

April 16, 2024

City of Superior, WI

Response to Request for Proposal #24-20-FIN
*Enterprise Resource Planning Software Selection Advisory
Services*



April 16, 2024

City of Superior, Attn: Contract Analyst
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Superior, WI 54880

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City of Superior:

This proposal marks the beginning of a valuable relationship we plan to build with the City of Superior, WI (the City). Based on what we have learned from you in your request for proposal (RFP) process, we are confident we are the right fit to serve you with forward-thinking enterprise resource planning (ERP) services. Our proposal meets your RFP requirements and describes our unique proposition to enhance and protect value while performing the following key objectives:

- Identify specific vendors needed to provide a competitive selection process for pricing while meeting the City’s documented requirements for proposed solutions
- Review vendor responses, coordinate vendor demonstrations, analyze the proposals, and help the City’s staff develop recommendations on the various software solutions for City Council consideration
- Provide a successful ERP implementation

Benefits of working with Baker Tilly include:

<p>The right firm</p> <p>The City will benefit from our best-of-both-worlds solution that pairs the technical qualifications, technology tools and expansive resources of the largest firms with the responsive service, personalized attention and proactive communication of smaller firms.</p>	<p>The right experience</p> <p>We are structured around industry-specialized practice groups, allowing us to provide focused training and continuing education to our team. Our understanding of your industry, paired with targeted experience serving public sector clients, will help you thrive now and as you evolve.</p>	<p>The right team</p> <p>Your handpicked team of Value Architects™ includes technical and industry-specialized team members who understand your requirements, challenges and opportunities. You will receive a tailored approach designed to meet your needs and exceed your expectations.</p>	<p>The right value</p> <p>We provide high-quality service for a fair and reasonable fee. Our significant level of partner and manager involvement translates into a responsive, efficient engagement and the ability to deliver value throughout the year.</p>
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The City will be an important client of our firm and we will treat your ERP systems evaluation services as a top priority project. Baker Tilly has successfully assisted other public sector clients across the United States with similar system selections and implementations, working with a wide range of software packages. Building on this experience, we will help you meet the goals of your project and achieve tangible outcomes for future success. Our team is excited to earn your trust, and we look forward to discussing your questions and feedback.

Sincerely,

John T. Runte, Principal
Enterprise Transformation and Digital Solutions
Baker Tilly US, LLP
+1 (414)777 5371 | john.runte@bakertilly.com

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Baker Tilly is responsive, interactive and produces the results they say they will. We are very pleased with the services they provide and consider Baker Tilly a leader among accounting and advisory firms.

Controller



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Executive summary

What makes Baker Tilly different from other firms? Our solution truly begins by listening to what the City needs.

Understanding your needs to help achieve your objectives

The City is looking for a successful ERP implementation and deserves to work with a service provider that goes beyond simply meeting requirements. You require a Value Architect™ who will enhance and protect your value and who will offer ERP selection and implementation services that meet your needs now and as they evolve.

We listened as you described the City’s needs and relationship expectations during our recent conversations. The following table details our understanding of what we heard and how we plan to address your needs in a valuable way.

WHAT WE HEARD THE CITY NEEDS	HOW BAKER TILLY WILL MEET YOUR NEEDS
<p>In-depth understanding of government clients and the State of Illinois</p>	<ul style="list-style-type: none"> • Specialists who work exclusively with public sector entities and have executed numerous consulting projects for other local governments across the nation • Proficiency in business process reviews and internal controls assessments in state, county and municipal government to deliver meaningful advice and recommendations on best practices that enable the effective use of technology • Baker Tilly provides services to more than 100 Illinois government clients
<p>Significant experience in all areas of operations</p>	<ul style="list-style-type: none"> • Deep finance and accounting expertise along with the ability to conduct management consulting projects in the areas of community and economic development, public works, municipal utility operations, human capital and grants and project management • Broad experience needed to engage all stakeholders who will play a vital role in reimplementing your current system or selecting and implementing a new system
<p>Value for fees paid</p>	<ul style="list-style-type: none"> • Competitive fee arrangement; we do not bill for every question, comment or concern • Significant team involvement to deliver timely, responsive service • Training, education and insight at no additional cost • Streamlined approach that pairs technical expertise with innovative technology to add efficiencies

YOU RECEIVE MANY BENEFITS BY CHOOSING TO WORK WITH BAKER TILLY

We understand your needs and will meet your objectives with our ability to offer valuable resources, experience and solutions.

Company profile

State the name, address, and a company profile, including size, qualifications, technical capabilities, etc.

Offering our resources: Baker Tilly consulting at a glance

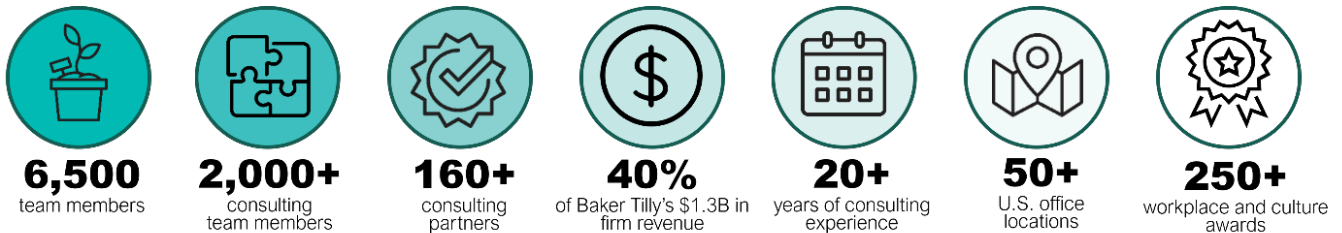
Making decisions today to shape tomorrow is especially challenging in these extraordinary times. The City **requires a firm with consulting specialists who combine functional experience, industry knowledge and technical expertise to respond to your immediate needs and support you as your organization evolves. Baker Tilly is that firm.** We pay special attention to the intersection of strategy and execution to deliver:

- Innovative and pragmatic approaches for assessing changes, adapting quickly, implementing best practices and competing in any environment
- Services to enhance and protect the enterprise value you have worked so hard to achieve
- Strategies to identify and mitigate potential risks
- Solutions for your toughest challenges

When you work with Baker Tilly on your advisory needs, you work alongside an agile team that drives transformation by supporting you with a flexible engagement model that is “right sized” to your unique culture and circumstances. We dedicate ourselves to delivering industry insights, efficiencies, creativity and forward-thinking solutions.

More than anything, the City will receive an exceptional experience for your management team, governance team, internal process owners and — ultimately — your clients.

Below are some key facts about our consulting practice, including the depth of resources that stand ready to support your core project team:



COMPREHENSIVE EXPERIENCE TO SERVE YOU

The City will receive support and guidance from a respected advisory CPA firm that continues to grow.

We meet you where you are on the enterprise journey

Regardless of the solution, we meet you where you are and will tailor our consulting approach to meet your specific needs. This means hand selecting and assembling your service team to offer the right functional experience, industry insight and technical expertise.

Many of our team members have real-world experience implementing ERP solutions in local governments prior to joining Baker Tilly. This empowers them to dive in with an understanding of your day-to-day from day one. We believe in a small team delivery model to work “side-by-side” (in person or virtually) with your internal team.

Public sector specialization

From the start, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships, and the ability to collaborate with our clients. We will work collaboratively with the City as you continue to grow and change.

Government agencies have a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other industries. Recognizing this complexity, and eager to serve as a true valued advisor to the public sector, Baker Tilly formalized its dedicated public sector specialization more than 50 years ago. **Nationwide, our state and local government practice serves more than 4,100 state and local government entities, including municipalities, counties, public utilities, transit, and school districts.** Several of these client groups now have their own sub-specialty practice areas.

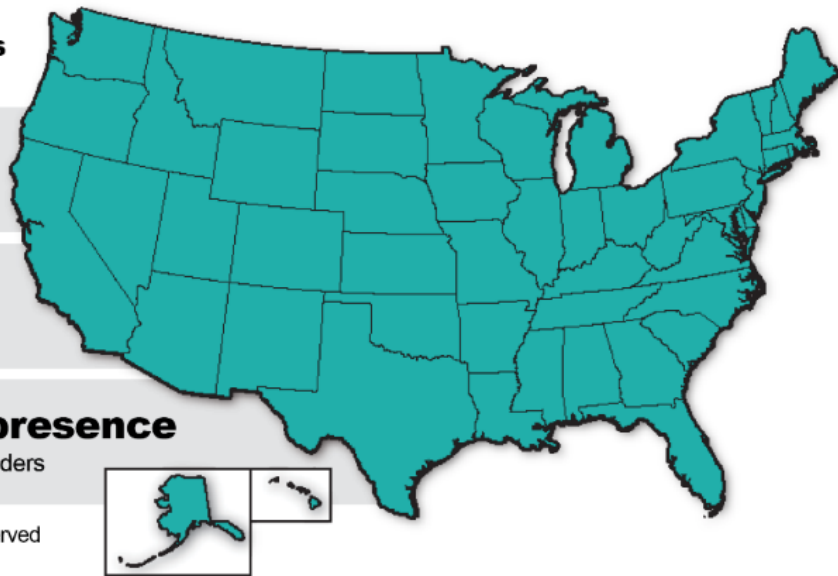
Public sector: experience that matters

4,100+
public sector clients in the U.S.

90+ years
industry experience

Coast-to-coast presence
industry trainers and thought leaders

■ States where Baker Tilly has served public sector clients



Working alongside your internal team toward success

In today's environment, the City cannot afford to stand still. Baker Tilly has the consulting expertise to help you drive transformation, adjust strategies and develop new capabilities.

Through leading analytics and technology platforms, innovative services and pragmatic solutions, our specialists work with clients to capture the digital advantage, compete effectively at the speed of business today and capitalize on the opportunities of tomorrow.

If you have a problem to address or an opportunity to uncover, chances are Baker Tilly has an industry-specialized advisory service to help. Our consulting and advisory specialists support clients in these critical areas:

- Growth
- Data and technology
- Operations
- People
- Risk
- Regulatory

Learn more about the specific services we provide at bakertilly.com/services.

Celebrating more than 90 years serving our valued clients

As a future-looking firm, we celebrate more than 90 years in the marketplace by honoring our roots and continuing to shape our future. We embrace the fact that business can't stand still — and we won't stand still. As we help our clients identify new needs and opportunities, we innovate and change to work better.

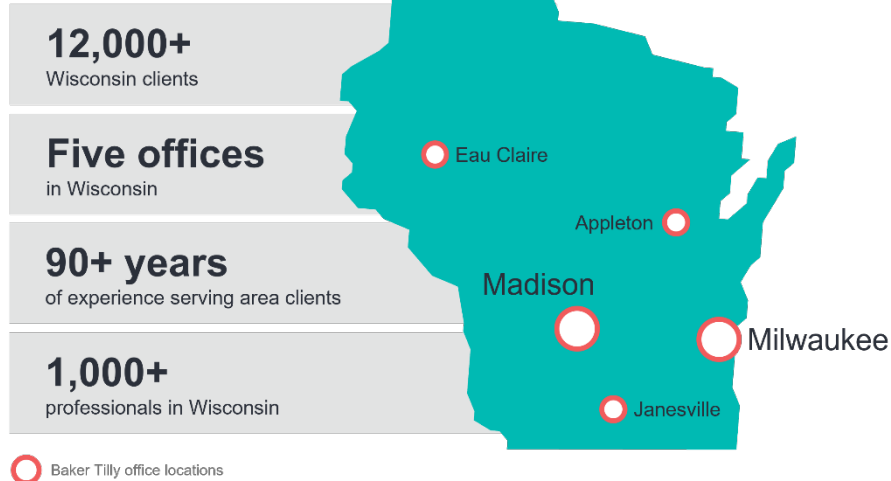


Our roots took hold in 1931 in Waterloo, Wisconsin, where we began as a public accounting firm specializing in canning factory audits. **Since that time, we have grown to become an advisory-focused firm with more than 40 different business combinations.** Our consulting practice formed in 2002.

Offering Wisconsin clients our local and firmwide resources

Baker Tilly understands Wisconsin, its businesses and its industries because we've been a part of your state's fabric for more than 90 years. We were founded in Wisconsin, and it is home to our largest business unit. Our Wisconsin presence includes more than 1,100 professionals in five locations committed to helping clients in a wide range of industries enhance and protect their value. You will receive exceptional service from a qualified local team that can draw on our firm's broad national resources as your goals or needs evolve.

Wisconsin local presence



LOCAL PRESENCE AND EXPERTISE TO SUPPORT THE CITY

The City can count on Baker Tilly's Wisconsin presence to offer you an in-depth understanding of economic conditions, knowledge of regional and state regulations, and on-the-ground assistance whenever needed.

Staff profile

Include a list of the key personnel assigned to this project. Provide a summary of the project team, field staff, and their capabilities and experience. Describe the applicable skills and accomplishments of the project manager including experience negotiating ERP contracts, knowledge of Governmental Accounting Standards and knowledge of Wisconsin laws and practices. Describe project methodology experience and any applicable certifications. Describe how project management, coordination and communications with the City will be accomplished. Indicate what resources are available if additional support is requested. Also note their ability to meet the project workload within the timelines established.

What makes Baker Tilly different from other firms? Our approach includes significant access to executive leaders compared to other firms and we work hard to care more than the other firms given our understanding of the significant investment and risks projects like yours represent.

Your handpicked team of professionals offers a collaborative focus supported by the breadth and depth of our firm’s national resources. We believe in strong personal relationships, which means a personal interest in The City from some of our most experienced team members. Engagement team members are introduced below and **full resumes are in Appendix A.**

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE CITY



John T. Runte — Principal, Enterprise Transformation and Digital Solutions

Value that John brings to the City: Project partner

John has significant experience in software evaluation including evaluation experience across state, county and municipal government entities (for example the State of Indiana, MN - Hennepin County, WI - Dane County and the City of Madison in WI). In addition, John has performed significant IV&V work for public sector entities and project turnaround work for troubled projects in the public sector. John will oversee the entire engagement to make sure the City receives a meaningful, genuine experience. He will work with the team to provide a seamless and well-planned engagement process, valuable solutions and technically accurate final deliverables to achieve your goals. John is committed to the City’s success and satisfaction with our services; he will collaborate with you and the team to meet your deadlines and exceed expectations.



Cam Harrison – Senior Manager, Enterprise Transformation and Digital Solutions

Value that Cam brings to the City: Project manager and subject matter specialist

Cam has over a decade of experience in IT and management consulting, delivering projects in different roles such as solutions architecture, process improvement, program management, ERPs and solutions selection, and implementation, migration, integration, optimization and performance management. Recent relevant projects in these areas include work being done for multiple state systems of higher education where he lead complex projects inclusive of process definitions, new operating model creation, and overall program leadership. Cam will be the primary project manager, overseeing core deliverables such as requirements validation, RFP development, vendor proposal review and due diligence, and facilitation of selection discussions.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE CITY



Brenna Waldschmidt-Gay — Manager

Value that Brenna brings to The City: Manager, Digital

As a manager on the Baker Tilly Digital team, Brenna has six years of business analyst and project management experience. Her work in public sector focuses on aligning future state processes to critical and unique system requirements. In addition, Brenna has managed enterprise solution projects associated with Project Management Office rolls for significant public sector clients. Brenna also participates on the Baker Tilly Digital industry team that focuses on assessment and digital roadmap projects associated with establishing the right sequence for project execution within a digital modernization program.



Chris Strom, MPA — Senior consultant

Value that Chris brings to the City: Senior consultant, Public Sector

Chris is a senior consultant who specializes in various aspects of government. His areas of expertise include parks and recreation, public works, information technology, local government administration, finance, community development, public safety and capital project planning. Chris earned a Master of Public Administration and a Bachelor of Science in law enforcement and justice administration from Western Illinois University.

Prior to joining Baker Tilly’s public sector advisory team, Chris gained experience within parks and recreation, public works, IT, administration, finance, community development, public safety and capital project planning. He has held various positions with the Elmhurst Park District, the Village of Itasca, the DuPage mayors and manager’s conference, and the Village of Kenilworth where he was a member of the ERP implementation team.



Jack Sanders — Senior consultant

Value that Jack brings to The City: Business analyst

Jack will coordinate with the project manager on data collection, analysis, recommendation development and drafting deliverables. He will complete the work plan’s analytical tasks as assigned and required to meet The City’s needs. Jack has significant experience in converting future state process needs into enterprise system requirements to support ERP evaluations. Jack has managed enterprise system projects in roles associated with structured Project Management Office engagements in the public sector. In addition, Jack has managed implementation phase activities for clients after the evaluation phase and has significant experience in vendor management, client management and implementation lifecycle management.

THE CITY WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY

All engagement team members are committed to the City’s success. Their industry experience and service expertise translate into tangible results for the City.

Additional resources available to the City

Your leadership team will be supported by a bench of qualified consulting staff team members. You will have access to highly capable industry consultants that focus on projects you have requested within the RFP.

Relevant experience

Provide examples of related experience performed by the firm during the previous five (5) years (projects with services similar to those outlined in the Section 5, General Scope of Services). Include information on the size of projects, time duration of projects, municipality, ERP software systems implemented, and current contact information for each example. The firm and key personnel must have no less than five (5) years actual business experience in the services to be provided.

Demonstrating project-specific experience

Baker Tilly has been providing digital transformation consulting services and implementations since 2000, which initially started with enterprise on-premises solutions, custom application development and software-as-a-service (SaaS) solutions. Baker Tilly has successfully performed hundreds of software strategy, evaluation and implementation projects with speed, efficiency, and agility for our clients over many years, allowing us to gather broad and deep vendor and product knowledge of many enterprise systems in the market today. Baker Tilly has delivered over 250,000 hours of software evaluation and implementation projects since 2022, averaging approximately 150,000 hours annually.

We have worked with clients across the United States to address system needs assessments, conduct gap evaluations and develop road maps, while leveraging our independent project management experience.

When Baker Tilly works with clients like the city, we bring this experience, insight and research to help fuel the vision, objectives and guiding principles. We work with your subject matter specialists to understand pain points while we leverage our industry expertise to describe the future state of technology and modernization opportunities that may be suitable for you. We take into consideration any internal and external influences that drive industry change, along with the changing organizational environment of products and services, infrastructure and municipality governance models as we identify improvement opportunities.

We use this foundation to accelerate your optimization journey.

Our overall best-of-breed approach enables us to work with the City to optimize the ERP assessment and selection process to minimize the number of systems while satisfying the City’s critical and unique requirements gathered across all in-scope functional areas.

We understand how to optimize after the initial go-live and to work toward harnessing the potential power of systems and solutions that you wanted all along. We also understand how to work within the realities of existing solutions identifying practical and pragmatic solutions and approaches when complete digital modernization is not affordable but incremental improvement can make a dramatic difference.

Our Digital team also brings deep program management, project management and organizational change management services to complex transformation projects. A hallmark of these services is ensuring organizational readiness and overall digital transformation outcomes can be realized.

Overview of relevant projects

The client list below includes a sample client list of the last four years of relevant project experience across similar scope and complexity or project work on behalf of other chambers and economic development organizations.

RELEVANT EXPERIENCE

CLIENT	PROJECT NAME
EMS/ERP assessments and evaluations	
Boone County, Indiana	ERP Needs Assessment
City of Branson, Missouri	ERP Support
City of Goshen, IN	ERP Implementation Services
City of Highland Park, Illinois	EMS needs assessment and system selection
City of Lake Forest, Illinois	EMS needs assessment and system selection
City of Nixa, Missouri	ERP System Selection
Chicago Community Trust	ERP Evaluation Advisory
Computer Data Source LLC	2023 - Program & Data Planning - ERP
Heritage Holdings of Lancaster County	2023 ERP Software Evaluation
Hydrite Chemical Co.	ERP Implementation Support
Hydrite Chemical Co.	ERP Change Management Execution
ICF Consulting Group, Inc.	Enterprise System Transformation
Lake County, Indiana	Assessment and planning
Massapequa Water District	ERP System Selection Consulting
Matsuura Machinery USA, Inc.	ERP Fit/Gap Assessment
Recaro North America, Inc.	FY23 Plex ERP Implementation (China) - Phase 1
Regal Ware, Inc.	ERP Implementation
Sansum Clinic	HCM and ERP Phase 1
SBH Health System (Barnabas)	Oracle ERP, EPM and SCM Cloud
Village of Rolling Meadow, Illinois	EMS needs assessment, selection and implementation

Demonstrating successful relationships with similar clients

We encourage you to connect with the clients below to learn more about the value of their relationship with Baker Tilly. Each client will offer a distinct perspective as you consider your own needs.

ERP NEEDS ASSESSMENT AND SYSTEM SELECTION FOR CITY	
Client	City of Lake Forest, IL
Project narrative	Baker Tilly helped the community identify more than 5,000 functional requirements through on-site requirement validation meetings. The RFP Baker Tilly drafted included these validated requirements, with detailed reporting and interface specifications and request for vendors to respond to community-specific concerns and functional needs. Baker Tilly provided a summary “total cost of ownership” and helped schedule conversations with multiple vendors. We also facilitated system demonstrations accompanied by lab sessions where employees ran through functions to explore the systems’ use and workflow capabilities.

RELEVANT EXPERIENCE

INDEPENDENT ASSESSMENT AND ROADMAP

Client	Milwaukee County, WI (specifically, Information Management and Services Division)
Project narrative	<p>Milwaukee County is one of the largest counties in the United States with more than 950,000 residents and includes a mixture of metropolitan, suburban and rural living.</p> <p>The County is supported by an information management division which is responsible for the management, oversight and development of effective information and technology services. The division is focused on identifying and implementing high-quality, innovative and transformative IT solutions that improve government performance, efficiency and transparency at all levels.</p> <p>With the availability of \$10 million in federal funds from the American Rescue Plan Act (ARPA), the County had an opportunity to reduce the backlog of work and focus on digital transformation initiatives to move from traditional manual processes to more automated, digital solutions. The County was in need of resource bandwidth and digital transformation expertise to effectively communicate with the diverse range of stakeholders throughout the county’s 39 departments and engaged Baker Tilly to help:</p> <ul style="list-style-type: none"> • Identify outdated processes or system deficiencies • Recognize and set objectives for improved services based on IT capabilities • Develop a prioritized digital transformation roadmap of follow-on projects with an independent perspective on how to best utilize the funds <p>For each recommended project, the County was provided with capital and operational expense budget projections as well as an outline of expected benefits post implementation. The information management division and Baker Tilly presented the findings, proposed roadmap initiatives and budget to the board of supervisors, where the roadmap and allocation of funds were ultimately approved and enabled the county to progress down their digital transformation journey.</p>

ERP NEEDS ASSESSMENT, SYSTEM SELECTION AND IMPLEMENTATION

Client	Village of Rolling Meadows, IL
Project narrative	<p>A midsize Midwestern city that housed information in multiple unintegrated and homegrown systems had multiple databases of “source data” and therefore was spending a significant amount of time manually creating and reconciling reports. The community sought a new ERP system that offered standard finance and human resources (HR) functions as well as department-specific modules such as public works, community development and adjudication. Priorities for the City’s ERP system included retention of a “single truth” through fully integrated modules, reduction of cross-module reconciliation needs and extraction of real-time, exportable data that could be manipulated for analysis.</p> <p>Baker Tilly’s specialized public sector team provided project management support and conducted a needs assessment to gather requirements for the City’s new ERP system. We also developed the RFP, which included more than 5,000 functional requirements, interface needs and community-specific nuances — demanding vendors clearly communicate if they could offer the desired integration and functionality to meet the City’s expectations of its future system. In addition, the dedicated advisors at Baker Tilly provided change management guidance by offering the City proven examples for maintaining transparency and communicating effectively with residents throughout the ERP system selection process.</p> <p>Using a Baker Tilly-prepared “total cost of ownership” analysis, the City evaluated the proposed ERP systems’ projected five-year costs related to implementation, staffing and maintenance. Through cost considerations, system demonstrations and discussions with neighboring communities scheduled by Baker Tilly, the community selected a single ERP system with department-specific modules that met current data storage and reporting needs plus room to grow, limiting the need to purchase and integrate additional specialized systems.</p>

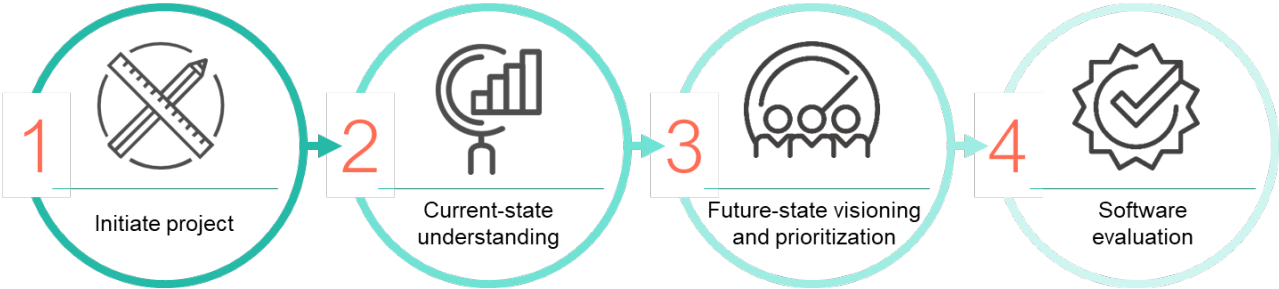
Process / approach

Provide a statement of the services to be provided including a detailed explanation of how the services are to be provided and managed. Indicate how important each service is to successful project completion. Identify the expected involvement by City staff for each major activity in the project. A project schedule with stated milestones should be included in this section.

Baker Tilly system selection methodology

Our methodology builds on the collective experience of our professionals in understanding the business needs of our clients to develop solutions that address complex and challenging issues. **The approach allows us to help you to improve operations while creating lasting value for your organization.**

Baker Tilly suggests the following high-level approach to complete this project. Goals, deliverables, activities and assumptions for each phase are outlined on the following pages.



Phase 1: Initiate project

Goal: Lay the foundation for the project and collaboratively establish a work plan for the engagement. This stage of the project includes:

- Working with the City to finalize approach specifics
- Reviewing and revising our detailed project plan to address anticipated activities
- Understanding the City's resource availability for project activity scheduling

In addition to the activities required for a cost-effective project start up, **we will briefly engage with your executive team to understand the business strategy at a high level and associated requirements that will be important in considering solution alternatives.**

Change management activities will be launched with key stakeholder interviews to understand historical change events, the City's acceptance of change and effective communication methods and channels within your business.

A steering committee that includes your executive leaders will work to define goals and objectives for the ERP selection project. Together, we will align key stakeholders and project participants with these goals through the development of a project charter. Project participants will refer to the charter continuously, so the project team remains focused on desired results.

In this initiate stage, we will establish a consistent communication process – from project kick-off through project completion – and will collaboratively develop a communication plan and draft communication

artifacts that you will finalize and deliver. Managing expectations and engaging the broader organization early will increase acceptance and adoption of proposed changes.

We will look to your leadership team to select key functional leads from across the business as the core team for the project. The core team provides the primary input to the requirements definition, developing business scenarios to drive vendor demonstrations, assessing software demonstrations and scoring, and making a vendor recommendation to the steering committee.

Core team members need to have good interpersonal skills, an inquisitive attitude, comfortability working in a group, respect in the organization and a willingness and ability to be a change agent to help the ERP project succeed. Including functional leaders from key parts of the organization will help promote the change management process and create buy-in.

Once we have established the project calendar, defined goals and objectives, and finalized the City's team members, we will conduct a formal project kick-off meeting to align expectations with the City and Baker Tilly leadership and team members.

Before starting requirement gathering workshops, a ERP education session will take place. This session will help the City's project team understand modern-day application capabilities and help each team member begin to envision what might be possible with a new ERP.

ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Confirm project approach, goals and objectives and understand long-term business strategy • Finalize work plan, resources and schedule • Prepare project kickoff communication to align stakeholders and project participants on expectations and outcomes of the project • Establish project management tools, templates and infrastructure • Determine frequency of status meetings and status reports • Conduct project kickoff meeting • Schedule working sessions / workshops 	<ul style="list-style-type: none"> • Project schedule, including client resource requirements • Project kickoff meeting • Working session / workshop schedule

ASSUMPTIONS
<ul style="list-style-type: none"> • The City will provide Baker Tilly with any available data, research and background • The City and Baker Tilly will collaboratively work to align and balance alternative resource commitments • The City will schedule and provide resources to participate in all workshops and meetings • The City will provide activity and progress updates, as needed • One 1-hour executive business strategy review

Phase 2: Current-state understanding

Goal: Understand current-state opportunities, issues and challenges to help prioritize and sequence future-state capabilities.

Conducting cross-functional requirements workshops will encourage project team buy-in and excitement for the future state of the City. This buy-in will be critical to successful organization-wide communications about the plan. The workshops should open the eyes of project team members to the possibilities of a better ERP.

Project team members should consider questions such as:

- What are your current pain points?
- If you could do things differently, what would they be?
- What are you doing manually?

These pain points and issues can translate into requirements to guide a potential vendor into presenting a viable solution to the City.

The project team should think outside the box about what is possible with new technology when considering any current business problems that need to be solved. They should focus on the critical **what**, not the **how**. The team needs to define the qualities that make the City different, identify what is possible and recognize where improvements can be made. Then they can prioritize critical and unique requirements to narrow the field of ERP choices.

Organizations have both critical and unique requirements. Critical requirements are the **must haves** that would alleviate major present-day pain points, allow significant improvement to a process, or allow compliance with company policies, guidelines, or structural realities. Unique requirements are those things that may need to be customized by a systems vendor, supplemented with another type of software, or may not be common to all ERP solutions.

ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Gather available current state documentation • Review existing systems/applications landscape • Conduct working sessions with key business and IT stakeholders: <ul style="list-style-type: none"> • Understand current state practices, operating model and desired future state performance • Capture current state organization strengths, weaknesses, opportunities and challenges • Build a heat map and summary of potential gaps • Review findings with core team • Sponsor review and approval to proceed 	<ul style="list-style-type: none"> • Workshop agendas and pre-work • Updated Systems/Application Landscape Diagram • Interview guides • Critical and unique functional and technical requirements list • Current state summary • Executive checkpoint

ASSUMPTIONS

- The City will provide Baker Tilly with available current state documentation regarding systems, reports, processes, procedures, users, performance metrics and known issues
- Workshop participants will include key individuals across all levels within each functional process listed in the scope section and key “internal customers”
- Workshops will include employees only, no external stakeholders
- The City resources will be fully knowledgeable about their process area and willing to engage and share issues, gaps and pain points
- Up to six 30-minute to 1-hour workshops or interviews will be conducted
- Up to two half-day workshops to review findings with the core team
- One 2-hour workshop with executive leadership to review findings

Phase 3: Future-state visioning and prioritization

Goal: Collaborate to define and prioritize high-level future-state capabilities (people, processes and technology).

Review processes and identify areas for improvement

As technology improves and innovations facilitate improvements, we will use our knowledge of multiple solutions and best practices in similar organizations to work closely with your stakeholders to review processes and identify less-than-optimal areas.

Our team will develop a detailed inventory of improvements identified from the sessions, categorized by people, process and technology groupings. Key improvement themes will be highlighted during an executive checkpoint session. We often find this process identifies activities that can be addressed by independent initiatives or prerequisites to the software implementation.

Evaluation strategy and initial vendor assessment

Based on the City’s unique and critical requirements, we will identify and recommend a list of appropriate software vendors. We will work with you to contact the vendors whose systems are determined to address your requirements and preferences most effectively. Our team has experience with many of the vendors likely to be finalists in your evaluation.

We use a combination of independent internal research, engagement and consideration of ERP industry analysts, as well as direct experience with many vendors in prior project work to inform this initial list of vendors for consideration. We would move to a “fit-gap” approach if the critical and unique requirements can only be met by a single vendor.

ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Facilitate workshops with business leads and IT to define high-level desired future state capabilities • Confirm future state prioritization criteria and prioritize capabilities for future state with the City’s core team • Identify critical change impacts for the City’s stakeholders • Assess vendor choices and develop approach options to conduct the vendor evaluation • Sponsor review and approval to proceed 	<ul style="list-style-type: none"> • Identification of high-level people, process and technology impacts • Prioritized list of future state capabilities and refinements to critical and unique requirements • Vendor evaluation strategy summary • Executive checkpoint

ASSUMPTIONS

- Up to six 2-hour future state workshops with key business and IT stakeholder groups
- Two 2-hour workshops for review and prioritization of future state capabilities with core team and key stakeholders
- One 2-hour workshop with executive leadership to review findings
- A subset of key stakeholders will be selected from the current state participants to identify desired future state needs
- Assumes collaboration from key stakeholders on all future state visioning activities

Phase 4: Software evaluation

Goal: To evaluate software solutions against critical and unique requirements.

Baker Tilly has performed hundreds of software strategy, evaluation, and implementation projects for our clients over many years, which has allowed us to gather broad and deep vendor and product knowledge of many enterprise systems in the market today.

Within the past 8-10 years, as interest in cloud computing and SaaS increased, Baker Tilly developed relationships with several leading cloud and SaaS vendors. Many of our clients are interested in and continue to move their enterprise systems to the cloud. These relationships allow us to have the best information and resources available to pass along to our clients interested in cloud-based solutions.

We continue to maintain our relationships with on-premise vendors, thereby bringing a well-balanced background of the current players in the ERP market. We are not a reseller of any solutions, and these relationships have not impaired our ability to maintain independence on behalf of our clients.

Baker Tilly understands that the City wishes to evaluate solutions that meet the requirements in a single, integrated solution. Once we know the City's critical and unique business requirements, Baker Tilly will guide the best fit vendors to meet your needs.

Cloud vs. On-Premise Enterprise Solutions

Baker Tilly believes each client situation is unique; however, the evolving cloud software vendor solutions continue to redefine the enterprise systems and technology landscape. Cloud software platforms are a crucial foundational component for most modern enterprises. Not only can a cloud platform provide significant cost advantages over traditional on-premise solutions, but it gives a foundation for enabling technologies, more straightforward incorporation of external data, and executing business processes in ways never before possible. A combination of business requirements, technical requirements, and the future state vision and strategy of the City will allow Baker Tilly to guide cloud versus an on-premise approach to the software decision.

Request for Proposal (RFP)

Requirements gathered during the project work will be used to develop a comprehensive RFP issued to prospective software vendors approved during the executive checkpoint. Baker Tilly will take ownership of being the primary point of contact for vendors throughout this step of the process. We will also conduct discovery sessions with the City's team to help the software vendors understand the business requirements and prepare their RFP response in advance of the RFP responses.

We will facilitate the project team through a detailed analysis of the ERP vendor responses, including using a scoring approach to evaluate the vendor's ability to deliver each requirement out of the box via customization or via a 3rd party add-on product. A facilitated workshop with your team will be conducted

to review input and form a recommendation. The City's stakeholders will collectively make the decision on the finalist vendors.

The outcome of the RFP evaluation process should narrow down the vendor candidates to no more than two vendors. Having more than two vendors can expand the time to make a final decision and makes it difficult for the project team to see differences.

Scripted Software Demonstrations

Baker Tilly will support the City by drafting a demonstration script, developing scorecards based on the evaluation criteria, participating in detailed software demonstrations, and supporting your team to complete a scoring analysis for each vendor response. These scorecards will incorporate both objective and subjective evaluation measures.

We will conduct discovery sessions with the City's team and software vendors to prepare for the demonstrations in advance of the detailed software demonstrations. Our vendor evaluation process focuses on surfacing vital information to empower the City to make an informed decision when selecting the vendor that best fits their vision for the future.

The creation of demonstration scripts for selected critical processes is important so the City can see the processes and requirements that matter most to your business. Using demo scripts allows the City to evaluate the competing vendors on the criteria that will matter most to you. The vendors will be given firm deadlines to present their demonstrations, so the project stays on track and considers the City's functional, technical and implementation requirements.

With our approach toward structured demonstration scripts, you can invite a broader group of people from the company – functional subject matter experts, like shipping or receiving – to the product demonstration as a way of assessing capabilities and increasing organizational buy-in. These additional participants would not be expected to score the demonstration but could provide input to those on the team who are scoring.

Prior to the execution of the software demonstrations, Baker Tilly will conduct a coaching session with the City's team to review guidelines and expectations for scoring and documenting detailed notes.

At the conclusion of the software demonstrations, the core project team will make a recommendation, not a decision. The project team recommends the vendor with the best fit based on functional alignment to critical and unique requirements.

The City will collaborate with Baker Tilly's team members throughout the engagement, and this is especially true during the vendor evaluation stage of the project.

The Baker Tilly team will work with your leaders and stakeholders to assess all aspects of the vendors and associated solutions (advantages and disadvantages) among the potential software vendors. We will lend our expertise during this process, but the City's stakeholders will ultimately and collectively make the ultimate decisions regarding the final software vendor and associated solutions.

ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Develop RFP and distribute • Facilitate vendor discovery sessions for RFP response • Score and assess RFP responses • Develop a demonstration script and agenda • Finalize decision criteria and scoring model • Facilitate remote discovery sessions with finalist vendors • Conduct structured software demonstrations and follow-ups post demonstration • Analyze vendor scoring results and confirm team recommendation • Develop a final report • Conduct executive checkpoint review 	<ul style="list-style-type: none"> • RFP document • RFP scoring summary template • Demonstration agenda and scripts • Vendor evaluation criteria and scorecard • Vendor evaluation strategy summary • Executive checkpoint deck
ASSUMPTIONS	
<ul style="list-style-type: none"> • Up to 4 qualified vendors for high-level vendor screening (RFP) are in scope • 1-hour remote discovery session for each selected vendor for RFP participation • Two finalist vendors will each participate in separate one-day scripted functional demonstrations (4 hours), 1-hour technical discussion, and 1-hour implementation discussion • The software demonstration scripts will consist of up to four cross-functional business scenarios • The City will be responsible for collecting demonstration data • 1-hour executive checkpoint 	

Ongoing: Project management

Goal: Manage the project to define plans and communicate status of project activities.

Baker Tilly will apply a disciplined approach to managing the project to ensure that we respond to the City's needs, meet agreed-upon deliverables, and regularly communicate project status. We will actively manage the scope, tasks, resources, issues, and risks and communicate any delays in project activities and deliverables that may arise.

We expect project management to be a shared responsibility of the City and Baker Tilly. However, our Baker Tilly team will drive the engagement and do more/less based on your direction and preferences. We will maintain open lines of communication. Our project management expertise enables us to respond to your needs while addressing any potential impacts on the project.

ACTIVITIES	DELIVERABLES
<ul style="list-style-type: none"> • Update task status and work plan • Monitor and resolve issues and risks • Develop bi-weekly status reports 	<ul style="list-style-type: none"> • Revised/updated work plan • Issue / Risk list • Status reports
ASSUMPTIONS	
<ul style="list-style-type: none"> • Bi-weekly status reports will occur over ~10 project weeks 	

Other key assumptions

In addition to the assumptions outlined in the **'technical approach'** section, Baker Tilly has defined the following general project assumptions. All fees and expenses set forth in this proposal are contingent upon the accuracy of these assumptions and are subject to change if any such assumptions turn out to be incorrect.

- The City will provide any existing documentation that will support the project activities. Assumes data, research and background information are readily available and will be provided to the project team. The City is responsible for the accuracy and completeness of this information, and Baker Tilly is not responsible for errors or claims arising from the delivery of their work if based on inaccurate or incomplete information provided by the City.
- The City will provide knowledgeable resources to participate in defined project activities. Baker Tilly will rely upon SME representation and the City ownership of recommendations and will not test for the accuracy of SME team member representations. Essentially, Baker Tilly is facilitating a process on the City's behalf, but client shall retain ownership of recommendations and results of the initiative.
- Baker Tilly resources will be dependent on the start date of the project.
- The City and Baker Tilly will collaborate on all deliverables. Baker Tilly will lead the development of deliverables and the City to complete detailed reviews.
- The City will provide support for scheduling interviews and workshops. We will collaboratively work to align and balance alternative resource commitments.
- The City leadership will review and sign off on each project step's deliverables within five business days of the step close-out meeting.
- We will set up regular project checkpoints with project sponsors to evaluate progress to plan, discuss project issues and adjust project approach. The City and Baker Tilly will work collaboratively together to manage to milestones, resources, issues and risks.
- Baker Tilly will not be held responsible for delays in the project timeline due to unavailability of data or resources from the City or software vendors.
- The City and Baker Tilly will respond to requests for information, input and approvals in a timely fashion as outlined in the work plan of the project.
- Project durations are estimates, mostly dependent upon the City resource availability.
- The City resources will be available from the start of the project and as needed to provide subject matter knowledge and input.
- Project effort, timing, and associated professional fees are based on the scope, approach, and assumptions in this SOW and incorporated into our work planning and estimating. Any factors that could impact timing or fees will be discussed with the City in advance of incurring additional fees.
- Out-of-pocket expenses, if applicable, are billed in addition to professional fees at actual amount incurred.

Co-developing a timeline to meet or beat the City’s deadlines

At Baker Tilly, we adjust our approach to your timelines and prioritize your deadlines. Your time is valuable, and one significant way we will support your organization is by delivering your services on time or ahead of schedule.

Below is an overview of our customized approach to successfully provide ERP solution evaluation services to the City. Phase 1 will take approximately 12 to 16 weeks to document processes and requirements for the RFP. Phase 2 is estimated to be completed in 20-26 weeks based on vacation timing and availability of City resources to attend vendor demos. The actual implementation of the new system in Phase 3 may take anywhere between 6 and 12 months pending the application and scope of processes included in the new system. During the initiation of each phase, we will collaborate with you to co-develop an agreed-upon service timeline that meets your needs and timing requirements. Please see **appendix B** for detailed timing and estimated level of effort per task within each phase.

ACTIVITY	MONTHS													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Phase 1: Discovery & Requirements Gathering	█	█	█	█										
Phase 2: Evaluation & Selection				█	█	█	█	█	█	█	█			
Phase 3: Implementation										█	█	█	█	>>>

COMMITMENT TO SUCCESSFULLY DELIVER CONSULTING SERVICES TO MEET YOUR REQUIREMENTS

The City’s time is valuable. We will co-develop a timeline to provide the City with services on time or ahead of schedule.

Cost proposal

Provide a detailed firm, fixed total price for each phase of the services. This price shall include any and all costs to perform the services to the City's satisfaction, including but not limited to all costs for materials, labor, travel, supplies, permits, licenses, other typical reimbursable expenses, and indirect costs.

Our fees for the first two phases of this engagement are estimated to approximately **\$265,000** based on the approach and associated work plan outlined in this proposal, the Baker Tilly resources required to assist the City, and the assumptions outlined in our defined scope. We will seek approval for any changes to scope or assumptions that would deviate from the range before incurring fees. These fees are based on the assumption that Baker Tilly will be responsible for the documentation of all processes, data flows, technical architecture diagrams, and integrations. We strongly believe that the effort required to properly create detailed documentation will be necessary to ensure the correct platform is selected and scope changes during implementation are kept to a minimum, thus reducing the total cost of the implementation.

Our fees assume a single RFP to select an EMS, and a single RFP (if required) to select the associated technical implementation partner. In the event we cannot administer a single RFP, we anticipate the range of fees for additional RFPs and associated evaluation/selection processes to be between **\$40,000 and \$45,000** per RFP. This would include the RFP creation, vendor solicitation, initial RFP scoring, vendor demonstrations, final recommendations, and contract negotiations in line with the proposed activities above.

Our fees for the third phase of the project, the implementation of the ERP system, are estimated to be approximately **\$430,000** based on past experiences implementing these systems. These numbers at this stage should be received as a best estimate due to key cost drivers such as total scope of the implementation, the software being implemented, ancillary applications needed, and services provided by the technical implementation partner is not known. Upon the completion of phase 2 of this proposal the fees associated with this the final phase will be re-assessed.

Provide a detailed breakdown of the total price for the services, per phase, for the entire term. Please provide a specific, line-item accounting for the cost of each and every task and/or deliverable outlined in the Scope of Services. The City reserves the right to select the phases to award.

SUMMARY OF FEES	
Phase 1 – Discovery & Requirements Gathering	\$135,000
Board and Council coordination <i>(if desired)</i>	<i>No cost / Baker Tilly investment *</i>
Additional RFP(s) <i>(if needed, per RFP)</i>	\$40,000 – \$45,000
Phase 2 – Evaluation & Selection	\$130,000
Phase 3 – Software Implementation	\$430,000

** Estimated to be approximately a \$12,000 – \$15,000 value.*

COST PROPOSAL

Provide a schedule of billing rates by category of employee and job title to be used during the term of the agreement. This fee schedule will be firm for at least one (1) year from the date of the agreement. The fee schedule will be used as a basis for determining fees should additional services be necessary. A fee schedule for sub-consultants, if used, shall be included.

Rates by staff level

STAFF LEVEL	HOURLY RATE
Partner / Managing Director	\$450
Director	\$375
Manager	\$280
Consultant / Analyst	\$225

Required items

Provide a list of all subcontractors, proposed duties and functions, qualifications, contact information, etc.

Baker Tilly does not plan to utilize any subcontractors in the completion of activities outlined by the City's RFP.

Complete the Statement of Qualifications Reference Form. Provide at least three (3) references of current or recent clients familiar with your project team. Respondents shall provide an indemnification and hold harmless statement protecting the reference for comments and opinions provided.

Please see **Appendix C** for our completed Statement of Qualifications Reference Form.

Complete the Qualification Evaluation Checklist.

Please see **Appendix C** for our completed Qualification Evaluation Checklist.

The respondent shall include a statement that he/she made their own examination, investigation and research regarding the method of doing the work, all conditions affecting the work to be done, the labor, equipment and materials, and the quantity of the work to be performed. The Proposer agrees that it has satisfied itself by Proposer's own investigation and research regarding all of such conditions, and that Proposer's conclusion to enter into the Service Agreement and based upon such investigation and research, and that Proposer shall make no claim against the City because of any of the estimates, statements or interpretations made by any officer or agent of the City which may prove to be erroneous in any respect.

Baker Tilly has made our own examination, investigation and research regarding the method of doing the work, all conditions affecting the work to be done, the labor, equipment and materials, and the quantity of the work to be performed. Baker Tilly agrees that we have satisfied ourself by our own investigation and research regarding all of such conditions, and that our conclusion to enter into the Service Agreement and based upon such investigation and research, and that Baker Tilly shall make no claim against the City because of any of the estimates, statements or interpretations made by any officer or agent of the City which may prove to be erroneous in any respect.



Appendix A: Resumes

PRINCIPAL

John T. Runte

John Runte, a principal and practice leader of Baker Tilly's enterprise transformation and digital solutions, joined the firm in 2002.



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Education

Bachelor of Business
Administration in
finance and management
information systems
University of Wisconsin – Oshkosh

John has an extensive consulting background and currently leads Baker Tilly's enterprise strategy and transformation solutions practice. Prior to joining Baker Tilly, he consulted in a global accounting, tax and consulting firm.

Specific experience

John's experience includes extensive work encompassing complex project management, process redesign, new product development, information system strategic planning, information system design and implementation with a focus on program management of large complex transformation projects, application integration solutions and digital solutions focused on advanced analytics and intelligent automation. Samples of John's project experience are included below:

- WI Department of Health and Family Services – John and team led an assessment of strategy, people, process and technology associated with the Medicaid Infrastructure Grant identifying critical process and software requirements necessary for the state to deliver on objectives focused on the Medicaid Infrastructure Grant.
- Goodwill Industries – John and team led a software evaluation for goodwill industries associated with finding enterprise solutions that addressed critical and unique requirements for financial management enterprise software solutions. We remained engaged post software selection and staffed the Financial Management PMO and change management roles for this complex enterprise software solution implementation.
- City of Madison WI – John and team led the financial management software evaluation project including the definition of requirements, vendor demonstration, initial implementation planning and contract negotiation for this highly complex financial management solution.
- State of Indiana: John led the process and requirements definition for the State's voter registration system, including the vendor selection for Indiana's Help America Vote Act project. Once the vendor was selected, John led a team focused on assessing system development and testing methodologies of the selected vendor including project management and vendor monitoring serving in the independent validation and verification (IV&V) role. John and his team have remained engaged for the past sixteen years managing the program of initiatives within this \$60 million dollar federally mandated program within the State of Indiana.
- Pennsylvania State System of Higher Education: Overall PMO lead for significant operational transformation as the team worked to integrate six universities into two regional universities.

PRINCIPAL

John T. Runte

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Specific experience, continued

- Chart RRG – John and team helped this member owned healthcare risk retention practice identify requirements for new website solutions. Upon completion of the requirements document, John and team facilitated the vendor evaluation process leading to new software solutions.
- Dane County WI – The county needed assistance with making decisions on enterprise software solutions. John and team facilitated the team through identification of key requirements, vendor demonstrations, initial implementation planning, contract negotiation and ultimate software vendor award.
- Assurant Health: Executive oversight and delivery responsibility for application integration solutions associated with customer portals. Designed, developed, tested and implemented customer and product profitability management reporting solutions via significant optimization of existing data warehouse assets.
- Healthcare Claims TPA – Our client required a strong financial management PMO to address the implementation of third-party-administrator (TPA) software solutions focused on claims management, claims processing and claims reporting. John and team addressed PMO operations for the design, development and implementation phases of the project. The team also focused on organizational readiness and training for the future state implementation.
- General assessments: John has conducted more than 30 general assessments in Fortune 500 organizations and large government organizations with a focus on complex project initiatives involving technology design.
- Numerous other projects involving business and technical transformation, assessments, strategic planning, new product development, process improvement, methodology improvement, business intelligence, data warehousing, large-scale system development, large-scale program management, and project management initiatives
- Executive oversight and delivery responsibility for more than twelve software evaluation projects.

Industry involvement

- Society of Information Management (SIM)
- Project Management Institute (PMI)

SENIOR MANAGER

Cam Harrison, MBA

Cam is a senior manager with Baker Tilly Digital.



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Education

Master of Business Administration
University of Wisconsin-Milwaukee

Bachelor of Arts in business
administration
Carthage College
(Kenosha, Wisconsin)

Cam has spent his career in a wide range of roles supporting clients within the broader IT space. He blends digital transformation strategy with operational efficiency and financial feasibility to ensure the overall success of programs and projects. Prior to joining Baker Tilly, he worked at a digital consulting services firm focusing on enterprise software implementations and digital strategy supporting mergers and acquisitions.

Specific experience

- Manages large scale digital transformational efforts across various industries in both private and public sectors
- Has managed digital transformation strategy scoping exercises focusing on improving operational models while supporting overall organizational strategic goals
- Has led and designed integration management offices to support acquisitions for both private transactions and private equity-backed organizations ranging from \$20 million to \$3 billion for both private and publicly traded companies
- Has managed enterprise software implementation programs with various vendors and systems implementors in the ERP, CRM, WMS and PLM spaces
- Has managed and created new operating models from assessment data for multi-year programs inclusive of hardware, software and resource needs to provide financial impact assessment and feasibility planning with proforma financial statements
- Has led long term program management needs for clients in wholesale distribution, retail, professional services, software and financial services industries

Industry involvement

- Mentorship network for Carthage College school of business and University of Wisconsin Milwaukee's executive MBA program

Industry involvement

- Operates a group mental health and therapy practice in Chicago
- Coffee, Hip-hop and Mental Health
- My Block, My Hood, My City

MANAGER

Brenna Waldschmidt-Gay

Brenna is a manager with Baker Tilly Digital's solutions consulting practice focusing on project and program management/transformation.



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Education

Bachelor of Business
Administration in finance
and marketing
Loyola University of Chicago

Brenna's more than five years of experience has primarily focused on project management and digital strategy. She has supported projects in a variety of industries including financial services, energy, higher education, government contractors, and public sector.

Specific experience

- Conducted a county-wide, digital transformation assessment that impacted over 45 county departments. Developed business cases and roadmaps for over 20 initiatives that were presented to the county board.
- Led an ERP software evaluation for finance, HR and operations functional areas. Held business process and technical requirement workshops, supported RFP development, vendor demos and selection.
- Led the planning and execution of user acceptance testing and system implementation for a recently acquired government contractor to comply with federal regulations and standards.
- Supported the operations and digital transformation for the merge of six higher-education organizations into two new entities. Aligned the organization's processes and strategies to ensure an effective merge.
- Lead project management analyst for the design, development, testing and deployment of customer-facing mobile applications for a multistate Fortune 500 utility group.
 - Responsible for monthly budget reporting and reconciliation supporting supply chain negotiations of external vendor contracts, daily management of risks and issues, tracking business benefits and building an application lifecycle management approach.
- Transformed a group of financial institution client's strategic goals into actionable project roadmaps.
 - Managed vendor identification, formal RFI/RFP communications, technology demonstrations and pilot discussions for five simultaneous projects focused on virtual and augmented reality, blockchain and biometric identification technologies.
- Assisted with the development of customer experience (CX) strategies for financial institutions.
 - Collected and analyzed the client's data, conducted credit union member and staff interviews and integrated the data and interview findings into an innovation workshop facilitated with client leadership.
 - Created and presented a strategic roadmap to the client team to roll out the innovations and new customer experience journey.

Christopher Strom, MPA

Christopher is a senior consultant of public sector advisory team, joined Baker Tilly in 2019.



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Education

Master of Public Administration
Western Illinois University
Macomb, Illinois

Bachelor of Science in law
enforcement and justice
administration
Western Illinois University
Macomb, Illinois

As a senior consultant on the public sector advisory team, Christopher is staffed on various types of projects such as, strategic planning, comprehensive planning, organizational/operational reviews, business process reviews, system implementation, and many others.

Christopher specializes in multiple aspects of government, joining Baker Tilly with four years of industry experience. During his time before joining the public sector team, Christopher has experience within parks and recreation, public works, information technology, administration, finance, community development, public safety, and capital project planning. Following his education, he has held various positions with the Elmhurst Park District, the Village of Itasca, the DuPage mayors and manager's conference, and the Village of Kenilworth.

Aside from his career experience and education, Christopher takes pride in creating trusting professional relationship with the goal of delivering effective results.

Specific experience

- Budgeting
- Business process review
- Comprehensive planning
- Customer service
- Financial system implementation
- Grant writing and post award management
- Operational and organizational policy audit
- Operational and organizational reviews
- Policy creation and implementation
- Project management
- Strategic planning

SENIOR CONSULTANT

Christopher Strom, MPA

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Industry involvement

- Illinois City/County Management Association
- Illinois Association of Municipal Management Assistants

Community involvement

- PADS Shelter Program (homeless shelter volunteer)
- Habitat for Humanity Certified Fraud Examiner (CFE)

SENIOR CONSULTANT

Jack Sanders

Jack Sanders is a staff consultant in Baker Tilly's enterprise transformation and digital solutions consulting practice who has been with the firm since 2021.



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Education

Bachelor of Science in Business
*Economic Consulting and
Business Analytics*
Indiana University – Bloomington

Jack is focused on developing innovative and strategic solutions to drive business growth for clients. He has experience with companies in the higher education, public sector, and field services industries. His primary areas of expertise are:

- Digital transformation
- Project and change management
- Strategy articulation and development
- Data analysis
- Vendor management

Specific experience

- Led project and change management activities related to requirements gathering, process definition and end-user training for the implementation of new enterprise solutions associated with a utilities services organization.
- Evaluated current state operating procedures to develop critical and unique systems requirements to optimize system functionalities and user experience for a utilities services organization's enterprise solution.
- Coordinated vendor management activities while overseeing the development, testing, and go-live of a utilities services organization's work enterprise solution.
- Developed the operating structure and governance model of a cross-campus, shared services platform for a statewide colleges and universities public higher education system.
- Conducted change management and organizational business readiness seminars with leadership from a statewide colleges and universities public higher education system to educate their internal operating committees on best practices for ensuring the long-term success of a new project management office.
- Performed project management activities and current state process analysis for workflows across three newly integrated college campuses for a statewide colleges and universities system.
- Served in a project and vendor management role for a State Election Division to facilitate the scoping, approval, and execution of enhancements, modernization projects, and accessibility projects involving statewide voter registration systems and voter portals.
- Facilitated the scoping, approval, and release of hundreds of hours in enhancements to a Statewide Voter Registration System.

Appendix B: Phase breakdown

ID	PROJECT TASKS & ACTIVITIES	START DATE	END DATE	BT HOURS				BT FEES	TRAVEL	TRAVEL FEES	TOTAL FEES	SUPERIOR HOURS	RELATED DELIVERABLE
				Resource 1	Resource 2	Resource 3	Resource 4						
P1.000	Phase 1 - Discovery & Requirements Gathering	6/3/2024	9/6/2024	26.5	97.25	106.75	153.75	\$ 112,877.50		\$ 8,500.00	\$ 121,377.50	138.5	
P1.001	Project Mobilization	6/3/2024	6/20/2024	2.75	5.25	7.75	8.25	\$ 7,232.50		\$ 4,000.00	\$ 11,232.50	0	6.1
P1.002	Initial leadership meeting	6/3/2024	6/3/2024	1	1	1	1	\$ 1,330.00	Yes	\$ 4,000.00	\$ 5,330.00		6.1
P1.003	Draft project charter as needed Gather	6/3/2024	6/7/2024		0.5	1	1.5	\$ 805.00			\$ 805.00		6.1
P1.004	workshop attendees	6/3/2024	6/7/2024		0	0.25	0	\$ 70.00			\$ 70.00		6.1
P1.005	Hold project kick-off call	6/11/2024	6/11/2024	1	1	1	1	\$ 1,330.00			\$ 330.00		6.1
P1.006	Schedule workshops	6/11/2024	6/18/2024		0.5	0.25	0.75	\$ 426.25			\$ 426.25		6.1
P1.007	Schedule leadership team check-in calls	6/11/2024	6/11/2024		0.25			\$ 93.75			\$ 93.75		6.1
P1.008	Finalize project plan and timing Finalize	6/11/2024	6/18/2024	0.25	1	2.25	1.5	\$ 1,455.00			\$ 455.00		6.1
P1.009	communication plan	6/11/2024	6/20/2024	0.25	0.75	2	2.5	\$ 1,516.25			\$ 516.25		6.1
P1.010	Align on status reporting format	6/11/2024	6/13/2024	0.25	0.25			\$ 206.25			\$ 206.25		6.1
P1.011	Current State Workshops & Documentation	6/10/2024	8/29/2024	7	48	56	105	\$ 60,455.00		\$ 4,500.00	\$ 64,955.00	117	6.2
P1.012	Requirements Workshops	6/10/2024	7/24/2024	0.5	21.5	23	51	\$ 26,202.50		\$ -	\$ 26,202.50	44	6.2
P1.013	Workshop Prep	6/10/2024	6/21/2024	0.5	2	2.5	3	\$ 2,350.00			\$ 2,350.00		6.2
P1.014	Review existing documentation General	6/11/2024	7/5/2024		3	4	4	\$ 3,145.00			\$ 3,145.00		6.2
P1.015	ledger	6/17/2024	6/17/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.016	Budgets	6/18/2024	6/18/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.017	Accounts receivable	6/19/2024	6/19/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.018	Purchasing & inventory	6/20/2024	6/20/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.019	Fixed assets	6/24/2024	6/24/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.020	Payroll	6/25/2024	6/25/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.021	Employee web portal	6/26/2024	6/26/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.022	Cash receipts	6/27/2024	6/27/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.023	Payment card processing	7/8/2024	7/8/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.024	Year end processing	7/9/2024	7/9/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.025	Year end forms printing	7/9/2024	7/9/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.026	Time Clock Plus	7/10/2024	7/10/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.027	Plan IT	7/11/2024	7/11/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.028	AladTec	7/12/2024	7/12/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.029	Tyler Ener Gov	7/15/2024	7/15/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.030	Munilink	7/16/2024	7/16/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.031	IBM Maximo	7/17/2024	7/17/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.032	RTA Fleet	7/18/2024	7/18/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.033	NeoGov	7/18/2024	7/18/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.034	IT enterprise architecture & integrations IT	7/19/2024	7/19/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.035	hardware	7/22/2024	7/22/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.036	General reporting	7/23/2024	7/23/2024		1.5		2	\$ 1,012.50			\$ 1,012.50	2	6.2
P1.037	Process Documentation	7/24/2024	7/24/2024			1.5	2	\$ 870.00			\$ 870.00	2	6.2
P1.038	Accounting and finance Collections	6/17/2024	6/24/2024	0.5	1	1.5	3	\$ 1,695.00			\$ 1,695.00	3	6.2
P1.039	and receivables Purchasing &	6/19/2024	6/26/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.040	payables	6/20/2024	6/27/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.041	Inventory management	6/20/2024	6/27/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.042	Fleet management	6/24/2024	7/20/2024	0.5	1	1.5	3	\$ 1,695.00			\$ 1,695.00	3	6.2
P1.043	Fixed assets	6/24/2024	7/1/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.044	Emergency services	7/12/2024	7/19/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.045	Property assessments & inspections	7/15/2024	7/22/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.046	Payroll processing	6/25/2024	7/2/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.047	Employee access	6/26/2024	7/3/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.048	Cash processing	6/19/2024	6/26/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.049	Bank reconciliation	6/19/2024	6/26/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.050	Reporting	7/15/2024	7/22/2024		1	1.5	3	\$ 1,470.00			\$ 1,470.00	3	6.2
P1.051	Technical data integrations	7/22/2024	7/29/2024	0.5	1	1.5	3	\$ 1,695.00			\$ 1,695.00	3	6.2
P1.052	Future State Requirements	7/29/2024	8/5/2024	0	6	6	6	\$ 5,280.00		\$ 4,500.00	\$ 9,780.00	6	6.2
P1.053	Workshop 1	7/29/2024	7/30/2024		2	2	2	\$ 1,760.00	Yes	\$ 4,500.00	\$ 6,260.00	2	6.2
P1.054	Workshop 2	7/31/2024	8/1/2024		2	2	2	\$ 1,760.00			\$ 1,760.00	2	6.2
P1.055	Workshop 3	8/2/2024	8/5/2024		2	2	2	\$ 1,760.00			\$ 1,760.00	2	6.2
P1.056	Requirements Finalization	8/12/2024	8/29/2024	5	6.5	6	6	\$ 7,717.50		\$ -	\$ 7,717.50	25	6.2
P1.057	Process documentation review	8/12/2024	8/12/2024	2	2	2	2	\$ 2,660.00			\$ 2,660.00	10	6.2
P1.058	Final process approvals Final	8/12/2024	8/19/2024		1	1	1	\$ 880.00			\$ 880.00	4	6.2
P1.059	requirements review	8/12/2024	8/19/2024	1	1	1	1	\$ 1,330.00			\$ 1,330.00	1	6.2
P1.060	Requirements prioritization Final	8/20/2024	8/27/2024	2	2	2	2	\$ 2,660.00			\$ 2,660.00	10	6.2
P1.061	Requirements approval	8/19/2024	8/29/2024		0.5			\$ 187.50			\$ 187.50		6.2
P1.062	RFP Development	8/20/2024	9/5/2024	3.25	5	6	9.5	\$ 7,155.00		\$ -	\$ 7,155.00	6.5	6.3
P1.063	Preparation of requirements packet Preparation	8/29/2024	8/4/2024	0.5	1.5	1.5	2.75	\$ 1,826.25			\$ 1,826.25		6.3
P1.064	of process document addendum RFP draft	8/20/2024	8/24/2024		0.5	0.5	1.25	\$ 608.75			\$ 608.75		6.3
P1.065	creation	8/24/2024	8/28/2024	0.75	1	2	4	\$ 2,172.50			\$ 2,172.50		6.3
P1.066	Completed RFP document review	9/3/2024	9/5/2024	1.5	1.5	1.5	1.5	\$ 1,995.00			\$ 1,995.00	6	6.3
P1.067	Final RFP packet approval	9/5/2024	9/5/2024	0.5	0.5	0.5		\$ 552.50			\$ 552.50	0.5	6.3
P1.068	General Project Administration	6/3/2024	9/6/2024	13.5	39	37	31	\$ 38,035.00		\$ -	\$ 38,035.00	15	
P1.069	Weekly status report creation	6/10/2024	9/6/2024		4	4	8	\$ 4,420.00			\$ 4,420.00		
P1.070	Weekly status meetings	6/12/2024	9/6/2024	3.5	7	7	7	\$ 7,735.00			\$ 7,735.00	7	
P1.071	Workshop scheduling	6/3/2024	9/6/2024				6	\$ 1,350.00			\$ 1,350.00	2	

P1.072	Internal document review and QA	6/11/2024	9/6/2024	8	16	10	4	\$ 13,300.00		\$ 13,300.00			
P1.073	Scheduling & rescheduling of meetings	6/17/2024	9/6/2024			4		\$ 1,120.00		\$ 1,120.00			
P1.074	General correspondence	6/3/2024	9/6/2024	2	12	12	6	\$ 10,110.00		\$ 10,110.00		6	
P2.000	Phase 2 - Evaluation & Selection	9/10/2024	3/18/2025	29	109.75	112	123.75	\$ 113,410.00		\$ 5,000.00	\$ 118,410.00	121.75	
P2.001	Phase Initialization	9/10/2024	9/11/2024	1.5	2	1.5	2	\$ 2,295.00		\$ -	\$ 2,295.00	2	6.4
P2.002	Initial scheduling and timeline planning	9/10/2024	9/11/2024	0.25	0.5			\$ 300.00		\$ 300.00			6.4
P2.003	Align on scoring methodology	9/10/2024	9/11/2024	0.25	0.5	0.5	1	\$ 665.00		\$ 665.00		1	6.4
P2.004	Conduct final RFP review meeting	9/11/2024	9/11/2024	1	1	1	1	\$ 1,330.00		\$ 1,330.00		1	6.4
P2.005	RFP Responses	9/16/2024	10/25/2024	2.5	4.5	6	4.75	\$ 5,561.25		\$ -	\$ 5,561.25	2	6.4
P2.006	Release RFP and gather responses	9/16/2024	10/16/2024	0.5	1.5	2	0.75	\$ 1,516.25		\$ 1,516.25			6.4
P2.007	Consolidate responses	10/16/2024	10/22/2024		0.5	1.5	2	\$ 1,057.50		\$ 1,057.50			6.4
P2.008	Hold initial review and scoring meeting	10/23/2024	10/23/2024	2	2	2	2	\$ 2,660.00		\$ 2,660.00		2	6.4
P2.009	Select application finalists	10/23/2024	10/25/2024		0.5	0.5		\$ 327.50		\$ 327.50			6.4
P2.010	Application Demos	9/17/2024	12/18/2024	0.75	22	17	37.75	\$ 21,841.25		\$ -	\$ 21,841.25	37.5	6.4
P2.011	Write demo scripts	9/17/2024	10/4/2024	0.5	2.25	3.5	6	\$ 3,398.75		\$ 3,398.75		6	6.4
P2.012	Send demo scripts and schedule demos	10/28/2024	11/2/2024		0.25		0.25	\$ 150.00		\$ 150.00			6.4
P2.013	Conduct Application Demos and Reviews	11/4/2024	12/16/2024	0	18	12	30	\$ 16,860.00		\$ -	\$ 16,860.00	30	6.4
P2.014	Demo 1	11/4/2024	11/8/2024		4		4	\$ 2,400.00		\$ 2,400.00		4	6.4
P2.015	Review 1	11/5/2024	11/11/2024		2		2	\$ 1,200.00		\$ 1,200.00		2	6.4
P2.016	Demo 2	11/11/2024	11/15/2024			4	4	\$ 2,020.00		\$ 2,020.00		4	6.4
P2.017	Review 2	11/12/2024	11/18/2024			2	2	\$ 1,010.00		\$ 1,010.00		2	6.4
P2.018	Demo 3	11/18/2024	11/22/2024		4		4	\$ 2,400.00		\$ 2,400.00		4	6.4
P2.019	Review 3	11/19/2024	11/25/2024		2		2	\$ 1,200.00		\$ 1,200.00		2	6.4
P2.020	Demo 4	12/2/2024	12/6/2024			4	4	\$ 2,020.00		\$ 2,020.00		4	6.4
P2.021	Review 4	12/3/2024	12/9/2024			2	2	\$ 1,010.00		\$ 1,010.00		2	6.4
P2.022	Demo 5	12/9/2024	12/13/2024		4		4	\$ 2,400.00		\$ 2,400.00		4	6.4
P2.023	Review 5	12/10/2024	12/16/2024		2		2	\$ 1,200.00		\$ 1,200.00		2	6.4
P2.024	Update scoring based on demos	12/16/2024	12/18/2024	0.25	1.5	1.5	1.5	\$ 1,432.50		\$ 1,432.50		1.5	6.4
P2.025	Perform final application scoring and selection	12/19/2024	12/19/2024	1.5	1.5	1.5	1.5	\$ 1,995.00	Yes	\$ 2,500.00	\$ 4,495.00	1.5	6.4
P2.026	Perform final application contract negotiations	12/19/2024	1/3/2025	1	2			\$ 1,200.00		\$ 1,200.00		2	6.4
P2.027	Finalize budget forecast for software costs	1/6/2025	1/6/2025	0.5	2	1.5	0.75	\$ 1,563.75		\$ 1,563.75		0.75	6.4
P2.028	Draft RFP for technical implementation partner	1/6/2025	1/10/2025	0	3	4.5	3	\$ 3,060.00		\$ -	\$ 3,060.00	0	6.4
P2.029	Itemize full scope of project	1/6/2025	1/8/2025		1	1.5		\$ 795.00		\$ 795.00			6.4
P2.030	Identify key customizations and solution areas	1/7/2025	1/10/2025		2	3	3	\$ 2,265.00		\$ 2,265.00			6.4
P2.031	Review and finalize implementation partner RFP	1/13/2025	1/13/2025	0.5	0.5	2	4	\$ 1,872.50		\$ 1,872.50		4	6.4
P2.032	Release implementation partner RFP	1/15/2025	1/15/2025		0.25			\$ 93.75		\$ 93.75			6.4
P2.033	Receive RFP responses	1/15/2025	3/5/2025	2.25	12	12	12	\$ 11,572.50		\$ -	\$ 11,572.50	14	6.4
P2.034	Score responses	1/15/2025	2/4/2025	0.25	2	2	2	\$ 1,872.50		\$ 1,872.50		4	6.4
P2.035	Conduct solution demos	2/10/2025	2/28/2025		8	8	8	\$ 7,040.00		\$ 7,040.00		8	6.4
P2.036	Score solution approaches	2/24/2025	3/4/2025	1	1	1	1	\$ 1,330.00		\$ 1,330.00		1	6.4
P2.037	Finalize system implementation partner selection	3/5/2025	3/5/2025	1	1	1	1	\$ 1,330.00		\$ 1,330.00		1	6.4
P2.038	Project Budget and Timing	3/10/2025	3/18/2025	0.5	4	5	3	\$ 3,800.00		\$ 2,500.00	\$ 6,300.00	3	6.4
P2.039	Finalize implementation budget	3/10/2025	3/14/2025	0.25	2			\$ 862.50	Yes	\$ 2,500.00	\$ 3,362.50	1	6.4
P2.040	Finalize project timing and cost timing	3/10/2025	3/14/2025	0.25	1	1	1	\$ 992.50		\$ 992.50		1	6.4
P2.041	Build project budget to actual tracker	3/12/2025	3/18/2025		1	4	2	\$ 1,945.00		\$ 1,945.00		1	6.4
P2.042	General Project Administration	9/10/2024	3/18/2025	18	56	61	55	\$ 58,555.00		\$ -	\$ 58,555.00	55	
P2.043	Weekly status report creation	9/10/2024	3/18/2025	4	9	10	18	\$ 12,025.00		\$ 12,025.00		18	
P2.044	Weekly status meetings	9/10/2024	3/18/2025	4	9	9	9	\$ 9,720.00		\$ 9,720.00		9	
P2.045	Review and demo scheduling	9/10/2024	3/18/2025	2	4	4	4	\$ 4,420.00		\$ 4,420.00		4	
P2.046	Internal document review and QA	9/10/2024	3/18/2025	6	12	12	8	\$ 12,360.00		\$ 12,360.00		8	
P2.047	Scheduling & rescheduling of meetings	9/10/2024	3/18/2025		2	6	4	\$ 3,330.00		\$ 3,330.00		4	
P2.048	General correspondence	9/10/2024	3/18/2025	2	20	20	12	\$ 16,700.00		\$ 16,700.00		12	
P3.000	Phase 3 - Software Implementation	3/31/2025	5/2/2025	9.25	98	0	183.5	\$ 82,200.00		\$ 11,500.00	\$ 93,700.00	159.25	
P3.001	Mobilize	3/31/2025	4/4/2025	3	3.5	0	5.5	\$ 3,900.00		\$ 2,500.00	\$ 6,400.00	5.5	6.5
P3.002	Planning & Team Mobilization	3/31/2025	4/4/2025	1.5	2		4	\$ 2,325.00		\$ 2,325.00		4	6.5
P3.003	Vision & Value Definition + Kickoff	3/31/2025	4/4/2025	1.5	1.5		1.5	\$ 1,575.00	Yes	\$ 2,500.00	\$ 4,075.00	1.5	6.5
P3.004	Analyze	4/7/2025	5/2/2025	1.5	13	0	21	\$ 10,275.00		\$ 3,000.00	\$ 13,275.00	21	6.5
P3.005	Data Migration Strategy & Approach	4/7/2025	4/18/2025	0.5	5		11	\$ 4,575.00		\$ -	\$ 4,575.00	11	6.5
P3.006	Determine migration approach	4/7/2025	4/11/2025	0.5	1.5		4	\$ 1,687.50		\$ 1,687.50		4	6.5
P3.007	Review data structure	4/7/2025	4/18/2025		2		3	\$ 1,425.00		\$ 1,425.00		3	6.5
P3.008	Validate go-forward data structure	4/14/2025	4/15/2025		1.5		4	\$ 1,462.50		\$ 1,462.50		4	6.5
P3.009	Intergration Architecture & Approach	4/14/2025	5/2/2025	1	8	0	10	\$ 5,700.00		\$ 3,000.00	\$ 8,700.00	10	6.5
P3.010	Determine interim integration approach for the ERP	4/14/2025	5/2/2025	0.5	4		4	\$ 2,625.00	Yes	\$ 3,000.00	\$ 5,625.00	4	6.5
P3.011	Determine interim process for managing data in existing systems	4/28/2025	5/2/2025	0.5	4		6	\$ 3,075.00		\$ 3,075.00		6	6.5
P3.012	Design & Build			0.5	6	0	10	\$ 4,725.00		\$ -	\$ 4,725.00	10	6.5
P3.013	Configuration, Workflow Updates, and Development			0.5	6	0	10	\$ 4,725.00		\$ -	\$ 4,725.00	10	6.5
P3.014	Build development / configuration backlog			0.5	0.5		1	\$ 637.50		\$ 637.50		1	6.5
P3.015	Update technical solution documents as needed				1.5		1	\$ 787.50		\$ 787.50		1	6.5
P3.016	Update change management plan				0.25		1	\$ 318.75		\$ 318.75		1	6.5
P3.017	Update project progress				0.5		1.5	\$ 525.00		\$ 525.00		1.5	6.5
P3.018	Update RAID log and escalate issues				0.25		1.5	\$ 431.25		\$ 431.25		1.5	6.5
P3.019	Update existing process documentation				1		1.5	\$ 712.50		\$ 712.50		1.5	6.5
P3.020	Incremental Demos				1.5		1.5	\$ 900.00		\$ 900.00		1.5	6.5
P3.021	Remediate end user feedback				0.5		1	\$ 412.50		\$ 412.50		1	6.5
P3.022	Cut-Over and Go Live			3.5	70.5	0	140	\$ 59,512.50		\$ 6,000.00	\$ 65,512.50	120	6.5

P3.023	Integration and Data Migration Build & Demos		0.5	8.5	0	16	\$	7,012.50	\$	-	\$	7,012.50	8	6.5	
P3.024	Define ETL approach			2.5		4	\$	1,837.50			\$	1,837.50	2	6.5	
P3.025	Build ETL data scripts		0.5	3		6	\$	2,700.00			\$	2,700.00	2	6.5	
P3.026	Build migration scripts			3		6	\$	2,475.00			\$	2,475.00	4	6.5	
P3.027	Validate		0.5	26	0	58	\$	23,025.00	\$	-	\$	23,025.00	46	6.5	
P3.028	Define UAT scenarios and end user test scripts			4		10	\$	3,750.00			\$	3,750.00	4	6.5	
P3.029	Develop conference room pilot script		0.5	4		10	\$	3,975.00			\$	3,975.00	4	6.5	
P3.030	Complete data migration testing			2		6	\$	2,100.00			\$	2,100.00	6	6.5	
P3.031	Complete integration testing	Usually completed within 4 - 12 weeks depending on the scope and complexity of the implementation.		3		12	\$	3,825.00			\$	3,825.00	12	6.5	
P3.032	Remediate identified issues			6		8	\$	4,050.00			\$	4,050.00	8	6.5	
P3.033	Regression & User Acceptance Testing			5		8	\$	3,675.00			\$	3,675.00	8	6.5	
P3.034	Define go/no-go requirements			2		4	\$	1,650.00			\$	1,650.00	4	6.5	
P3.035	Train & Deploy		0.5	34	0	64	\$	27,375.00	\$	6,000.00	\$	33,375.00	64	6.5	
P3.036	Develop Train the trainer materials		0.5	6		20	\$	6,975.00	Yes	\$	3,000.00	\$	9,975.00	20	6.5
P3.037	Train the Trainer			6		16	\$	5,850.00			\$	5,850.00	16	6.5	
P3.038	Complete conference room pilot			4		4	\$	2,400.00			\$	2,400.00	4	6.5	
P3.039	Complete end user training			8		8	\$	4,800.00			\$	4,800.00	8	6.5	
P3.040	Production Deployment & Cutover			2		10	\$	3,000.00	Yes	\$	3,000.00	\$	6,000.00	10	6.5
P3.041	Go Live & Support			8		6	\$	4,350.00			\$	4,350.00	6	6.5	
P3.042	Go/No Go		2	2		2	\$	2,100.00			\$	2,100.00	2	6.5	
P3.043	General Project Administration		0.75	5	0	7	\$	3,787.50			\$	3,787.50	2.75		
P3.044	Weekly status report creation			0.25		1	\$	318.75			\$	318.75			
P3.045	Weekly status meetings		0.5	0.5		0.5	\$	525.00			\$	525.00	0.5		
P3.046	Training and collaboration scheduling	Estimated level of effort per week through out the implementation		0.5		1	\$	412.50			\$	412.50			
P3.047	Internal document review and QA			1.5		1.5	\$	900.00			\$	900.00			
P3.048	Scheduling & rescheduling of meetings			0.25		1	\$	318.75			\$	318.75	0.25		
P3.049	General correspondence		0.25	2		2	\$	1,312.50			\$	1,312.50	2		

Appendix C: Required forms

9. Enterprise Resource Planning Software Selection Advisory Services

Date: 4/10/2024

City of Superior, Wisconsin

I/we, the undersigned, being familiar with all the factors and other conditions affecting the work, are hereto attaching the following documents:

- 1) Subcontractors List
- 2) Addenda Acknowledgment
- 3) Qualification & Evaluation Checklist
- 4) References

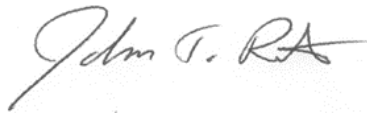
I/we, the undersigned, hereby propose to furnish all labor, tools, materials, skills, equipment and all else necessary to execute the work, in accordance with the specifications and are hereby submitting the following proposal:

Total Cost (Not-to-Exceed): \$ \$695,000

Amount in written figures: Six hundred and ninety five thousand USD

Completion Date: 4/10/2024 (date)

Interested firms may, at their discretion, suggest additional services not explicitly requested by this RFP. Proposals should include line item costs for additional services. Please note that additional services may or may not be awarded by the City and that costs for additional services are excluded from the base proposal.



SIGNATURE _____ Date 4/10/2024

Print Name John Runte

Name of Company Baker Tilly US, LLP

Address 790 North Water Street, Suite 2000. Milwaukee, WI 53202

Phone 414-777-5371 Fax N/A

E-mail Address john.runte@bakertilly.com

10. Subcontractors Listing (Must be submitted with proposal.)

Enterprise Resource Planning Software Selection Advisory Services

The undersigned agrees to employ the following listed **subcontractors** for the following enumerated classes of work and not to alter or add to such list without the written consent of the City of Superior, WI. Use separate sheet as necessary.

	<u>SUBCONTRACTOR</u>	<u>CLASS OF WORK</u>
1)	<u>N/A</u>	<u></u>
2)	<u></u>	<u></u>
3)	<u></u>	<u></u>
4)	<u></u>	<u></u>
5)	<u></u>	<u></u>

Submitted by: COMPANY Baker Tilly US, LLP
ADDRESS 790 North Water Street, Suite 2000. Milwaukee, WI 53202
COMPANY REPRESENTATIVE John Runte

11. Addenda Acknowledgement (Must be submitted with Proposal)

Enterprise Resource Planning Software Selection Advisory Services

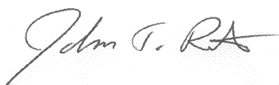
I/we hereby acknowledge receipt of the following addenda(s):

Addendum No. 1 Dated 4/1/2024
Addendum No. Dated
Addendum No. Dated
Addendum No. Dated

I/we further certify that no agreement has been entered into to prevent competition for said work and that I/we carefully examined the site where the work is to take place, and the plans, specifications, form of contract and all other contract documents.

I/we further agree to enter into the contract, as provided in the contract documents, under all the terms, conditions and requirements of those documents.

* If no addenda were issued, the consultant/firm shall so indicate and sign this document.

Baker Tilly US, LLP
Company _____


Representative Signature

12. Qualification Evaluation Checklist

Owner: Baker Tilly US, LLP

Contact Person: John Runte

Address: 790 North Water Street Suite 2000

City: Milwaukee State: WI

Zip: 53202

Telephone: 414-777-5371

Instructions:

1. When filling out the checklist check "YES" only to those services provided "in-house" by your firm (or prior experience of key personnel anticipated to perform a substantial amount of the project work) and check "SUB" for services you intend to subcontract out. List the subcontracting firm in the "Comments/Explanation" area.
2. Respondents are encouraged to add comments and to attach more detailed information where appropriate in response to checklist items. Such clarification can greatly assist the evaluation process. **Firms may include other information as they deem appropriate.**
3. Attach to this checklist any appropriate licenses, certification, degrees, or appropriate training that will assist in qualifying your firm for these services.
4. Consultant qualifications will be determined using this checklist along with the information provided as outlined in the "Requirements for Statement of Qualifications".
5. Firms are expected to answer "YES" to some of the checklist items, but not all of them.
6. False, inaccurate or misleading information shall be grounds for disqualification at any time during and after the selection process. When in doubt attach a detailed answer or call for clarification.

Yes	Sub	No	#	Question
			1.	How many years has your firm been engaged in the consulting business under the present firm name? <u>Since 2009 but more than 90 years</u> under prior name.
X	<input type="checkbox"/>	<input type="checkbox"/>	2.	Has your firm ever failed to complete any work awarded to you? Comment/Explanation: Our firm strives to meet and exceed client expectations during an engagement. Occasionally, due to professional standards such as independence or other issues outside of Baker Tilly's control, our firm is unable to complete an engagement.

Yes	Sub	No	#	Question
X	<input type="checkbox"/>	<input type="checkbox"/>	3.	<p>Has your firm ever defaulted on a contract?</p> <p>Comment/Explanation: As a large accounting/consulting firm, Baker Tilly may have contracts terminated for a variety of reasons. In the past, we have lost clients due to the following: mandatory audit firm rotation, project completion, mergers and acquisitions, competitive bidding. We cannot disclose the information surrounding these relationships without each organization's explicit, written permission.</p>
X	<input type="checkbox"/>	<input type="checkbox"/>	4.	<p>Has your firm ever had claims filed for errors and omissions or been sued for services you provided?</p> <p>Comment/Explanation: In the normal course of business as a large accounting and advisory firm, Baker Tilly may be made a party to litigation alleging various common law and statutory violations. While Baker Tilly expects to resolve all pending matters without any material detrimental impact to the firm, like most accounting firms of any size, the firm does not disclose or discuss its litigation. Litigation is generally disposed of in the normal course of business and under any applicable professional indemnity insurance policy.</p>
X	<input type="checkbox"/>	<input type="checkbox"/>	5.	<p>Is your firm willing to provide (at no cost to the City) an on-site presentation to the City regarding your firm's qualifications?</p> <p>Comment/Explanation: We would be happy to join you and share sample deliverables and existing requirements inventories that can accelerate the pace of execution.</p>
X	<input type="checkbox"/>	<input type="checkbox"/>	6.	<p>Have you reviewed the example of the service contract attached and are willing to sign a similar agreement?</p> <p>Comment/Explanation: If selected, we will require the ability to propose additional terms and negotiate mutually acceptable revisions to these sections prior to executing a final contract.</p>

13. Statement of Qualifications Reference Form

Applicant Firm Name: Baker Tilly US, LLP
Contact Person: John Runte John.Runte@bakertilly.com
Address: 790 North Water Street, Suite 2000
City, State, and Zip Code: Milwaukee, WI 53202
Telephone: 414-777-5371

Reference #1

Owner or Company Name: City of Goshen, IN
Contact Person: Tina Bontrager Elkhart County Treasurer (formerly City of Goshen Clerk-Treasurer)
Type of Service(s) Provided: ERP needs assessment, system selection and implementation services
Calendar Year(s) of Service(s) Provided: 2022 / 2023
City, State, and Zip Code: Goshen, IN 46528
Telephone: +1 (574) 535 6759 tbontrager@elkhartcounty.com

Reference #2

Owner or Company Name: Village of Rolling Meadows, IL
Contact Person: Melissa Gallagher mgallagher@lakecountyil.gov
Type of Service(s) Provided: ERP needs assessment, system selection and implementation services
Calendar Year(s) of Service(s) Provided: 2016/2017
City, State, and Zip Code: Rolling Meadows, IL 60008
Telephone: +1 (847) 377 2929

Reference #3

Owner or Company Name: City of Highland Park, IL
Contact Person: Julie Logan jlogan@cityhpil.com
Type of Service(s) Provided: ERP needs assessment and system selection
Calendar Year(s) of Service(s) Provided: 2018/2019
City, State, and Zip Code: Highland Park, IL 60035
Telephone: +1 (847) 926 1020

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

What makes Baker Tilly different from other firms? We have significant “accelerator assets” including stock requirements inventories from numerous public sector evaluation projects.

Understanding your needs to help achieve your objectives

The City of Superior is looking for a successful ERP strategy and software selection process. The following table details our understanding of your most critical needs and how we plan to address them with additional details provided as requested on our qualifications for ERP evaluation services.

WHAT WE HEARD YOU NEED	HOW BAKER TILLY WILL MEET YOUR NEEDS
<p>National and local experience in financial systems & ERP powered by the “technology-agnostic” approach you desire</p>	<ul style="list-style-type: none"> • Completion of more than 100 ERP software evaluations and selections, more than 75 software implementations and experience working with 30 different software packages. We understand your requirement for a “technology-agnostic” approach and working as your advocate as you decide on your future technology solution. • Expertise in “best-of-breed,” and third-party niche needs assessments, roadmaps, independent selection and implementation advisory services. We also have significant independent verification and validation experience for formal “gate reviews” on project quality health checks if we are engaged for the implementation phase of the project. • Deep understanding of the current public sector ERP market, as well as comprehensive knowledge of software infrastructure, hardware requirements or cloud infrastructure requirements, associated costs and post-implementation support
<p>Grant accounting / Fund accounting & city government experience</p>	<ul style="list-style-type: none"> • Significant experience with 20+ year consulting veterans working in some of the most innovative municipal, county and state agencies across the nation • Consultants that routinely address grant & fund accounting requirements and the unique requirements of city government.
<p>Proven methodology and immediate results</p>	<ul style="list-style-type: none"> • Approach centered on working with your staff to create a long-term strategy and vision for the City of Superior that meets today's needs and plans for the future • Experience in both functional process redesign and system selection that enables us to manage your project with a keen eye toward eliminating manual processes, implementing modern best practices, and aligning with the overall ERP strategy • Experience with ERP assessments to provide you with constructive suggestions for quick wins that you can implement today to improve current functional / departmental processes and enhance your operations
<p>Value for fees paid</p>	<ul style="list-style-type: none"> • We “pull design forward” associated with your software evaluation process limiting the risk of significant surprises as you move into implementation • We have significant implementation phase credentials and look forward to staying as your client advocate in managing the implementation phase of the project • Significant senior team involvement to deliver timely, responsive service • Streamlined approach pairing technical expertise with innovative technology • Significant assets from similar and relevant organizations to accelerate your timeline

Project Accelerators

Our experience completing ERP evaluations for other municipalities provides The City of Superior with opportunities to accelerate progress by starting with other software requirements as an input to your team's thinking about key requirements.

A Sample of Prior Software Requirement Inventories

We have over 1000 software requirements from other public sector software evaluations which your team can leverage as we collectively work through defining your critical and unique requirements lists. The sample below is just a snippet of a few GL requirements (over 250 GL requirements in that one tab alone). In addition to a Financials workbook, we have requirements for the majority of major departments across the municipal landscape. In addition, we have integration requirements, technical infrastructure requirements, conversion requirements and more to accelerate your team's thinking as it relates to critical and unique requirements.

Appendix 4: Business Requirements - Finance		Requirements Response Rules:						
The following functional, technical, workflow and reporting needs provide the minimum requirements of Hennepin County. Please review the items carefully and respond in accordance with the requirements response rules provided. Any partial response will be deemed as an invalid response. MANDATORY: EVERY REQUIREMENT (Req#) MUST HAVE A RESPONSE TO BE CONSIDERED COMPLETE.		1. Mandatory: Proposers are required to input one response per requirement using the drop down list provided. 2. Proposers are requested to itemize estimated costs for all modification requirements. 3. Proposers are requested to list the third party product name for all Third Party Product requirements. 4. Proposers are requested to mark yes or no to whether the implementation costs of this functionality is included in their cost proposal. 5. Proposers are requested to mark yes or no to whether the training costs of this functionality is included in their cost proposal. 6. If a subcontractor is implementing or providing training for this functionality, please indicate the name of the subcontracting firm responsible for this functionality. 7. Proposers are required to list the version number for all functionality proposed to the County. Response Types: F= Fully provided out of the box, CO = Provided through configuration, Mod= Provided through a technical modification of the software, TP = Third party software required, NA = Not available, RT = Provided through a reporting tool, BE = In beta						
		1. Response	2. Costs for Mod response	3. Third Party Application for TP response	4. Included in Implementation Costs Yes/No	5. Included in training costs Yes/No	6. Subcontractor	7. Version Number
Req#	PROCESS							
	General Ledger							
	GL Set Up and Design							
1.00	Ability to set up a flexible General Ledger structure							
2.00	Ability to set up a chart of accounts (COA) coding structure such as Fund, Center, Account, Department, Division, Program, Service, Object, Project, Line of Business and other criteria.							
3.00	Ability to set up controls within every module in the system around every element within the General Ledger (e.g., limit charges to active funds, accounts or centers).							
4.00	Ability to validate the chart of accounts (i.e., department, cost center) by field.							
5.00	Ability to allow/sallow combinations of elements of the code structure (e.g. allow Public Aid Assistance accounts to be used only in the Human Services Fund).							
6.00	Ability to set up reporting requirements for the State of Minnesota Chart of Accounts structure.							
7.00	Ability to set up and link the State COA with the County's COA for financial tracking and reporting.							

General Ledger | Budget | Capital Assets | Cost Allocation | Accounts Receivable | Grants | Project | Banking

Firm overview

Our team members support the City of Superior with reliable solutions that deliver measurable enhancements to your organization and those you serve.

Offering our resources: Baker Tilly consulting at a glance

Making decisions today to shape tomorrow is especially challenging in these extraordinary times. **Superior requires a firm with consulting specialists who combine functional experience, industry knowledge and technical expertise to respond to your immediate needs and support you as your organization evolves. Baker Tilly is that firm.**

When you work with Baker Tilly on your advisory needs, you work alongside an agile team that drives transformation by supporting you with a flexible engagement model that is “right-sized” to your unique culture and circumstances. We dedicate ourselves to delivering industry insights, efficiencies, creativity and forward-thinking solutions. More than anything, Superior will receive an exceptional experience for your leadership team, governance team, internal process owners and — ultimately — your constituents.

Below are some key facts about our consulting practice, including the depth of resources that stand ready to support your core project team:



6,700
team members



2,400+
consulting
team members



170+
consulting
partners



40%
of Baker Tilly's \$1.58B in
firm revenue



20+
years of consulting
experience



50+
U.S. office
locations



250+
workplace and culture
awards

COMPREHENSIVE EXPERIENCE TO SERVE YOU

The City of Superior will receive support and guidance from a respected advisory CPA firm that continues to grow.

Meeting you where you are on the enterprise journey

Regardless of the solution, we meet you where you are and will tailor our consulting approach to meet your specific needs. This means hand-selecting and assembling your service team to offer the right functional experience, industry insight and technical expertise.

Many of our team members have real-world experience implementing ERP solutions across different industries, including public sector. This empowers them to dive in with an understanding of your day-to-day from day one. We believe in a small team delivery model to work “side-by-side” (in person or virtually) with your team.

The City of Superior will receive thoughtful, strategic guidance from a responsive engagement team who will serve you throughout this project, including digital transformation specialists who will deliver big-picture insights and best practices.

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Support from Baker Tilly Digital

Digital transformation provides your organization the opportunity to become more efficient, transparent and insightful so you can deliver a more meaningful relationship with your customers. However, leveraging advancements in new technology and making decisions today to shape tomorrow is never easy.

Baker Tilly Digital can integrate your digital strategies, provide innovative thinking and deploy advanced technology solutions to help you unlock the true potential of your organization.

Baker Tilly Digital assists our clients in leveraging new technology to solve their most pressing problems and to capitalize on new opportunities. Our team of experienced professionals includes advanced technologists, data scientists, intelligent automation practitioners and emerging technology leaders that bring innovative solutions regarding the introduction, prototyping, design and implementation of advanced technology solutions.

The team is focused on the integration of advanced technologies with core business transformational services to help you successfully navigate the complexities of digital transformations.

Our digital service offerings

Baker Tilly Digital is proud to offer our clients a range of services. An overview of our services is provided in the graphic below.



Digital strategy

We understand how a cultivated and tactical plan enables your goals and better prepares your company for digital transformation. Our digital strategy team is here to guide your team with a structured approach to enable organizational change, streamline operations and drive greater return from achieving your digital transformation goals.



Cloud services

Chances are, the business environment you face today looks quite a bit different than just a few years ago. Fortunately, cloud is revolutionizing business in ways that can help you keep up, giving life to new products and services. Baker Tilly Digital can implement, scale and secure your cloud technology to help you leverage it for innovation and growth.



Data solutions

Capturing the data that matters most and bringing it into focus is no trivial matter. Rely on our experience to drive your business forward. At Baker Tilly Digital we help our clients derive value from data, whether it's through advanced machine learning, data visualization or working to implement new data processes for a "single source of truth."



Enterprise solutions

Selecting, implementing or optimizing an enterprise technology solution is a complex endeavor. Our experienced team works with you to understand your business and pain points, highlight opportunities and develop enterprise solutions options attune to your needs. It's not just what you implement, it's how you transform the business that will make a lasting difference.



Application services

Introducing innovative applications and services into uncharted territory opens you up to opportunity — and risk. We help you successfully blaze the trail. Baker Tilly Digital's experience enables us to envision and create custom solutions that enhance customer engagement and refine your operational efficiency.

Delivering specialized expertise to our public sector clients

Baker Tilly has served public sector clients since our establishment more than 90 years ago.

Unlike many other advisory firms, Baker Tilly is organized by industry, not service line. What does this mean for The City of Superior? It means you will be served by a carefully selected team that blends our government-focused professionals with experienced specialists in the activities executed by city personnel on a day-to-day basis. You will work with a knowledgeable team that understands your specific challenges and provides innovative solutions to help you overcome them.



Local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other industries. Recognizing this complexity and eager to serve as a true valued advisor to the public sector, Baker Tilly formalized its dedicated public sector specialization more than 50 years ago. **Today, more than 375 Baker Tilly professionals** focus directly on serving governments and provide hundreds of thousands of client service hours annually to organizations like The City of Superior.

Nationwide, our public sector practice serves nearly 4,000 state and local governmental entities, including municipalities, counties, school districts, utilities, transit organizations, airports and special authorities. Several of these client groups are now served by dedicated specialists in distinct sub-practices.

Public sector: Experience that matters

		
4,000+ public sector clients	90+ years of industry experience	Serving clients nationwide

COMMITMENT TO THE PUBLIC SECTOR

Baker Tilly has been in business for more than 90 years, and public sector entities were some of our first clients.

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

You will benefit from our industry specialization in several specific ways:

- **Dedication to the public sector:** Your engagement team members work extensively with the public sector year-round. This translates into insights only experience can bring, as well as an understanding of the best ways to communicate and collaborate with public sector entities. Beyond our industry experience, we are proud to include The City of Superior in our existing client list and will bring our knowledge to this project from our financial audit relationship.
- **Specialized training and continuing education:** The City of Superior can be assured of an engagement team with the necessary skills and timely knowledge to effectively perform your engagement.
- **Industry involvement:** Members of our public sector practice are leaders in key industry organizations. Due to our work with these groups, we understand dynamic trends and consequential developments in the public sector — and will help The City of Superior best respond to them.
- **Knowledge sharing with The City of Superior:** At Baker Tilly, serving clients goes beyond delivering services – we also supply our clients with crucial thought leadership in the form of webinars, workshops, articles and our regular newsletter, CommuniTIES.

Experience and qualifications

Baker Tilly offers you a full complement of advisory solutions to address any risks and challenges you may face and maximize opportunities.

Focus on ERP consulting services

Baker Tilly has been providing digital transformation consulting services and implementations since 2000, which initially started with enterprise on-premises solutions, custom application development and SaaS solutions. Baker Tilly has successfully performed hundreds of software strategy, evaluation and implementation projects with speed, efficiency and agility for our clients over many years, allowing us to gather broad and deep vendor and product knowledge of many enterprise systems in the market today.

We have worked with clients across the United States to address system needs assessments, conduct gap evaluations and develop roadmaps, while leveraging our independent software evaluation experience.

When Baker Tilly works with clients like The City of Superior, we bring this experience, insight and research to help fuel the vision, objectives and guiding principles. We work with your subject matter specialists to understand pain points while we leverage our industry expertise to describe the future state of technology and modernization opportunities that may be suitable for you. We take into consideration any internal and external influences that drive industry change, along with the changing organizational environment of products and services, infrastructure and municipality governance models as we identify improvement opportunities.

Specialization in delivering ERP solutions to the public sector

For the past 23 years, we have consulted clients on ERP system selection and implementation. During this time, we have completed more than 100 software evaluations and more than 75 software implementations with more than 30 different products, each with detailed scoping, process improvements and project planning deliverables.

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

The client list below includes a sample client list of the last several years of relevant project experience across similar scope and complexity or project work on behalf of other clients.

CLIENT	PROJECT NAME
EMS/ERP assessments and evaluations	
Boone County, Indiana	ERP Needs Assessment
City of Branson, Missouri	ERP Support
City of Goshen, IN	ERP Implementation Services
City of Highland Park, Illinois	EMS needs assessment and system selection
City of Lake Forest, Illinois	EMS needs assessment and system selection
City of Nixa, Missouri	ERP System Selection
Chicago Community Trust	ERP Evaluation Advisory
Heritage Holdings of Lancaster County	2023 ERP Software Evaluation
Lake County, Indiana	Assessment and planning
Massapequa Water District	ERP System Selection Consulting
Village of Rolling Meadow, Illinois	EMS needs assessment, selection and implementation
City of Bettendorf, Iowa	Economic Development Review
City of Cleveland, Ohio	Economic Incentive Framework and Model
City of Portland, Maine	Executive Search and Recruitment
City of Shakopee, Minnesota	Economic Development Assistance
Hastings Area Chamber of Commerce	Executive Search and Recruitment
Hispanic Chamber of Commerce of Wisconsin	Executive Compensation Study
Stafford County, Virginia	Executive Search and Recruitment
Town of Munster, Indiana	Economic Impact Report

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Process improvement with strong emphasis on internal controls

Our heritage in financial systems and ERP work is grounded in true transformation projects compared to a software slam. We work hard to understand stakeholder experience through “journey maps,” isolating key moments of truth that must be addressed in future state process and system functionality. Our team has experience pushing system vendors on designing / configuring integrated processes that work and address key pain points identified during analysis. We can bring lean / six sigma process specialists into our projects to address more advanced needs but often not until after a software selection has been made given a desire to “start with the chosen vendor standard processes and workflows” to avoid expensive customizations.

Workflow mapping and process improvement methodologies

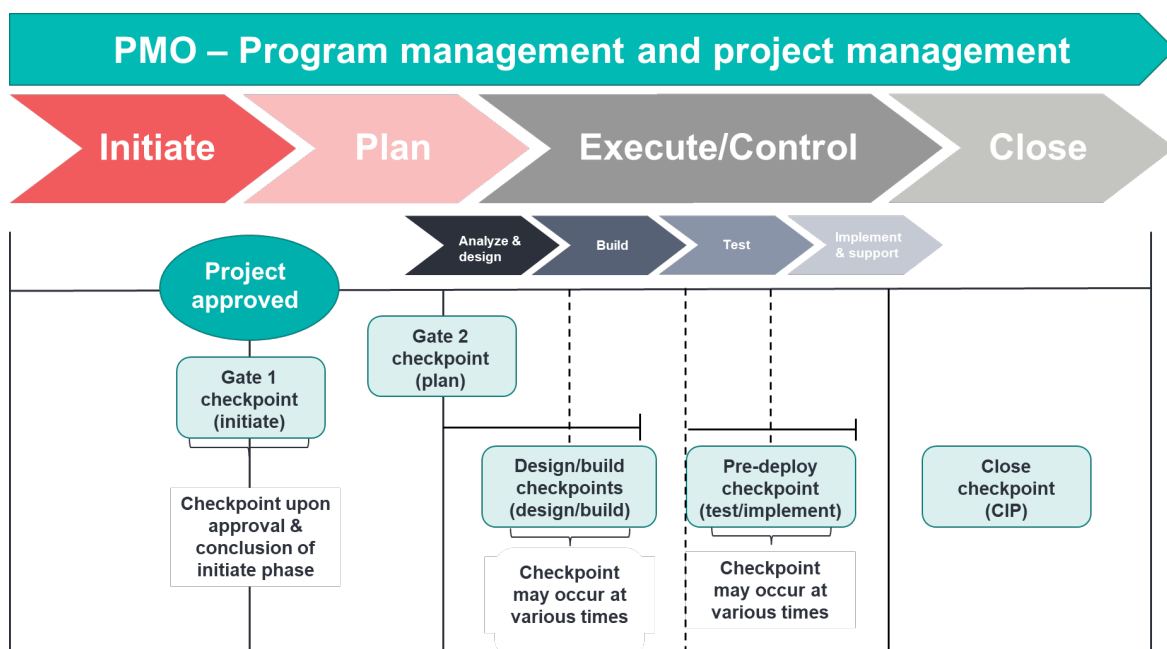
We have significant experience in most common process improvement methodologies and workflow mapping techniques including lean, six sigma, TQM, value chain mapping and more. As stated above, it's important to first understand the selected technologies' core processes and workflows to avoid costly modifications.

Contract management processes and technologies

We frequently assist our clients with contract management advice as it relates to the evaluation and selection of software solutions. In addition, many of our clients are interested in more robust add-on or best of breed contract management solutions (e.g. Ironclad). Our requirements for the software selection will be inclusive of your contract management needs.

Project management and resource planning

We subscribe to PMI's project management methodologies and believe in the value of detailed, driver-based project workplans, disciplined milestone tracking and resource leveled project workplans. **Our approach to managing the PMO follows industry best practices based on the Project Management Institute (PMI).** The graphic below maps the PMO phases against the project release life cycle stages of Analyze & Design, Build & Test and Implement & Support and illustrated our approach below. We often run a mix of traditional project management and agile methodologies for custom development components including software Customizations, Reports, Integrations, Modifications (CRIM).



Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Standard methodology deliverables

Our methodology is based on the PMI and is very specific in the deliverables the PMO will deliver across the primary initiate, plan, execute, control and close (IPECC) phases. We have documented the key deliverables for these phases in the table below:

1. Initiate	<ul style="list-style-type: none"> Identify objectives Develop project charter 	<ul style="list-style-type: none"> Stakeholder assessment
2. Plan	<ul style="list-style-type: none"> Design project management plan Define scope Plan schedule management Identify/document dependencies, resources per task/activity, activity effort/duration and schedule Define resource management Define communication strategy, approach and plan Identify quantitative/qualitative risk assessment Define risk mitigation plans per equal/quan assessment 	<ul style="list-style-type: none"> Document scope management plan Elicit requirements Document tasks and activities Financial management plan Estimate effort/cost Plan quality management lifestyle (QMLC) Define risk management process, approach and plan Stakeholder management plan Sourcing management plan
3. Execute	<ul style="list-style-type: none"> Sourcing/procurement execution Execute talent management plan Execute QMLC Execute project/service 	<ul style="list-style-type: none"> Execute communication plan Govern/monitor resources Source talent/resources Stakeholder management
4. Control	<ul style="list-style-type: none"> Govern, monitor and control project execution Manage change control Manage work stream integration Validate/confirm scope Govern, monitor and manage timeline/schedule Govern, monitor and manage financials 	<ul style="list-style-type: none"> Execute QMLC Execute communication plan Execute/review risk management process, approach and plan Govern, monitor and control sourcing/procurement Monitor stakeholder engagement
5. Close	<ul style="list-style-type: none"> Close project/service Close procurements 	<ul style="list-style-type: none"> Document lessons learned

The Baker Tilly Advantage – An Ability to Assist Through Implementation

The objective of ERP project management support services is to guide all aspects of the implementation, manage the direction of the project, maximize ROI and optimize the opportunity for process improvement while working closely with The City of Superior and the selected ERP implementation vendor.

Our project management support services set and manage the direction and timing of the project; help to create consistent, effective project communication and reporting; coordinate activities across teams to help validate integration; and manage risk and quality throughout the entire project life cycle. Our business analysis and process optimization services aid in the discovery of new process concepts, current to future state gaps and opportunities, and requirements analysis during the project implementation step.

We will work closely with and report directly to The City of Superior’s internal project lead. We will provide suggestions on methodology tools and framework necessary for a successful implementation. The key to our project management is collaboration with all members of the project team.

Baker Tilly will work with The City of Superior to leverage the data and decisions captured from the assessment in order to plan and track the status of organizational change management activities as defined by the agreed upon change management strategy and approach.

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Baker Tilly applies a disciplined approach to managing ERP implementation projects to ensure that all aspects and dimensions are properly addressed to ensure delivery of intended benefits on time, within budget and with highest quality.

ERP project management

Governance, quality and risk management	Organizational change management	ERP vendor and contract oversight	Issue resolution and progress monitoring	Benefits realization and enhancement
<p>Work closely with the City and the vendor to develop and monitor base line plans for:</p> <ul style="list-style-type: none"> • Scope management • Quality management • Governance • Project organization and roles and responsibilities • Risk response and management • Budget control 	<p>Work closely with the City to assess the organizational and individual change readiness assessment to develop and monitor:</p> <ul style="list-style-type: none"> • Change management plan • Training plan • Responsive communication and engagement planning 	<ul style="list-style-type: none"> • Verify resource competencies and performance • Oversee project activities, milestones and deliverables and conformity to SOW • Identify and escalate contract and SLA compliance issues • Conduct project quality audits • System handover and knowledge transfer 	<p>Work closely with the City and the vendor to resolve open issues and follow-up execution of action items</p> <p>Monitor and report baseline plans vs actual:</p> <ul style="list-style-type: none"> • Project progress • Risks and opportunities • Scope changes • Deliverables • Quality • Schedule changes • Resource issues • Budget analysis 	<ul style="list-style-type: none"> • Develop and monitor benefits realization plan • Measure actual benefits realized vs planned and ROI • Provide recommendations and enhancements to maximize benefits • Provide final assessment report, recommendations at the project end

Because of our extensive involvement with digital transformations, we also understand how to optimize after the initial go-live and to work toward harnessing the potential power of systems and solutions that you wanted all along. We also understand how to work within the realities of existing solutions identifying practical and pragmatic solutions when complete digital modernization is not affordable but incremental improvement can make a dramatic difference.

Baker Tilly project management methodology

Baker Tilly has performed hundreds of software strategy, evaluation, project management and implementation projects for our clients over many years, allowing us to develop a robust, tested and methodologies that are continuously improved and enhanced to meet latest technologies and business environment changes.

Baker Tilly believes each client situation is unique; that's why our project management methodology outline a flexible framework offering our clients with two levels of project management service:

- Basic level
- Full scope level

Both levels address all dimensions and aspects to deliver a highly successful project. **Basic level** is convenient for clients who meet the following assumptions:

- The client team can accurately build the business case, identify targeted outcomes and benefits, and able to monitor the realization of these benefits and build the necessary KPIs
- The organization is ready for the upcoming changes, people are aware of the impact on their jobs and capable of using the new technologies. It is easy for the client team to manage the change

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

- Business processes are flexible and can easily be adjusted to adopt the standard processes of the new ERP
- Master data (Chart of accounts, cost centers, suppliers, customers, inventory items, etc..) are well structured, cleansed and up to date. Which means there are no duplicate or obsolete records.

The full scope level was developed across many years of experience to help clients who need further assistance and direction from our experts. In addition to the activities in the basic level scope, the full scope includes:

- Development of the business case and benefits realization plan and progress KPI
- Organizational and people change assessment, change plans and change management
- Participation in business process redesign so the client can adopt the new ERP best practices
- Recommendations for master data re-design include structure and coding (Chart of accounts, cost centers, suppliers, customers, inventory items)
- Recommendations on how to prepare opening balances for migration into the new ERP
- Recommendations for data cleansing and migration to the new ERP
- Benefits realization report and enhancement recommendations at the end of the project

Change management and organizational readiness

A key component of the success or failure of a new system selection and implementation relies on how the members of the organization (and ultimate users of the system) have been engaged along the process. Therefore, our goal with integrated Organizational Change Management (OCM) is to ensure that organizational results and business outcomes are achieved by engaging employees, obtaining their buy-in and embracing the adoption of the new way of working. Baker Tilly has proven tools, methods and skills for assessing and managing your organizational readiness; and we have worked with multiple other organizations to integrate change management effectively into their broader program activities.



Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Change management experience

Change is all around us. Organizational transformation initiatives are only as successful as the rate at which people and organizations adopt and embrace the change. Successful change occurs when comprehensive planning and appropriate capabilities exist to clearly communicate the changes and train individuals within the organization.

When it comes to business transformation initiatives, we take change management seriously. Baker Tilly's change management professionals help successfully integrate change initiatives, sustain them and analyze the impacts. Our approach allows you to connect people, process and digital technology across your program.

Creating a plan

Our change management specialists understand the complexity of business transformation projects and can help you develop a comprehensive change management plan that is crucial to success.

CONNECT	BEST PRACTICES	RAPID CHANGE
We connect project teams more tightly to the strategic executive agenda and focus on reducing program risk that could result from low adoption and transition barriers.	Our holistic approach focuses on helping your people adapt to new processes and technologies to achieve results.	Your organization will be able to adapt more quickly to change and reduce time lost due to change complexities.

While many consulting companies approach organizational change management with a standard toolkit and a one-size-fits-all approach, Baker Tilly recognizes the fact that organizations' unique characteristics and capabilities will demand a custom-tailored approach to maximize their ability to succeed.

We pair a small team approach with global resources, as well as change management experts who will collaborate with your internal change management team. Given that change is a reality for you now and tomorrow, our role is both to help you with the issues you face today and help build a capability to better deal with the challenges you will face in the future.

We can work with you to identify change levers in your organization and partner with you to create change management plans that are tailored to the unique needs of your people and culture.

Your custom change management plan can include:

- Project brand development
- Stakeholder assessments and analysis
- Communication vehicle assessment
- Change readiness assessment
- Change risk analysis
- Job impact assessment
- Communication and engagement planning
- Training plan development

Documenting our change management strategy

Our change management methodology is rooted in our eight-lever model that defines critical components of change enablement within an engagement, which fosters project success from inception through sustainment. Given that each engagement encompasses some form of organization change – whether it

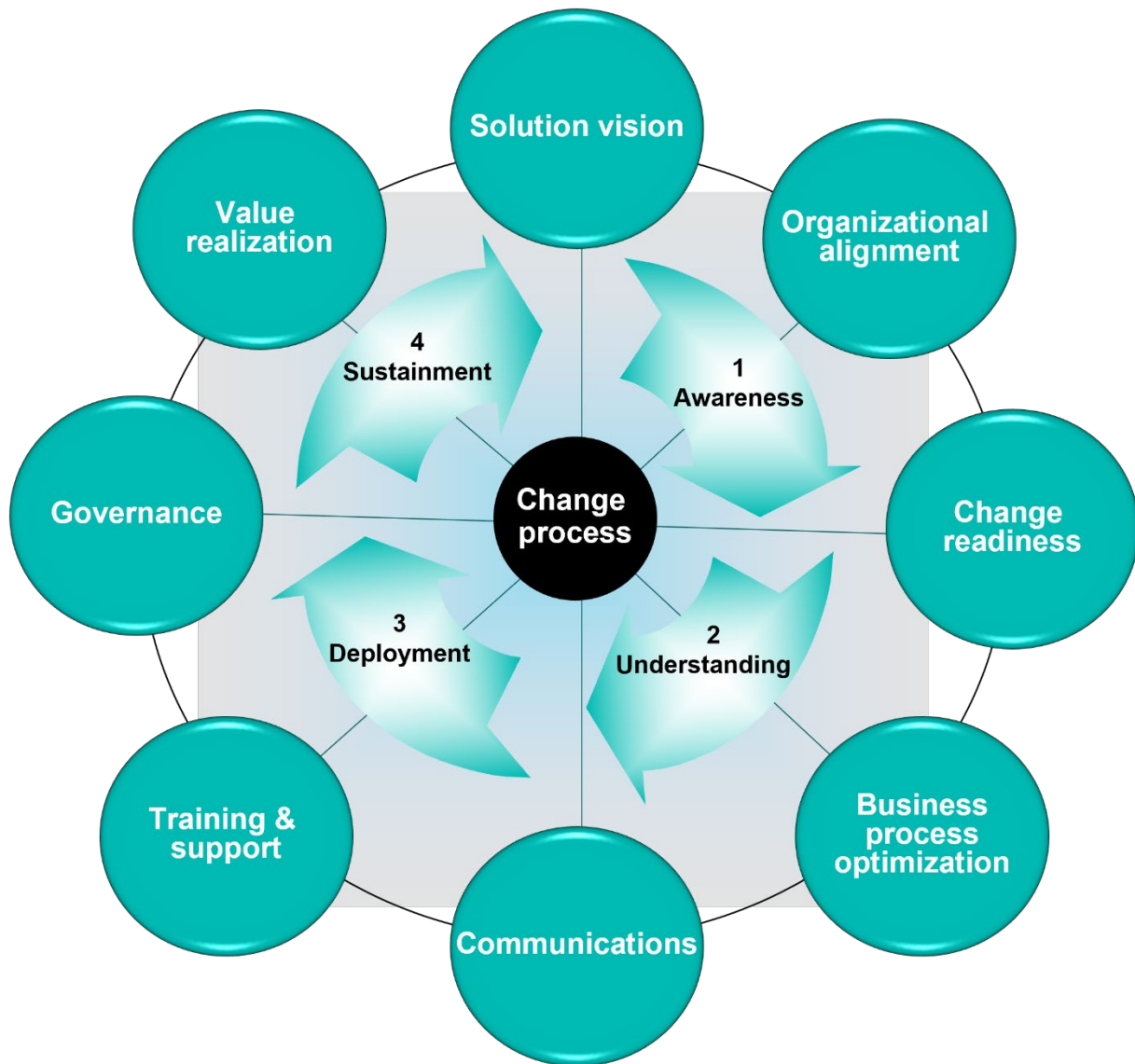
Supporting you

Our change management consultants support organizations across multiple industries (including technology) by aligning our approach to the unique circumstances of both the industry and the change event.

Additional Statement on Qualifications In Support of the RFP Qualification Checklist

be business process, technology or behavior – it is important that the project team resources understand each change lever so subsequent activities and actions can align accordingly.

The diagram below shows an overview of our eight-lever change management model.

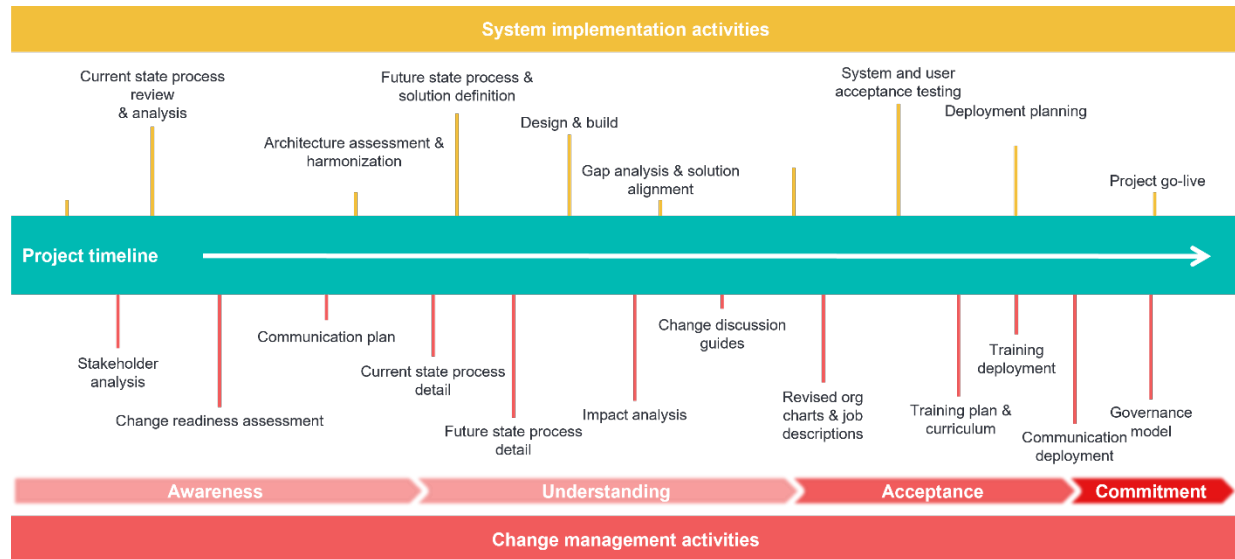


Additional Statement on Qualifications In Support of the RFP Qualification Checklist

Change management processes

We embed the change management workstream alongside the functional workstreams throughout the implementation to ensure the right activities are happening at the right time with the right audience. The graphic below outlines the high-level functional implementation milestones and the change management activities that we execute alongside the milestones.

This embedded and tightly aligned approach allows your employees to begin experiencing the change at a consumable pace throughout the implementation so they are well-prepared and not surprised for their new roles and processes by the time we hit go-live.



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The success of Indiana's Statewide Voter Registration System is in large part based on the State's project management team from Baker Tilly. Dedicated team members have played value added roles throughout the three year process including critical roles in ensuring a successful design, development, testing and county implementation effort. Our success has led to Indiana being documented in National Accounts as a model for election reform.

Indiana Secretary of State