procedures, response times for the levels of severity, and other support that may be available (online help, knowledgebase, user groups, conferences, etc.).
- Services that shall include installation of software, project management, implementation, data

conversion, system acceptance testing, training, warranty and documentation. It is preferred that all of these services are provided solely by Vendor/Proposer's own staff and not third-party providers.

- All hardware required to operate the proposed Solution in an optimal environment. the City will purchase any hardware needed through a separate procurement process.

Specifically the proposed Solution must provide:

- Transactions that are processed in real-time and immediately available for inquiry and reporting.
- A fully integrated system of ERP applications, where shared data is entered only one time.
- A content management component that is fully integrated across the entire Solution.
- Robust workflow across all appropriate modules.
- Reporting that is intuitive and user friendly yet robust, allowing staff to create and/or obtain "standard" or "canned" reports with minimal training; and to create analytical reports for decision-making capabilities.
- Robust audit and transaction logging capabilities.
- Solution should support customer interaction for payment of fees/utility usage through a web interface or interface of a City-owned kiosk
- Solution should interface with Digiticket to provide Court with citation information.
- Web API to interface with Laserfiche

## **SOFTWARE TO BE INCLUDED**

Accounting (GL, Budget, Inventory, Fixed Assets, Contract Management, Project and Grant Accounting, Cash Management, Purchasing/Request/Bidding/Vendor management)

Payroll, Human Resource Management including an employee portal and time tracker, applicant tracking.

Planning and Zoning Management including module(s) for Contractor Licensing, Building Permitting Management, Inspections, Contractors Payment Portal

Utility Billing Management including customer portal, cashiering and online payment solutions, interface with city pay kiosks, and online utility billing systems, interface with Sensus and Sensus AMI.

Work orders, Fleet and Facility Management

Court Management that interfaces with Digiticket and State Court System

Recreation Management

Code Enforcement

Backflow device Management (may be part of Utility Module)

## **SERVICES TO BE INCLUDED**

Project Management

Software installation

Data conversion Integration & interface development

Training

Ongoing support & maintenance services

Change management

Extended Consulting Services (optional)

Disaster Recovery

Software as a Service, or hosted, deployment (optional)

## **Submittal Requirements and Instructions**

The Proposer shall include in its proposal, at a minimum, the information outlined in this Section *Submittal Requirements and instructions* in a manner which demonstrates the Proposer's competence and qualifications for the satisfactory performance of services and delivery of software and other products identified in this RFP.

## **Vendor/Proposer Questions and Communications**

Questions concerning this RFP: Questions must be submitted in writing via email. Any oral responses to any question shall be unofficial and not binding on the City.

Technical questions can be directed to:

**Name:** Ted Henry, Finance Director

**Email:** [thenry@belaireks.gov](mailto:thenry@belaireks.gov)

## **Addenda**

Questions will be responded to in the form of written addenda to all Proposers. It shall be the responsibility of each Proposer, prior to submitting their proposal, to determine if addenda were issued. Addenda will be issued via email to all proposers who have received a bid packet from the City. All addenda issued shall become a part of the RFP documents and shall be acknowledged and dated by the Proposer on the Proposal Signature Page.

## **Proposal Signature Page**

An unsigned proposal is not a valid offer therefore, failure to sign the Proposal Signature Form Page will result in the proposal being considered non-responsive, and the proposal rejected. Receipt of an unsigned Proposal Signature Page is not a minor technicality that the City reserves the right to waive.

## **Submission of Proposals**

Proposals in response to this RFP shall be considered received at the time actually received by the addressee or designated contact. Proposals received after the appointed time listed on cover page will be determined non-responsive and will not be considered for evaluation and will be returned to the sender unopened.



- All proposals should be addressed as follows:
- NAME
- the City
- ADDRESS
- CITY STATE ZIP
- Mailed and hand-delivered proposals shall include (1) Original, (1) copy, and (1) CD or jump drive copy.
- Mailed and hand-delivered proposals shall include (1) must be sealed, and outside markings must identify: (1) Proposer's Name, (2) Title of this RFP **"ERP RFP 2023"**
- Electronically delivered proposals shall be sent to [thenry@belaireks.gov](mailto:thenry@belaireks.gov) and shall be identified by: (1) Proposer's Name, (2) Title of this RFP **"ERP RFP 2023"**

## Product Demonstrations

Following the first level of evaluation, no more than two selected Vendor/Proposers may be invited to make oral presentations or demonstrations to the City's evaluation team, consisting of product, implementation, configuration, and services. The Vendor/Proposer representatives present during the Product Demonstrations shall be technically qualified to respond to questions related to the proposed Solution and its components.

The Product Demonstrations will focus on the:

History and Overview of the Vendor/Proposer;

Ease of use of the system setup and operations by the City staff;

Standard reporting capabilities of the systems, including any Microsoft or other business intelligence-type reporting tools providing the City with the ability to make informed decisions;

Software's ability to perform integrated, seamless workflow and scheduling processes throughout the Solution;

Vendor/Proposer's implementation process, certifications and track record;

Solution's hardware and infrastructure requirements and capabilities, preferably using Microsoft platform and database solutions;

Service level commitment of Vendor/Proposer

## References and Site Visits

The City will pursue references checks and/or a visit to the selected finalist(s) reference site(s), to discuss and/or observe the applications in an actual working environment. The City may also request a site visit to the selected finalist(s) place of business.

## **Vendor Selection**

Following the product demonstrations, reference checks and site visits, and based on discussions of conversion and implementation processes, the City may select a single Vendor/Proposer based on initial proposals received, without discussion of such proposals. Selection will not be based on price alone.

The City reserves the right to reject any or all proposals and to waive irregularities or excuse technical defects in any proposal when, in its sole discretion, such waiver/excuse is beneficial to the City. The City further reserves the right to reject the proposal of any Vendor/Proposer who has previously failed to perform properly or complete on-time contracts of a similar nature and on a consistent basis, or of any proposed Vendor/Proposer who is not in a position to perform the Scope of Services. Finally, the City reserves the right to award a contract based on initial offers received from Vendor/Proposers, without discussion and without conducting further negotiations. Under such circumstance, the acceptance of a proposal by the City shall be deemed to be an acceptance of an offer that such acceptance will be binding upon both parties. A proposing offer should therefore be based on the most favorable terms available from a price, business requirements and technical standpoint.

Information and/or factors gathered during interviews, negotiations and any reference checks, and any other information or factors deemed relevant by the City, shall be utilized in the final award.

## **Contract Advisement and Negotiations, and Statement of Work Development**

### **Contract Advisement and Negotiation**

Upon completion of the evaluation process, the selection committee will advise all Vendor/Proposers of its final decision. Once the final determination has been made, the City and Vendor/Proposer will enter into negotiations in order to refine and finalize the terms and conditions of the contract. A Statement of Work will be negotiated and agreed upon between both parties.

### **Statement of Work Development**

If the City determines to award a Contract to the finalist Vendor/Proposer, both parties shall enter into the development of a Statement of Work (SOW).

The Software and Services Contract Agreement shall be sent to the successful Vendor/Proposer for signature. Award of Proposal, if awarded, shall be made by the City's office to the Vendor/Proposer offering the most advantageous proposal as it meets the requirements, goals and objectives of the City as set forth herein. Although cost is an important factor in this evaluation, it is not the only factor and therefore the City's office is not obligated to accept the lowest proposal, but will make an award in the best interests of the City after all factors have been evaluated.

No proposal or agreement for Project shall be binding upon the City until after the Agreement is signed by duly authorized representatives of both the Vendor/Proposer and the City.

No the City employee or the City Department has the authority to legally and/or financially commit the City to any contract or agreement for goods or services without the final approval by the City.

## **Modifications After Award**

The City reserves the right to modify the scope of work as it deems necessary during the course of implementation. The Vendor/Proposer shall notify the City of any additional price change, as well as any impact to implementation and/or conversion schedule(s) related to the changed scope of work, prior to proceeding with the scope change.

## **Project Understanding**

This section of the RFP is intended for the Proposer to elaborate and organize its approach to the City project. The Proposer should describe how the overall proposal meets the City requirements, helps the City to achieve its goals, and is the best solution for the City. The Proposer should relate its understanding of the City requirements and goals, the Proposer role in assessing and meeting them, and the challenges that the Proposer unique proposal will help to overcome. These responses should not contain previous answers to questions contained in other sections of this RFP. The intent is to assess project understanding and approach.

- Provide your understanding of the City requested scope of services.
- How do your solution's unique characteristics make it a good fit for this project?
- What differentiates your proposed solution from your competitors?
- Describe how your proposed system enables the City to achieve greater access to data to meet its business intelligence objectives.
- Describe how your proposed system will enable the City to reduce or eliminate duplication of effort, double entry of data, and the use of off-line systems.
- Explain how your solution can support a centralized customer file that the City can utilize throughout the various applications.
- Explain how your solution can support a centralized address/parcel file that the City can utilize throughout the various applications.
- Based on your understanding of the City project, what are the most significant risks to the project, and how do you plan to mitigate them?
- What is your process for managing, monitoring, and resolving issues that occur during the implementation project?
- How do you keep the project on task during the implementation project?
- Do you recommend any products or services not included in the scope of services that you feel would benefit the City and should be considered for inclusion in the eventual contract?
- What is the expected timeline for the project, broken down by applications or subprojects?

## **Cost Proposal**

Proposers must itemize prices for each module and itemize price for data conversion before presenting the total price. Proposers only presenting total cost may be disqualified. The City reserves the right to contact Proposers on price and scope clarification at any time throughout the selection process and negotiation process.

It is important that Proposers use the format presented in this RFP even if another format is provided. Attachment A should include total price for all software, estimated services, and additional costs to acquire all software and services referenced in the proposal including third party prices.

If third party products or services are included, do not provide separate versions of Attachment A (Costs) for each third-party product.

Do NOT use "To Be Determined" or similar annotations in the cells for cost estimates. The City is asking Proposers to estimate prices and hours for all categories with the understanding that they may have to make assumptions. Such assumptions should be stated. Proposers may submit additional pricing sheets

as an addendum to the cost template; however the cost template MUST be completed.

The City may award a purchase contract, based on initial offers received without discussion of such offers. A Proposer's initial offer should, therefore, be based on the most favorable terms available. It may also request revised pricing offers from such proposers, and make an award and/or conduct negotiations thereafter.

## Attachment A

<b>Software</b>	<b>Cost</b>
Onboarding Fees	
Accounting	
Accounting Data Conversion	
Payroll	
Payroll Data Conversion	
Employee Self-Service	
Employee Expense Reimbursement	
Applicant Tracking	
Work Orders, Fleet and Facilities Management	
Fleet Data Conversion	
Reporting Services	
Court	
Court Data Conversion	
Inspections	
Inspections Data Conversion	
Code Enforcement	
Code Enforcement Data Conversion	
Utility Billing	
Utility Billing Data Conversion	
Vendor Licensing	
Vendor Licensing Data Conversion	
Building Permits	
Building Permits Data Conversion	
Backflow Management	
Backflow Data Conversion	
Recreation	
Recreation Data Conversion	
Reporting Software for Public Facing Reports/Letters	
Interface for State Court System	
Interface for Digiticket System	
Interface for Sensus	
Customer Fees for using ACH payment	
Customer Fees for using Debit Card payment	
Customer Fees for using Credit Card payment	
Data Conversion (Total)	
On Site Training	
Online Training	
Total Cost	