



PROPOSAL

## City of Superior

Enterprise Resource Planning Software  
Selection Advisory Services

RFP # 24-20-FIN

**BerryDunn**

2211 Congress Street  
Portland, ME 04102-1955  
207-541-2200

**Ryan Doil, Project Principal**  
rdoil@berrydunn.com

**Corey Clafin, Project Manager**  
cclafin@berrydunn.com

**Proposal Due Date:**  
April 16, 2024 before 3 p.m. CDT

April 16, 2024

City of Superior  
Attention: Jane Darwin, Contract Analyst  
1316 North 14<sup>th</sup> Street, 2<sup>nd</sup> floor  
Superior, WI 54880

Dear Jane Darwin:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), I am pleased to submit this proposal in response to the City of Superior's (the City's) Request for Proposals (RFP) #24-20-FIN for Enterprise Resource Planning (ERP) Software Selection Advisory Services. We have read the City's request and reviewed its terms and conditions and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 90 calendar days from the proposal deadline of April 16, 2024.

BerryDunn is a nationally recognized independent management and IT firm, headquartered in Portland, Maine, with eight office locations nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 50-year history. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states—including numerous clients in the State of Wisconsin (the State)—Puerto Rico, and Canada.

Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. The human aspect of projects can often be forgotten in the maze of regulatory changes and legal requirements with which public-sector organizations must comply. BerryDunn proudly tailors each of its projects to recognize the work our clients do every day. We care about what we do, and we care about the people impacted by our work—including those at the City.

As evident in the key points that follow, we have a strong desire to partner with the City on this initiative; a clear understanding of the work effort required and the City's needs; extensive experience conducting similar projects in the State and nationally; and several notable attributes that differentiate us from other proposers.



**Our project team members work exclusively with local government clients.**

BerryDunn's Local Government Practice Group is dedicated to serving public-sector clients and 75% of our team members are former public-sector employees. Notably, our proposed principal, Ryan Doil, has been involved with approximately 24 assessment and replacement projects involving CentralSquare products including HTE/Naviline. We will apply our insights, lessons learned, and knowledge of best practices to help the City streamline its business processes, standardize its data collection and reporting, make sound decisions, and improve its operational effectiveness.



**Our deep expertise in providing ERP consulting services and notable background with CentralSquare.**

With BerryDunn, the City will be served by a firm with extensive experience assisting clients in every stage of the enterprise system planning, selection, and implementation life cycle. In fact, we have conducted more than 200 comparable engagements for a variety of public-sector clients, and three dozen included assessment and selection of a new system to replace a legacy CentralSquare product. As a result of this and our independence from the vendor marketplace, we have become familiar with all major ERP vendors and the functionalities their systems provide.



**Our qualifications and availability to deliver the requested services efficiently and effectively.**

We have been providing professional consulting services for more than 30 years and use proven methodologies and tools to perform our work. As a result of this experience, we are skilled at developing realistic timelines that take the client’s specific needs and common scheduling challenges into account. Once we have a signed contract, our project manager, Corey Claflin, will manage the project according to the agreed-upon work plan, schedule, and budget. We have an excellent track record of meeting deadlines, and as is standard practice, we only allow changes to the timeline, scope, or project fees based on changes documented and approved by the client.

Our clients like partnering with us and find our people make the difference. We value building long-lasting relationships with our clients. While we have a deep pool of resources available to support the City’s project—including more than 335 in our Consulting Services Team—the team proposed are the people you will work with day-to-day in project activities, each of whom have chosen this work as their career. We understand that organizations such as the City require a certain level of care and attention to detail to help ensure project success, and we will align our approach to meet City staff where they are and deliver exceptional services to match their caliber.



**Our independent and objective advisory services.**

BerryDunn is pleased to state that we do not have any preferred vendors, nor are we partners, affiliates, or sponsors of any software. As an independent and software-agnostic firm, we provide truly independent advisory and system analysis services to our clients. This means that we will only work in the City’s best interests at all times. Additionally, through our BerryDunn Bridge program, we conduct outreach to the vendor community to stay abreast of industry trends, connect with vendors, and bring valuable insights to our clients.

As a principal in BerryDunn’s Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources.

---

*If you have any questions regarding our proposal or updates during the evaluation process, please consider me your primary point of contact and feel free to contact me directly.*

---

Sincerely,

A handwritten signature in black ink, appearing to read 'Ryan Doil', with a horizontal line underneath.

**Ryan Doil, MBA, CPPB, NIGP-CPP, Prosci® CCP, Principal**  
2211 Congress Street, Portland, ME 04102-1955  
t: 207-541-2343 | e: rdoil@berrydunn.com

# Table of Contents



<b>Table of Contents .....</b>	<b>i</b>
<b>4.1 Firm Overview .....</b>	<b>2</b>
<b>4.2 Key Personnel .....</b>	<b>4</b>
<b>4.3 Relevant Experience .....</b>	<b>9</b>
<b>4.4 Approach and Work Plan.....</b>	<b>21</b>
<b>4.5 Cost.....</b>	<b>39</b>
<b>4.6 Subcontractors.....</b>	<b>41</b>
<b>4.7 Statement of Qualifications Reference.....</b>	<b>42</b>
<b>4.8 Qualification Evaluation Checklist.....</b>	<b>43</b>
<b>4.9 Statement of Investigation.....</b>	<b>47</b>
<b>Appendix A: Forms.....</b>	<b>48</b>
<b>Appendix B: Resumes.....</b>	<b>51</b>

## 4.1 Firm Overview

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 65 principals, 34 owners, and eight office locations, **we have experienced sustained growth throughout our 50-year history.**

We employ more than 875 staff members—including more than 335 in our consulting group. Our team members bring valuable perspective from their **extensive project experience for more than 650 state, local, and quasi-governmental agencies**, as well as their prior experience serving state and local government agencies. This experience provides them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to your internal divisions and the constituents you serve.

Our firm provides a full range of professional services including:

- **Software Planning and Procurement**
- **Software Implementation Project Management and Oversight**
- **Business Process Improvement, Reviews, and Redesign**
- Organizational Change Management (OCM)
- Organizational, Operational, and Staffing Analyses
- Performance Analyses
- Enterprise and Departmental Strategic Planning
- Leadership and Organization Development
- Master Planning
- Cost of Service and Fee Studies
- Project Assessments and Remediation
- IT Assessments
- IT Strategic Planning

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.

*Figure 1: Local Government Practice Group Specialization*



### Our Highly Specialized Enterprise Digital Transformation Practice

Of note to the City, we have a dedicated **Enterprise Digital Transformation (EDT) Practice** that focuses on providing advisory services that address clients' technological and business process modernization needs. The EDT Practice offers more than 30 years of relevant consulting experience, as well as firsthand insights gained from team members' prior experience serving within local government organizations. Having conducted more than 200 projects that span the system replacement life cycle or include business process improvement as a core focal point or part of a larger initiative, we bring unique insights and industry best practices to every engagement. We understand the functionality of local government organizations, and we understand the processes, policies, people, and technology that support it. It is through this and our independence and objectivity that we serve as trusted advisors to our clients and strong proponents to the projects they conduct.

## BerryDunn Bridge and Our Independence



BerryDunn Bridge is a program facilitated by our Local Government Practice Group. This program was developed to promote information sharing between public-sector software providers and our consultants and helps continually expand our own—and our clients’—understanding of the public-sector software landscape. BerryDunn Bridge provides opportunities to share our clients’ needs with the software vendor community and gain knowledge of upcoming technological trends, recent product developments, and find target markets for software providers.

Public-sector software providers opt into this program to establish a cadence of meetings between their team members and our own to keep up to date on industry and client trends. This includes knowledge-sharing opportunities ranging from focused discussions between management teams to software demonstrations with a broader audience of consulting staff. As a result of this program, we can best serve our clients and pass on our knowledge gained—including modern software system capabilities not currently being utilized or perhaps even previously contemplated by our clients.

BerryDunn is not affiliated with any specific vendor, allowing us to provide truly independent advisory services to our clients. In that respect, we recognize the importance of networking and continuous market research to help ensure we are apprised of industry best practices, emerging trends, and updates in the software vendor community.

## 4.2 Key Personnel

### Organizational Structure

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City's requested work effort.** Figure 2 describes the organizational structure of our project team, followed by a listing of project staff. It should be noted we do not intend to subcontract any portion of the City's desired scope of work.

Figure 2: Organizational Structure



### Roles, Responsibilities, and Qualifications

Below and on the following pages, we list our project team members' experience, qualifications, and expertise as it relates to projects of this nature and work with comparable public-sector clients. Our project team members' full resumes can be found in **Appendix B**.



#### Ryan Doil, MBA, Prosci® CCP, CPPB, NIGP-CPP | Project Principal

Ryan is a principal in the Local Government Practice Group who focuses on finance and administration-related projects, including procurement and vendor support activities. Ryan brings more than five years of experience in a federal procurement role, and has managed projects similar in scope and size to the services requested by the City for a number of BerryDunn clients, including the City of Boca Raton, Florida; Outagamie County, Wisconsin; and the City and County Information

Technology Commission, Wisconsin. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects, such as the one planned by the City. He has led and assisted in the assessment of current environments and defined future system requirements through a collaborative and structured system evaluation process, working with over 100 local governments on software assessment and replacement projects of similar scope. He also has been involved in developing improvement recommendations as they relate to the procurement process.

As the **project principal**, Ryan will have overall responsibility for the services we have proposed to the City. He will help ensure commitment of our firm and appropriate resource allocation and will review and approve all deliverables in accordance with BerryDunn's quality assurance processes.



**Corey Clafin, COBIT®, CAPM® | Project Manager**

Corey is a senior consultant in BerryDunn's Local Government Practice Group. He is an expert in project management and specializes in supporting city- and county-level departments through system selection and implementation projects, process improvement, and strategic planning efforts. He has supported similar clients in the City of Danville, Virginia; City of Lakeville, Minnesota; City of Pasadena, California; Louisville/Jefferson County, Kentucky; Clark County Public Health, Washington; and Outagamie County, Wisconsin, among others. Corey has extensive knowledge of ERP contract negotiation, a strong understanding of governmental accounting standards, and familiarity with the State's laws and practices. Notably, he was involved in software and implementation contract negotiations with Outagamie County, Wisconsin, as well as the Mobile County Health Department, Alabama, where he assisted in negotiating the Department's ERP contract.

As the **project manager**, Corey will be responsible for maintaining a constructive and clear line of communication between the City's staff and BerryDunn, monitoring the progress of the project, tracking the initiation and completion of tasks and milestones, facilitating meetings and information-gathering activities, and leading the development of project deliverables.



**Allisha Ouellette, MBA | Lead Business Analyst**

Allisha is a consultant with BerryDunn's Local Government Practice Group. Allisha has eight years of project management and coordination experience and brings strong communication, leadership, critical thinking, and analytical skills to her clients. Allisha develops deliverables, conducts monthly aggregate reporting, and provides project management support for state and local government clients of various sizes and scopes, including governmental clients such as the City of Auburn, Washington; Madison Metropolitan Sewer District, Wisconsin; Denton County Transportation Authority, Texas; and Jefferson County School District, Colorado. Allisha has also provided project management services for clients such as Syracuse City School District, New York; Coachella Valley Association of Governments (CVAG), California; and Washington County, Oregon.

As the **lead business analyst**, Allisha will lead the project team with facilitating meetings, preparing status reports, and developing project deliverables in a timely manner.



**Jonathan Sullivan, MBA, MA, MURP | Business Analyst**

Jonathan is a consultant in our Local Government Practice Group. He brings a strong background in public service and urban planning, zoning, interested party relations, and digital integration experience. Jonathan is skilled at documenting project outcomes, communicating, and researching to support consulting projects. Jonathan has led research and analysis efforts for initiatives with Fauquier County, Virginia; Hartford County, Maryland; and Yamhill County, Oregon. Further, he has contributed to best practice research, project outcomes documentation, and project meeting logistics coordination.





**Ross DeFalle, MBA | Business Analyst**

Ross is a senior consultant in our Local Government Practice Group. He has more than three years of IT project management and systems implementation leadership and over seven years in client relationship building and account management. Ross is an experienced change agent for enterprise systems and leading concurrent projects following best practices, tracking scope, milestones, and deliverables. His experience includes providing strategic leadership for complex IT strategic plans, cultivating client relationships, and consistently achieving functionality goals. Ross has provided business process improvement services to many BerryDunn clients during enterprise system selection. His experience includes fact-finding, recommendations development, and requirements definition. He draws on experience and industry best practices when assisting clients with business process recommendations.

As the **business analysts**, Jonathan and Ross will provide general business analysis support to the project team as it relates to facilitating meetings, preparing status reports, and developing project deliverables in a timely manner. They will also help assess the City's current environment, develop requirements, and form recommendations across functional areas.



**Erin Provazek, MBA, CGCIO, ITIL, Prosci® CCP, PMP®, COBIT 2019 | Technical Lead**

Erin is a senior manager in BerryDunn's Local Government Practice Group. She co-leads our Technology Management Practice, which specializes in assisting local governments as they develop IT assessments and strategic plans. She is committed to helping these clients plan for their futures and align IT functions with organizational goals. Erin brings over 23 years of experience performing and managing all levels of IT operations and projects for local governments. Her operational experience includes IT service management design and operation; building technology focused strategic business partnerships with organization business units; extensive project management; data management; and cost planning and budgeting. As a former IT director for a local government organization where she used CentralSquare HTE and migrated to a new ERP system, Erin will be able to leverage her specialized knowledge where it benefits the City most.

As the **technical lead**, Erin will support the project team with facilitating meetings, preparing status reports, and developing project deliverables in a timely manner. She will also take part in assessing the City's current environment and developing recommendations for its future state as it relates to any technical considerations the City might encounter, including potential integrations, requirements, and interfaces.



**Kate Offerdahl-Joyce, NIGP-CPP | Procurement Lead**

Kate is a senior consultant in our Local Government Practice Group who focuses on procurement and contract analysis—having led more than 30 municipal clients through comparable ERP system selection projects. They bring more than 11 years of procurement, process improvement, and recommendation implementation experience. With a strong background in project management, Kate has hands-on experience working with a wide array of teams and organizations to improve business processes to be more efficient, user-friendly, and time and cost-effective. Kate is also a National Institute of Governmental Purchasing Certified Procurement Professional.

As the **procurement lead**, Kate will oversee the RFP process with the City and provide perspective on procurement processes and compliance best practices.

### Workload and Availability

**We are proposing on the City's initiative because we have the qualifications, experience, and availability necessary to perform the requested work effort successfully.**

We have been providing professional consulting services for more than 30 years and use proven methodologies and tools to perform our work. As a result of this experience, we are skilled at developing realistic timelines that take the client’s specific needs and common scheduling challenges into account. For example, when a project entails meeting with several agency stakeholders, we build time in the schedule for follow-up meetings, because we know that stakeholders’ schedules can change on short notice, often due to circumstances beyond their control.

Once we have a signed contract, our project manager manages the project according to the agreed-upon work plan, schedule, and budget. We have an excellent track record of meeting deadlines and, as a standard practice, we only allow changes to the timeline, scope, or project fees based on changes that are documented and approved by the client.

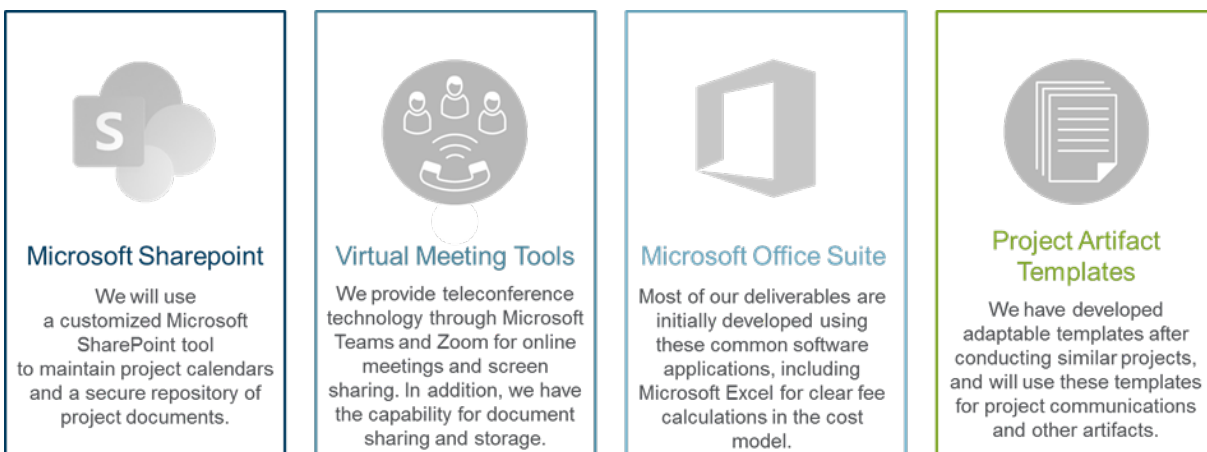
Some BerryDunn staff members work exclusively on one engagement, while others work on multiple engagements concurrently. On average, staff members work on four to six projects at any given time.

### Communication Approach

Clear and well-timed communication is vital to the success of any project. Our intent is to involve the City personnel as needed, make roles and responsibilities clear, and minimize impact to daily jobs. As part of project planning, we will identify the communication and awareness needs of each project stakeholder and the method and frequency of communication to meet those needs.

For the daily management and undertaking of project tasks, we strive to avoid unnecessary delays, enhance productivity, promote collaboration, and minimize barriers to participation. To that end, we utilize technology that is familiar or intuitive to most users in addition to our project resources assembled from years of public-sector consulting, as detailed in Figure 3.

Figure 3: Technology Toolkit



### Our Bench Strength

BerryDunn carefully considers the tasks, timelines, and objectives for proposed projects in order to select team members who are best qualified to provide services. Our staffing strategy offers the City highly qualified experts with significant depth of experience leading IT assessments of similar size and complexity. BerryDunn staff have a wide variety of relevant assessment, compliance, financial, and consulting experience with all varieties of local, regional, state, and quasi-governmental agencies. Our key team members have direct, hands-on consulting experience, which decreases lead times and increases efficiencies. We believe that developing a collegial relationship fosters a shared commitment to project success.

We regularly conduct work for clients throughout the United States. We have been able to effectively bridge distance gaps by planning an appropriate amount of on-site work for the needs of the client and project and using teleconferencing and web-based project management tools. Additionally, all of our consultants are provided with the necessary technology to enable them to work effectively, regardless of their location. When on-site, we will observe the City's normal business hours. Additionally, we can, upon request and mutual agreement, make ourselves available to our clients outside our normal business hours. We will respond to client emails and phone calls within a 24-hour time period.

The City will benefit from BerryDunn's deep bench strength, with 335 consultants to support your project needs. When we receive a request for services, we identify team members based on several factors, including (but not limited to):

- The nature of the work to be performed
- The level of commitment requested (e.g., full-time, part-time)
- The consultant's other commitments
- Specific certifications and/or areas of expertise
- The timing and duration of the project

You can be confident in our ability to manage and assign the right resources based on your unique needs. Our internal resource manager monitors staff allocations across all of our projects, tracks staff availability, and provides information to our management team to help identify qualified project resources. In addition, our management team members communicate regularly about staff workloads and commitments to help with effectively managing team members who are working on more than one project at any given time.

## 4.3 Relevant Experience

### Commitment to the Upper Midwest

BerryDunn has a demonstrated commitment to serving public-sector clients in the State and the upper Midwest. We have developed a strong understanding of the public-sector landscape in the region through recent or ongoing consulting engagements with the following clients:

Wisconsin	Minnesota	Illinois
Calumet County	Carver County	Champaign County
City of Wausau	City of Bloomington	Chicago Metropolitan Agency for Planning
City of Waukesha	City of Chaska	City of Peoria
North Central Health Care	City of Duluth	City of St. Charles
Outagamie County	City of Edina	City of Urbana
University of Wisconsin System	City of Lakeville	Columbia College Chicago
Waukesha County	City of Monticello	DuPage County
Waukesha County Auditor's Office	City of Prior Lake	Elmhurst Park District
Wisconsin Office of the Commissioner of Insurance	City of St. Paul	Illinois Park and Recreation Association
WPS Health Solutions	City of Stillwater	Lake County
	City of Woodbury	McLean County
<b>Iowa</b>	Dakota County	Northbrook Park District
City of Bettendorf	Minnesota Department of Corrections	Peoria County
City of Cedar Falls	Minnesota Department of Employment and Economic Development	St. Charles Park District
City of Iowa City	Minnesota Department of Health	St. Clair County
Iowa Department of Human Services	Minnesota Department of Health Services	Village of Downers Grove
Scott County	Minnesota Department of Labor and Industry	Village of Lincolnwood
Scott County-Waste Commission	Minnesota Department of Public Safety	Village of Oak Park
	Minnesota Department of Public Safety, Bureau of Criminal Apprehension	Village of Schaumburg
<b>Michigan</b>	Minnesota Health Benefits Exchange	Western DuPage Special Recreation Association
City of Ann Arbor	Minnesota IT Services	Western Illinois University
City of Detroit	Minnesota Management, Analysis, and Development	Wheeling Park District
City of Mt. Pleasant	Scott County	Wilmette Park District
City of Saline	Stearns County	
Marquette County	Three Rivers Park District	
Michigan Department of Education	University of Minnesota	
Michigan Department of Health and Human Services	University of Minnesota Foundation	
Oakland University	Washington County	
Ottawa County		
Saginaw County		
Schoolcraft Memorial Hospital		
Township of Canton		
Washtenaw County		
Wayne State University		



## Notable Background with CentralSquare Naviline/HTE

BerryDunn has worked with dozens of clients during the planning and implementation phases of replacing their CentralSquare systems and while considering CentralSquare product offerings. Table 1, below and on the following pages, outlines our experience with CentralSquare.

Table 1: CentralSquare Experience

CentralSquare Experience	
City of Allen, Texas (85,000)	ERP (CentralSquare HTE)
City of Aventura, Florida (40,042)	ERP (CentralSquare Naviline)
City of Bettendorf, Iowa (39,000)	ERP (CentralSquare Naviline)
City of Bloomington, Minnesota (86,000)	ERP (CentralSquare HTE), Community Development (Non-Integrated Systems)
City of Boca Raton, Florida (91,000)	ERP (CentralSquare HTE/Naviline and Infor Infinium), Community Development (CentralSquare HTE), and Utility Billing (CentralSquare HTE)
City of Broken Arrow, Oklahoma (112,000)	ERP; Community Development; Utility Billing; CAD-RMS; Municipal Court; Jail Management; Law Enforcement Records Management (CentralSquare HTE, ExecuTime)
City of Cedar Falls, IA (41,000)	System Replacement (CentralSquare Naviline)
City of College Station, Texas (95,000)	ERP (CentralSquare HTE), Community Development (CentralSquare HTE), and Utility Billing (CentralSquare HTE)
City of Coral Springs, Florida (128,000)	Community Development (CentralSquare HTE) and Utility Billing (CentralSquare HTE)
City of Danville, Virginia (41,000)	ERP Consultant (CentralSquare OneSolution)
City of Dover, Delaware (37,453)	ERP, Community Development, and Utility Billing (CentralSquare HTE)
City of Farmers Branch, Texas (35,000)	ERP (CentralSquare HTE), Community Development (MyGov), and Utility Billing (CentralSquare HTE)
City of Grand Prairie, Texas (193,837)	Community Development (CentralSquare HTE)
City of Grants Pass, Oregon (35,000)	Utility Billing (CentralSquare HTE)
City of Helena, Montana (32,000)	ERP Software Evaluation, Recommendation, and Project Oversight (CentralSquare Naviline)

City of Homestead, Florida (65,000)	Community Development ( <i>CentralSquare HTE</i> )
City of Irvine, CA (273,000)	ERP ( <i>CentralSquare OneSolution</i> )
City of Jacksonville, NC (72,723)	Business Software Needs Assessment – ERP, Community Development, Utility Billing ( <i>CentralSquare Naviline</i> )
City of Manassas, Virginia (37,000)	ERP ( <i>CentralSquare HTE</i> ), Community Development ( <i>CentralSquare HTE</i> ), and Utility Billing ( <i>Daffron CIS</i> )
City of McKinney, Texas (181,000)	ERP ( <i>CentralSquare HTE</i> ), Asset Management and Work Orders ( <i>NuMix</i> ), and Utility Billing ( <i>CentralSquare HTE</i> )
City of Mesquite, Texas (134,000)	ERP ( <i>Performance</i> ), Community Development ( <i>Non-Integrated Systems</i> ), Utility Billing ( <i>CentralSquare</i> ), and Municipal Courts ( <i>Non-Integrated Customized Systems</i> )
City of Novato, California (52,000)	ERP ( <i>CentralSquare HTE</i> )
City of Ormond Beach, Florida (42,000)	ERP ( <i>CentralSquare HTE</i> ), Community Development ( <i>CentralSquare HTE</i> ), and Utility Billing ( <i>CentralSquare HTE</i> )
City of Pearland, Texas (96,000)	ERP ( <i>CentralSquare HTE</i> ), Community Development ( <i>CentralSquare HTE</i> ), and Utility Billing ( <i>CentralSquare HTE</i> )
City of Santa Fe, New Mexico (70,000)	ERP ( <i>Oracle JD Edwards EnterpriseOne and CentralSquare HTE</i> ), Community Development ( <i>CentralSquare HTE</i> ), and Utility Billing ( <i>JD Edwards CIS</i> )
City of Sioux Falls, South Dakota (158,000)	ERP ( <i>CentralSquare HTE</i> ) and Asset Management ( <i>Infor Hansen</i> )
City of Sugar Land, Texas (89,000)	ERP ( <i>CentralSquare HTE and Tyler Incode</i> )
City of Waynesboro, Virginia (21,000)	ERP ( <i>CentralSquare HTE</i> ), Community Development ( <i>CentralSquare HTE</i> ), Utility Billing ( <i>CentralSquare HTE</i> ), and Tax Billing ( <i>CentralSquare HTE</i> )
City of West Jordan, Utah (116,541)	ERP/Community Development System Selection ( <i>CentralSquare Pentamation</i> )
City of Wilmington, North Carolina (117,000)	ERP, Community Development, and Asset Management ( <i>CentralSquare HTE</i> )
Coconino County, Arizona (140,000)	ERP ( <i>CentralSquare HTE</i> ) and Community Development Licensing ( <i>Dude Solutions</i> )
County of Kauai, Hawaii (78,000)	Human Resource Management System ( <i>CentralSquare HTE</i> )

Minnehaha County, South Dakota (183,000)	ERP and Tax (CentralSquare HTE and Non-Integrated Custom Systems)
Town of Herndon, Virginia (22,000)	ERP (CentralSquare HTE)

## Systems Consulting

BerryDunn has extensive experience in providing a variety of system consulting services to clients of similar size and complexity to the City. In Table 2, below and on the following pages, we have included a summary of public-sector system consulting projects with which our firm has assisted in the last five years. We have also provided population data in order to offer additional context regarding our experience. **Due to the breadth of our experience, we did not include contact information for each client listed below. However, in the following section, we highlight several projects that demonstrate our thorough experience with systems consulting.**

Table 2: Systems Consulting Experience

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
<b>Counties and Regional Governments</b>							
Adams County, Colorado (519,570)	•	•	•	•	•	•	•
Berks County, Pennsylvania (415,000)	•	•	•	•	•	•	
Calumet County, Wisconsin (53,000)	•	•	•				
Carver County, Minnesota (102,100)						•	•
Chesterfield County, Virginia (353,000)	•	•	•	•	•	•	
Clark County, Washington (488,000)	•	•	•	•	•	•	•
Coconino County, Arizona (140,000)						•	•
Doña Ana County, New Mexico (218,000)	•	•	•	•	•	•	
Ellis County, Texas (185,000)	•	•	•	•	•	•	•
Goochland County, Virginia (23,000)	•	•	•	•	•	•	•
Hamilton County, Indiana (338,000)	•	•	•	•	•	•	•
Henrico County, Virginia (325,000)	•	•	•	•	•		
Kaua'i County, Hawai'i (72,000)	•	•	•	•	•		
Maui County, Hawai'i (167,000)	•	•	•	•	•	•	

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Lafayette Consolidated Government, Louisiana (242,000)	•	•	•	•	•	•	•
Louisville/Jefferson County Metro, Kentucky (740,000)	•	•	•	•	•	•	•
Minnehaha County, South Dakota (183,000)	•	•	•	•	•	•	•
Mobile County Health Dept, Alabama (415,000)	•	•	•	•	•	•	•
Monroe County, Florida (74,000)	•	•	•	•	•	•	•
Montgomery County, Pennsylvania (831,000)	•	•	•	•	•	•	•
Outagamie County, Wisconsin (184,000)	•	•	•	•	•	•	•
Peoria County, Illinois (179,000)	•	•	•	•	•	•	•
Person County, North Carolina (39,000)							•
Saginaw County, Michigan (191,000)	•	•	•	•	•	•	•
Scott County, Iowa (166,000)	•	•	•	•	•	•	•
Sussex County, Delaware (200,000)	•	•	•	•	•	•	•
Washington County, Minnesota (252,000)	•	•	•	•	•	•	•
Waukesha County, Wisconsin (407,000)	•	•	•	•	•	•	
Yamhill County, Oregon (107,000)	•	•	•	•	•	•	•
<b>Municipalities</b>							
City of Alameda, California (79,000)							•
City of Amarillo, Texas (199,000)	•	•	•	•	•	•	•
City of Arlington, Texas (270,000)	•	•	•	•	•		
City of Aurora, Colorado (369,000)	•	•	•	•	•	•	•
City of Aventura, Florida (110,763)	•	•	•	•	•	•	
City of Avondale, Arizona (85,000)	•	•	•	•	•	•	•
City of Beaverton, Oregon (97,000)	•	•	•	•	•	•	•



	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
City of Bettendorf, Iowa (39,102)	•	•	•	•	•	•	•
City of Boca Raton, Florida (91,000)	•	•	•	•	•	•	•
City of Boulder, Colorado (105,000)							•
City of Brighton, Colorado (40,000)	•						
City of Broken Arrow, Oklahoma (112,000)	•	•	•	•	•	•	•
City of Burlington, Vermont (43,000)							•
City of Cedar Falls, Iowa (41,000)	•	•	•	•	•	•	
City of Coral Springs, Florida (128,000)	•	•	•	•	•	•	•
City of Danville, Virginia (41,000)	•	•	•	•	•	•	
City of Denton, Texas (140,000)	•	•	•	•	•	•	•
City of DeSoto, Texas (53,000)	•	•	•	•	•	•	
City of Detroit, Michigan (675,000)	•	•	•	•	•	•	•
City of Dover, Delaware (37,453)	•	•	•	•	•	•	•
City of Duncanville, Texas (40,000)							•
City of Edina, Minnesota (52,000)	•	•	•	•	•	•	•
City of Fargo, North Dakota (122,000)	•	•	•	•	•	•	
City of Farmers Branch, Texas (35,000)	•	•	•	•	•	•	•
City of Fort Collins, Colorado (165,000)	•	•					
City of Fountain Valley, California (56,000)	•	•	•	•	•	•	•
City of Frisco, Texas (177,000)	•	•	•	•	•	•	•
City of Gahanna, Ohio (35,000)	•	•	•	•	•	•	•
City of Gaithersburg, Maryland (68,000)	•						
City of Garland, Texas (238,000)	•						
City of Glendale, Arizona (237,000)	•	•	•	•	•	•	•
City of Grand Prairie, Texas (193,837)							•

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
City of Helena, Montana (32,000)	•	•	•	•	•	•	•
City of Independence, Missouri (117,000)	•	•	•	•	•	•	•
City of Irvine, California (273,000)	•	•	•	•	•	•	•
City of Irving, Texas (230,000)	•	•	•	•	•	•	•
City of Jacksonville, North Carolina (72,723)	•	•	•	•	•	•	
City of La Mesa, California (60,000)	•						
City of Lakeville, Minnesota (64,000)	•	•	•	•	•	•	•
City of Lawrence, Kansas (96,000)	•	•	•	•	•	•	•
City of Livermore, California (90,000)	•	•	•	•	•	•	
City of Long Beach, California (470,000)							•
City of Mansfield, Texas (70,000)	•	•	•	•	•	•	
City of McKinney, Texas (181,000)	•	•	•	•	•	•	•
City of Midland, Texas (119,000)	•	•	•	•	•	•	•
City of Minot, North Dakota (48,000)						•	•
City of Ormond Beach, Florida (42,000)							•
City of Pasadena, California (138,000)	•	•	•	•	•	•	
City of Philadelphia, Pennsylvania (1,581,000)	•	•					
City of Plano, Texas (287,000)	•	•	•	•	•	•	•
City of Puyallup, Washington (41,000)						•	•
City of Redding, California (92,000)	•	•	•	•	•	•	•
City of Richland, Washington (53,000)	•	•	•	•	•	•	•
City of San Leandro, California (90,000)	•	•	•	•	•	•	
City of Simi Valley, California (126,000)							•
City Spokane Valley, Washington (98,000)	•	•	•	•	•	•	•
City of St. Charles, Missouri (70,000)	•	•	•	•	•	•	

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFQ Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
City of Sugar Land, Texas (89,000)			•	•	•	•	•
City of Surprise, Arizona (121,000)	•	•	•	•	•	•	•
City of Tampa, Florida (388,000)	•	•	•	•	•	•	•
City of Tucson, Arizona (525,000)	•	•	•	•	•	•	•
City of Weatherford, Texas (31,000)	•	•	•	•	•	•	•
City of Wheat Ridge, Colorado (31,000)	•	•	•	•	•	•	
City of Wilmington, North Carolina (117,000)	•	•	•	•	•	•	•
City of Worcester and Public School Department, MA (23,000 students)	•	•	•	•	•	•	•
Regional and Special Purpose							
Coachella Valley Association of Governments, California (represents 10 cities, one county, and four Native American tribes)	•	•	•	•	•	•	•
Chicago Metropolitan Agency for Planning, Illinois (CMAP) (2,710,000)	•	•	•	•	•	•	•
City-Council Information Technology Commission (CCITC), Wisconsin (serves Marathon County, the City of Wausau, three counties' healthcare, four police departments, and Marathon public library system)	•	•	•	•	•	•	
Lafayette Consolidated Government, Louisiana (242,000)	•	•	•	•	•	•	
Louisville/Jefferson County Metro, Kentucky (740,000)	•	•	•	•	•	•	•
Metropolitan Government of Nashville and Davidson County, Tennessee (684,000)	•	•	•				
Omaha-Council Bluffs Metropolitan Area Planning Agency, Nebraska (968,000)	•	•	•	•	•	•	

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Tri-County Health Department, Colorado (1,400,000)	•	•	•	•	•	•	•
Waste Commission of Scott County, Iowa (175,000)	•	•	•	•	•	•	
<b>K-12 Public Education</b>							
Jefferson County School District, Colorado (69,000 students)	•	•	•	•	•		
Laramie County School District One, Wyoming (14,000 students)	•	•	•	•	•	•	
Metro Nashville Davidson County Schools, Tennessee (86,000 students)	•	•	•	•			•
Newport School District, New Hampshire (1,000 students)	•						
Syracuse City School District, New York (20,000 students)				•	•	•	•

## Project Spotlights

Below, we detail several clients from Table 2 that can speak to the quality and satisfaction of our work. We are happy to provide additional information on any of the projects listed in the table above at the City's request.



### City of Jacksonville, NC (640 FTE)

*Business Software Needs Assessment (03/2022 – Present)*

**Contact:** Terrance Braxton, IT Director, 910-938-5057 |

[tbraxton@jacksonvillenc.gov](mailto:tbraxton@jacksonvillenc.gov)

**ERP Software System Selected:** SAP/Univerus

**Project Description:** The City of Jacksonville contracted with BerryDunn to assist in a Business Software Needs Assessment. The City was seeking a consultant to select and implement a single IT system in order for employees to make decisions by viewing enterprise-wide information on all business operations. Upon being selected, BerryDunn performed a Business Process Needs Assessment, RFP Development and Selection Assistance, and Implementation Project Management.



**City of Cedar Falls, IA (approx. 600 FTE)**  
*System Replacement (10/2021 – Present)*

**Contact:** Jennifer Rodenbeck, Director of finance and Business Operations, 319-273-8600 | [jennifer.rodenbeck@cedarfalls.com](mailto:jennifer.rodenbeck@cedarfalls.com)

**ERP Software System Selected:** CentralSquare Technologies

**Project Description:** In 2021, the City of Cedar Falls contracted BerryDunn to assist with system replacement of its CentralSquare Naviline legacy system. In 2023, the City extended their contract with BerryDunn in order to customize, refine, and

finalize our approach. BerryDunn reviewed the City’s current processes and assisted with RFP development. We helped the City with contract negotiation and submitted a statement of work for implementation. The City has also retained us for implementation.



**City of Helena, MT (approx. 315 FTE)**  
*ERP Software Evaluation, Recommendation, and Project Oversight (09/2021 – Present)*

**Contact:** Sheila Danielson, Finance Director, 406-447-8390 | [sdanielson@helenamt.gov](mailto:sdanielson@helenamt.gov)

**ERP Software Systems Being Implemented:** Tyler Enterprise ERP

**Project Description:** The City uses the Navilline system hosted by CentralSquare as a

legacy ERP solution. The financial software suite used for core functional areas—including general ledger, budgeting, capital asset and inventory management, accounts payable and receivable, payroll, personnel, utility billing, and purchasing—has not changed in more than two decades. The City hired BerryDunn to perform a needs assessment, develop an RFP, and assist with system selection to replace the Naviline product.



**City of Aventura, FL (190 FTE)**  
*ERP/IT Consulting Services (07/2022 – Present )*

**Contact:** Melissa Cruz, Finance Director, 305-466-8922 | [cruzm@cityofaventura.com](mailto:cruzm@cityofaventura.com)  
**Project Status:** Proposals received and under evaluation.

**Project Description:** The City of Aventura contracted BerryDunn to provide guidance as they sought a modernized ERP solution and moved away from their existing software, CentralSquare. BerryDunn is providing system assessment, procurement, and system

selection assistance to the City.



**City of Bettendorf, IA (320 FTE)**  
*ERP System Selection Project (07/2022 – Present)*

**Contact:** Jason Schadt, Finance Director, 563-344-4000 | [jschadt@bettendorf.org](mailto:jschadt@bettendorf.org)

**ERP Software Systems Implemented:** ADP. Inc – ADP Workforce Now

**Project Description:** In July of 2022, the City of Bettendorf contracted BerryDunn to assist with an ERP needs assessment and selection process. As such, BerryDunn proposed a two-phase approach to the City that included a System Planning phase and an RFP Development and Selection Assistance phase. After issuing an RFP, the City received responses from four vendors and ultimately chose Oracle Netsuite to provide them with an upgraded ERP solution. BerryDunn is currently performing project management services during the City’s implementation phase.



**City of Fargo, ND (1007 FTE)**  
*Financial Software System Upgrade (01/2021 – Present)*

**Contact:** Susan Thompson, Finance Director, 702-241-8158 |  
 sthompson@fargond.gov

**ERP Software System Selected:** Tyler Enterprise ERP

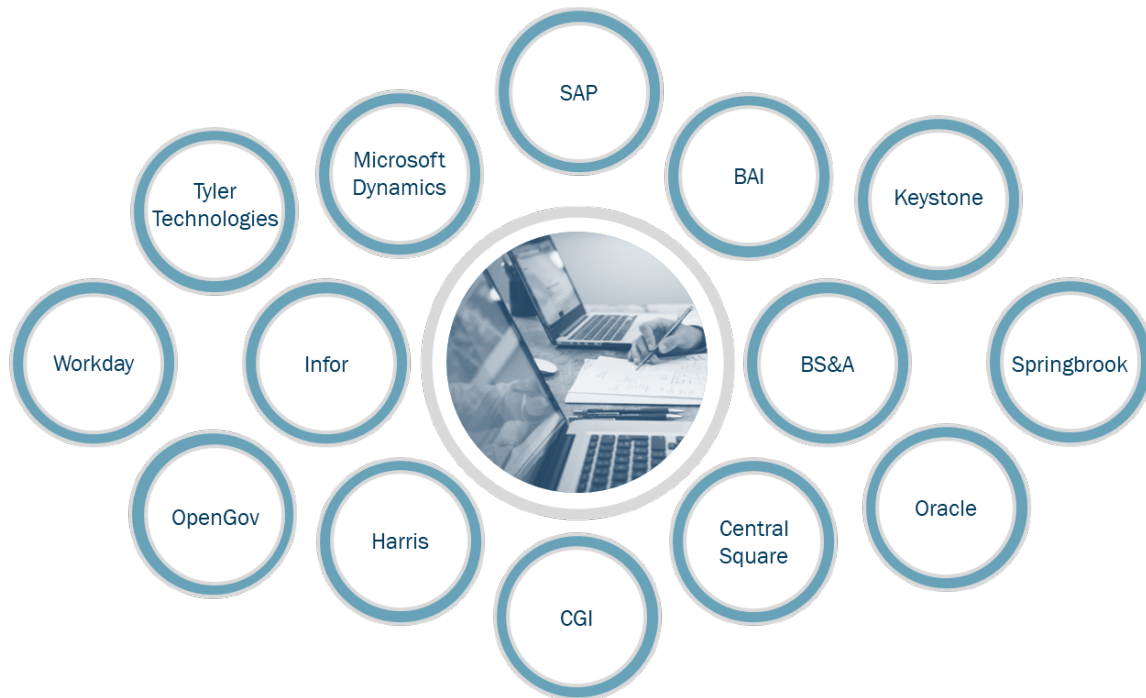
**Project Description:** The City hired BerryDunn to assist in the replacement of its CentralSquare ERP legacy system. BerryDunn performed a needs assessment, system planning, and assisted with system selection and contract negotiations.

### ERP Systems and Functional Area Familiarity

Figure 4, below and on the following page, describes our experience with ERP software vendors, including those that we have reviewed as part of systems planning engagements and those that clients selected for implementation. Our experience assessing a wide variety of vendors means that we understand the capabilities and limitations of today’s systems.

Our knowledge of today’s systems is not only broad in terms of the number of vendors we have evaluated; our team also has a significant depth of expertise in assessing the full suite of modules offered by these vendors. **The City will be pleased to notice that we have experience with all in-scope functional areas, thereby helping ensure a thorough and insightful process.**

*Figure 4: ERP System Vendor and Functional Area Experience*





### Financial Management

Accounting, Finance, General Ledger  
 Accounts Payable  
 Accounts Receivable  
 Budgeting  
 Check Reconciliation  
 Grant Management  
 Payroll  
 Procurement, Purchasing  
 Project Accounting  
 Treasury Management



### Human Capital Management

Applicant Tracking  
 Benefits  
 Certificates and Training  
 Employee Timecard  
 Human Resources  
 Learning Management  
 Payroll  
 Performance Management  
 Personnel  
 Recruiting  
 Time Entry, Scheduling



### Tax, Billing, Collections

Cash Receipts  
 Credit Card Functionality  
 Debt Service Management  
 Miscellaneous Billing  
 Payment Card Processing  
 Point of Sale  
 Revenue Collections  
 Tax Billing and Collections



### Permitting and Land Use

Building Permits and Licenses  
 Code Enforcement  
 Computer Assisted Mass Appraisal  
 Electronic Plan Review  
 GIS  
 Inspections  
 Land Management  
 Permitting  
 Planning and Zoning



### Public Safety

Computer-Aided Dispatch  
 Fire Records Management  
 Records Management



### Enterprise Asset Management

Facilities Management  
 Fixed/Capital Asset Management  
 Fleet Management  
 Inventory Management  
 Work Orders



### Utility Billing

Customer Information Management  
 Service Order Management  
 Utility Management and Billing



### Customer Relationship Management

Customer-Facing Web Interface  
 Customer Information Management  
 Request for Service



### Justice

Municipal Court  
 Jail Management  
 Probation Management  
 Prosecution Management



### Other

Business Intelligence  
 Clerk/Recorder's  
 Contract Management  
 Document Management  
 Electronic Health Records  
 Occupational Licensing  
 Special Assessments

## 4.4 Approach and Work Plan

### Project Understanding

The City of Superior, constantly living up to its name, is a City so great they named a lake after it! The City is located in the northwest corner of the State and nestled on the western end of Lake Superior. The City is home to approximately 27,000 proud residents and boasts approximately 350 employees. The City is seeking a consulting team to assist in obtaining a vendor to provide a modernized ERP software system to meet the City's needs.

Originally purchased and implemented in 1993, the City's current system, CentralSquare Naviline, is considered a legacy software solution and is nearing the end of life. It currently serves the City's approximate 350 employees with roughly 50 active users. Naviline is posing many challenges to the City including difficulty resolving technical issues with vendors, an unintuitive interface, inadequate reporting capabilities, struggles and limitations when integrating third-party applications, impacts to City business due to work-around processes, and exposure to legal and compliance risks due to lack of vendor resources. The City's ideal modernized system would include a more centralized system that helps with managing financial activities and provides better services and information to the community. This is where BerryDunn comes in. Having worked on more than 200 comparable engagements, including over 35 with clients using Naviline/HTE, we are fully equipped to help the City on this initiative.

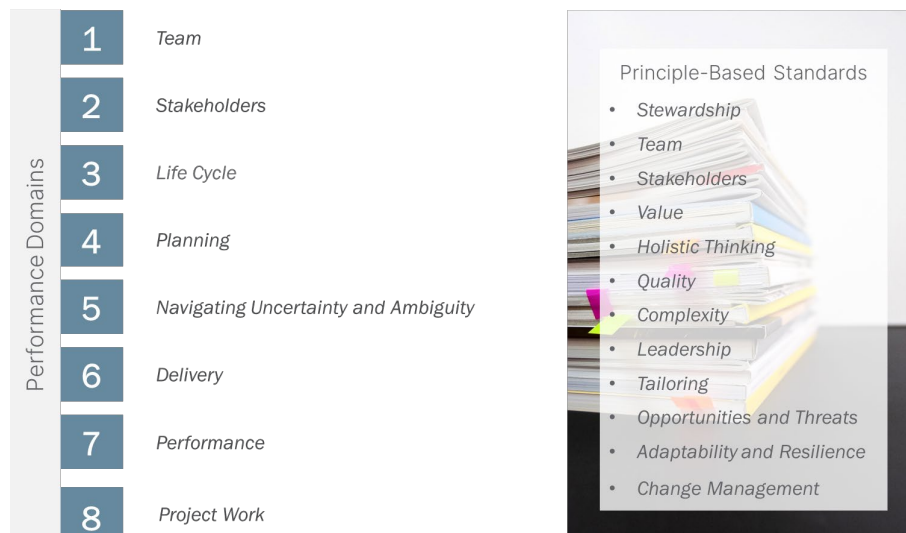
### Approach

#### Project Management

To help ensure that project objectives are met, and initiation and completion of project work are conducted in a timely manner, each BerryDunn project is led by an experienced project manager who understands and utilizes project management best practices. Our Consulting Services Team employs project management best practices from the Project Management Institute®'s A Guide to the Project Management Body of Knowledge Guide (PMBOK® Guide).

Figure 5 illustrates the standards of project management as defined by performance domains and project delivery principles that are critical for effective delivery of project outcomes.

Figure 5: Performance Domains and Project Management Guiding Principles | PMBOK® Guide





## Change Management

Stakeholders' willingness to adopt new processes and tools plays a significant role in the success—or failure—of system replacement projects. BerryDunn has observed resistance to change in virtually all our engagements. As such, our project management approach is carefully integrated with change management methodologies to promote buy-in and consensus for the project. We will work with you to proactively address resistance by:

- Engaging stakeholders at the right level throughout the project—from initial planning through implementation—to build understanding for the need for change and gain support from the people who will be using the future solutions and who are most familiar with current processes
- Developing and executing a communications plan that considers the information needs of each stakeholder group
- Documenting business processes and working with stakeholders to understand how their work will be performed in the future environment

We have adopted the Prosci® change management methodology and trained **over 100 consultants to become Prosci® Certified Change Practitioners (CCPs)**. A central focus of the Prosci® change management approach is the belief that, for change to work in an organization, individuals must be willing to change and understand change. Additionally, according to research conducted by Prosci®, the likelihood of project success increases significantly and in alignment with the level of change management focus applied to the project. Figure 6, below, shows that even small increases in focus on change management, from “poor” to “fair,” are likely to have a positive impact on system adoption and project success.

Figure 6: Change Management's Impact on Project Success



Consistent with the Prosci® methodology, the City can expect our change management approach to involve three stages:

1. **Preparing for Change** | Developing change management strategies, based on input from the City's stakeholders on the existing environment.
2. **Managing Change** | Overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan.
3. **Reinforcing Change** | Evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes.

## Work Plan

### Overview

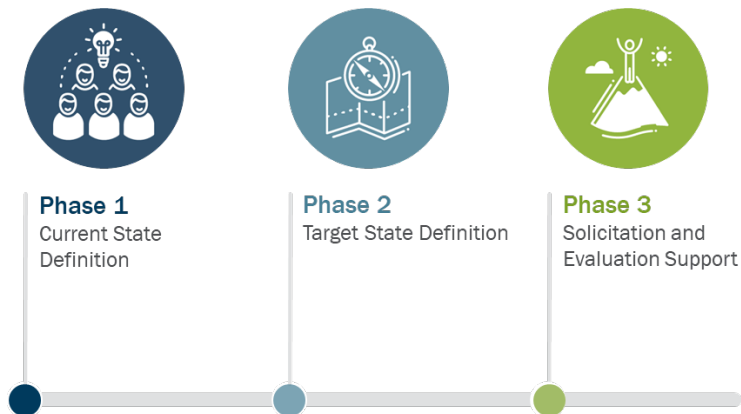
BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.**

The overarching benefits the City can expect of our approach include:

- A methodology based on our extensive experience conducting similar projects
- Quality assurance processes that incorporate the City’s review and approval of all deliverables and key milestones
- Built-in project management and change management best practices—focused on keeping the project on time, on budget, and progressing at a healthy pace—for the City’s stakeholders to understand why and how findings and recommendations will improve the current environment
- A needs assessment that will include all functional areas within scope, and focus on how those areas interact with each other and integrate with existing systems
- Thorough business process improvement activities, helping the City identify root causes of process and/or system deficiencies
- A focus on taking full advantage of the newest technology and harnessing efficiencies by reviewing business practices or implementing technology to enhance existing business processes performed by individual departments and those performed across the City
- An ability to satisfy all requirements set forth in the City’s scope of work

Figure 7 presents an overview of our work plan intended to achieve the City’s goals and objectives for this important initiative.

Figure 7: Work Plan Overview



## Details

Below and on the following pages, we provide details of our work plan to conduct the City’s project effectively and efficiently as described in Figure 7.

### Phase 1: Current State Definition

**1.1 Conduct initial project planning and project start-up tasks.** We will conduct an initial project planning session with the City’s project management team (PMT) to discuss a variety of topics, including the scope, subsequent project management tasks, risk and issues, project schedule, and stakeholders to include. We will discuss goals, objectives, and success criteria for the project. We envision that this work session will involve the group of leaders at the City who are overseeing this initiative and have the ability to commit leads and subject matter experts from their respective departments. In our experience, convening this group as a first step in the project begins to establish the governance structure for success throughout the initiative. These discussions will inform the development of the draft Project Work Plan and Schedule.

## Phase 1: Current State Definition

**1.2 Develop a Project Management Plan and Project Schedule.** Based on the information gathered from initial project planning, we will develop the Project Management Plan and Project Schedule, which will define the overall organizational structure of the project, the project team's responsibilities and reporting relationships, project approach, and work breakdown structure. After providing draft versions of these materials in advance, we will then facilitate a teleconference to review the drafts. This teleconference will serve as an opportunity to solicit feedback before updating the Project Management Plan and Project Schedule to final.

### ▲ D1. Project Management Plan and Project Schedule

**1.3 Develop Biweekly Status Updates.** Throughout the project, our project manager, Corey Claflin, will develop Biweekly Status Updates that describe the activities and accomplishments for the reporting period, plans for the upcoming month, risks or issues encountered during the reporting period, and anticipated problems that might impact any project deliverable. He will facilitate biweekly calls with the City's PMT to review the status updates.

### ▲ D2. Biweekly Status Updates and Ongoing Project Management

**1.4 Develop project initiation documents.** We will develop and distribute a strengths, weaknesses, opportunities, and threats (SWOT) web survey to understand issues and challenges with the City's current system(s). This survey will also include an OCM awareness, desire, knowledge, ability reinforcement (ADKAR) initial assessment. We anticipate issuing this survey to the core City department users and using their responses to help inform the City's current and future ERP needs assessment process. Prior to issuing the web survey, we will review questions with the City's PMT. The web survey results will act as one of many data points in developing our evaluation of the current system. We will also provide the City with an information request sheet to gather available documentation that will be helpful to us during the project (e.g., organizational charts, documentation on existing systems, and requirements). These initiation documents will also include an announcement memo and functional area listing. Once complete, we will review the SWOT web survey, OCM ADKAR initial assessment, announcement memo, and functional area listing with the City's PMT in a work session to solicit feedback before updating to them to final. As part of our development of project initiation documents, we provision a SharePoint portal, to facilitate management of project documentation.

**1.5 Administer the SWOT web survey and the information request and review the results.** Once final, we will administer the SWOT web survey and information request to the City to collect documentation and gather information prior to fact-finding meetings. We will respectfully request that the City provide the requested information in a timely fashion, in advance of our work, to enable us to be more efficient, become more knowledgeable of the current environment, and make best use of City personnel's time. We will review the documentation gathered and results of the SWOT web survey, including an analysis of the initial OCM assessment, prior to facilitating a kickoff presentation and conducting fact-finding meetings.

**1.6 Facilitate a kickoff presentation.** We will conduct a kickoff presentation with City leadership and all project stakeholders. This will serve as an opportunity to introduce our project team members, discuss goals, present our project approach and methodology, review the schedule of key project dates, and answer questions. As part of this presentation, the City's project sponsor is expected to participate and speak to the goals and objectives of the initiative.

**1.7 Facilitate on-site fact-finding meetings.** We will conduct on-site fact-finding meetings by functional area. We will also meet with technology stakeholders to discuss the technical infrastructure, City technical

## Phase 1: Current State Definition

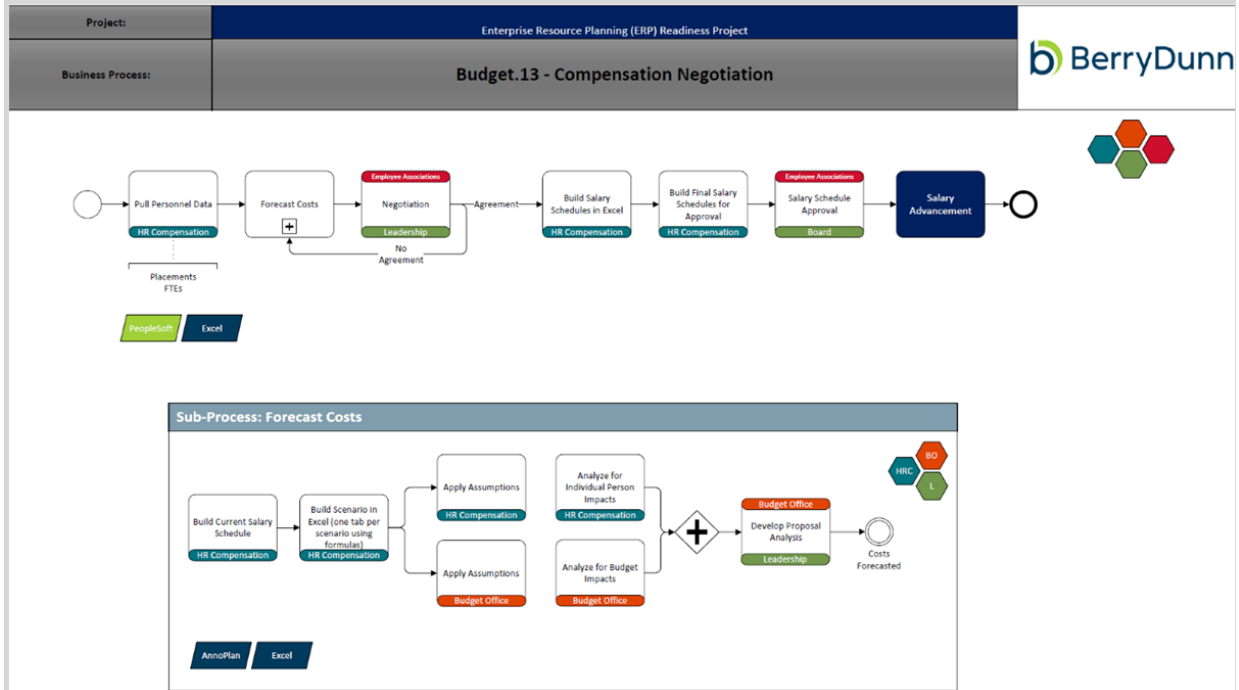
standards, integration standards and skillsets, and overall staffing. We will explore the experiences of City stakeholders in daily interaction with the City's systems and related business processes that may occur outside of City systems, along with any additional areas we identify prior to or during the kickoff presentation. The purpose of these meetings is to review, evaluate, and document existing systems and business processes. Where appropriate, we will also observe these processes firsthand.

**1.8 Facilitate RFP planning meeting with the City's procurement team.** During the initial fact-finding process, our team will meet with City procurement representatives to review and confirm the approach to planning for and developing the RFP package. The City can expect to benefit from our prior work developing numerous prior software system RFP packages for comparably situated City governments, which will allow our team to quickly get up to speed by reviewing City procurement policy, process, and templates. Our team recognizes that each RFP process and software planning project is unique, and the City can expect our team to speak directly to the unique considerations that come along with a large initiative such as that of an ERP RFP process.

**1.9 Develop Needs Assessment Report.** Drawing on the information gathered through our review of documentation, web survey results, and fact-finding sessions, we will prepare a Needs Assessment Report. This report will include but not be limited to: high-level summary description of the current state and processes; recommended improvements to current-state processes and areas for improvement that may be provided by a new ERP system; current state and future state integration, conversion, and reporting needs; primary challenges experienced by staff with the legacy ERP system; implementation planning considerations, and recommended key decisions points that will inform the RFP development strategy. When examining current-state processes we find it beneficial to do so through the lens of determining whether certain challenges are a result of technology gaps, policy constraints, or process/procedural decisions, to help validate whether additional considerations beyond replacement of an ERP system may need to be considered in order to fully maximize the value of adopting new technology. For example, with several recent clients we have heard a theme of challenges related to setting up and maintaining the vendor file within Naviline due to constraints around the number of vendor contacts and addresses that can be associated with a single entry. For some organizations this has led to work-arounds through tracking vendor information external to the ERP system, or establishing multiple variations of a vendor within the system. Defining the root cause for why this procedure is in place requires understanding how technology, policy, and procedure interact and often do not exist in siloes. We will provide a draft of the Needs Assessment to the City's PMT for review.

**1.10 Collaborate to identify processes to be diagrammed.** During fact-finding meetings, we will collaborate with the City's project team to identify which as-is business processes are critical or unique to the City and would be ideal processes to diagram. We anticipate selecting up to 15 different processes to diagram. From our experience it is those processes that involve multiple departments or stakeholders, or where there is not consensus or consistency in how processes are followed, that are best suited for business process mapping.

## Phase 1: Current State Definition



**1.11 Conduct as-is business process diagramming and follow-up as necessary.** Based on the processes identified during business process diagramming meetings, we will draft the as-is business process flows to visually depict the steps in each business process. There are numerous process documentation specifications available to visualize customer processes. Many process documenters consider the visualization an ‘art’ and pick and choose the symbols that resonate with them. This approach is not customer-centric and can lead to customer confusion and less ‘professional’ products. To address this issue BerryDunn has adopted the BPMN 2.0.2 (BPMN) standard for process documentation. This standard is registered under ISO which helps ensure high-quality documentation and systematic revisions to the standard. We will review with the City’s project team the draft process diagrams to solicit feedback and build consensus for the flows and update the as-is business process flows to final. We will follow up as necessary to help ensure these diagrams are an accurate illustration of the City’s processes.

**1.12 Develop and finalize the Needs Assessment Report.** We will deliver the Needs Assessment Report in draft format, allowing the City the opportunity to review and aggregate any questions or feedback on the findings. We will then facilitate a virtual work session with PMT to review, discuss and confirm the report. We believe that it is important to obtain the City’s validation and approval of these findings, as this information will serve as the basis for future requirements. We will then revise the report and update to final.

### ▲ D3. Needs Assessment Report

## Phase 2: Target State Definition

**2.1 Facilitate vendor outreach sessions.** One of our innovative activities we are proposing to complement the requested scope of the City— facilitating vendor outreach information sessions—will provide an opportunity for up to six ERP vendors to provide information on the capabilities of the systems on the

## Phase 2: Target State Definition

marketplace for two hours each, remotely. We will provide these vendors with a format to follow for ease of comparison. By holding these sessions, the City will be better informed when developing requirements for the future ERP solution. In addition, through our BerryDunn Bridge Program we have received feedback from vendors that service the market area the City would fall under that is an important factor to have the opportunity to participate in a process such as this, and it is likely to increase the number of options that are brought to a prospect during a future competitive RFP process. At the conclusion of these sessions, we will conduct a debrief survey to solicit feedback from participants of desired functionality to be included in the RFP for a future system. The value in these sessions is in exposing staff to what more modern software solutions look like, and how business processes may be transformed through adopting new technology—particularly for tenured staff that may be primarily familiar with the Naviline solution.

**2.2 Develop and administer a Request for Information (RFI).** We will develop an RFI and response template using a proven format that incorporates information pertaining to the history of the project and a high-level description of the City’s desired features and functions. The purpose of the RFI is to identify available system modules and functionality, implementation project timeline, and estimated costs. As part of this RFI we recommend requesting that responding vendors indicate their interest in participating in high-level yet meaningful software overviews for the City. The response template will help ensure that vendors’ responses are easy to compare as all responses will follow a particular format and provide like information. We will review the draft RFI and response template with the City’s PMT, collecting any feedback or additional terms for inclusion, before updating to final and administering.

**2.3 Analyze RFI responses and develop summary memorandum.** Included in the Market Research Memo will be identification of responses from vendors responding to the RFI providing guidance on the phasing and timelines to implement software, including necessary City staff resources/roles and allocation of time, as well as BerryDunn recommendations on steps that the City should take in preparation for the implementation process in order to ready itself, and considerations related to OCM and other best practices to begin planning for.

### ▲ D4. Market Research Memo

**2.4 Develop Preliminary Functional and Technical Requirements.** BerryDunn has developed a database of ERP-specific technical and functional requirements based on our experience with other governmental agencies, as well as our knowledge of software system functionality and best practices. Drawing from this database, we will make refinements based on those processes that are critical or unique to the City. These requirements will support supplemental functionality requirements with key reporting, interface, and conversion enhancements. In our recent experience, those areas have significantly differentiated vendors’ solutions and require a specific focus in the selection activities. Our analysis typically results in about 75% of the requirements being defined upfront for most of our clients.

### ▲ D5. Preliminary Functional and Technical Requirements

**2.5 Facilitate remote joint requirements planning (JRP) work sessions to review and update requirements.** We will facilitate a series of remote JRP work sessions with City stakeholders and our project team members to review the preliminary requirements. We will reconvene many of the same stakeholders, organized by functional area that met during fact-finding activities to discuss the future system capabilities. These sessions will also include one focused on the technical aspects involved with the City’s project. Using the preliminary list, we will review and confirm each item and assign a relative criticality to communicate to vendors responding to the list as part of their RFP responses. We will also facilitate similar meetings to

## Phase 2: Target State Definition

review potential interfaces and data conversion objects. Once these have been reviewed, we will update the list to final.

Our role in facilitating the JRP work sessions involves contributing our focused knowledge of the vendor marketplace to align the items requested in the list with the goals and objectives of the project. For example, we might comment on where functionality being requested is beyond the core capabilities of vendors and might represent a cost increase. Conversely, we can advise on requirements to include that might be commonplace today, but beyond the familiarity of City stakeholders.

### ▲ D6. Final Functional and Technical Requirements

**2.6 Develop an RFP/Scope of Work Package.** We will develop an RFP/Scope of Work Package using a proven format that incorporates information pertaining to the history of the project, a high-level description of the City's current environment, the City's desired approach to implementing a new ERP solution, the City's Final Functional and Technical Requirements, and a structured list of points for vendors to address in their responses. Our project team will also work with the City to develop objective evaluation criteria to include in the RFP. We will then prepare a scoring matrix to track significant strengths and limitations of each proposal reviewed, based upon established evaluation criteria. Once complete, we will meet with the City's PMT to review the draft RFP/Scope of Work Package, collecting any feedback from various departments or additional terms for inclusion, before reviewing the City's legal requirements and submitting the RFP to the City's procurement team for review and approval. Once the RFP/Scope of Work Package is updated to final, we will provide it to the City's PMT for distribution through its standard channels. In addition, we can provide a distribution list that includes most of the major ERP solution vendors in the market.

### ▲ D7. RFP/Scope of Work Package

## Phase 3: Solicitation and Evaluation Support

**3.1 Assist with responding to vendor questions and developing addenda.** Our project team will assist the City in responding to vendor questions in an objective and timely manner, in accordance with the City's guidelines, and develop corresponding addenda.

**3.2 Assist with facilitating a vendor pre-proposal conference.** Our project team will coordinate, plan, and lead a pre-proposal virtual meeting for interested vendors, facilitating the question-and-answer portion of the meeting. We will then compile a list of questions raised and will prepare suggested responses on the City's behalf. These will be provided in a format that the City can review, revise, and ultimately publish as an addendum to the RFP, as determined by the City's procurement team.

**3.3 Perform an initial completeness review of vendor proposals received, identify initial items for clarification, and develop a Proposal Executive Summary Memo.** We will facilitate the proposal review process by analyzing vendor proposals compiling them in a single, executive-level Proposal Executive Summary Memo. The Memo will include an objective review and comparison of vendor responses to the City's Functional and Technical Requirements, as well as summarize and show comparative analysis of other components of vendor proposals in alignment with the defined RFP evaluation criteria. We have planned for reviewing up to eight vendor responses.

**3.4 Facilitate a round one scoring meeting to identify short-listed vendors and items needing clarification.** Our approach is to facilitate client scoring meetings from an independent and objective stance, and to

### Phase 3: Solicitation and Evaluation Support

prompt discussion on certain elements of each vendors proposal from a neutral stance. We have found that this approach helps to instill a sense of ownership in clients in reviewing and identifying a short-list of vendors to move forward in the process without the need for our team to participate in the subjective review and scoring process.

#### ▲ D8. Solicitation Support, Proposal Executive Summary Memo and Short-List Identification

**3.5 Facilitate a demonstration planning work session.** We will meet with the City's PMT to discuss the format of vendor demonstrations and software demonstration scripts. We will develop a draft demonstration script template and provide it to the City's team for review. After finalizing an approved version, we will provide the appropriate scripts to each vendor in advance of demonstrations and develop demonstration scenarios.

**3.6 Develop demonstration scenarios based on meeting with City staff.** These structured scenarios will be used to help guide the demonstrating software providers with the flow of presentations as well as the scope of what should be shared with the City. This will help mitigate against an open sales presentation and focusing the evaluation on as comparable presentations as feasible.

**3.7 Facilitate pre-demonstration conference calls with short-list vendors.** The BerryDunn and City project teams will facilitate pre-demonstration conference calls with short-listed vendors to set clear expectations about the format and approach to demonstration and implementation activities.

**3.8 Facilitate vendor demonstrations.** We will attend demonstrations and assist the project team with facilitation for a period of up to six days. Our project team's extensive background in the demonstration process will provide the project team with a unique perspective on how to score, prepare, evaluate, and participate in vendor demonstrations. Through this process, our clients have found value in our participating in the demonstration process to help ensure that there is a structured and predictable process as our clients consider varying solutions, and helping to ensure that the demonstration process is focused on the actual scope of software and services proposed. Further, our experience in facilitating the demonstration process for clients has enabled us to provide increased value in helping to consolidate follow-up clarifications and contribute to the evaluation committee's subsequent discussions in the evaluation.

**3.9 Facilitate a round two scoring meeting to identify preferred vendors.** Similar to the round one scoring process, our team will serve as active advisors during the City's scoring process by tracking open items and questions from the demonstration process, encouraging open dialogue on key takeaways from the demonstration process, and helping to summarize key themes shared by City participants in support of the City evaluation committee conducting the scoring.

#### ▲ D9. Demonstration Guidance and Facilitation

**3.10 Assist in planning for reference checks and site visits.** We will assist the City's PMT with identifying tasks that should be accomplished prior to meeting at each site and clarify any additional open items. We will coordinate with the City's PMT to discuss the suggested approach for reference checks.

**3.11 Facilitate a final scoring meeting.** We will participate in the final round of vendor scoring following the completion of reference checks and site visits. The objective will be to identify a preferred vendor and a second-choice vendor should contract negotiations with the first be unsuccessful.

#### ▲ D10. Preferred Vendor Identification Support



### Phase 3: Solicitation and Evaluation Support

**3.12 Facilitate contract negotiation planning meeting.** We will facilitate a contract negotiation planning meeting with the City's defined contracting team, including legal representation. During this meeting, we will define the anticipated timelines for contracting, routing and approval processes, as well as key negotiation strategy elements to carry forward into the contracting process.

**3.13 Support the City in the contract negotiations and approval process with its preferred vendor.** At the conclusion of final scoring activities, we anticipate supporting the City with the contract negotiations and approval process when and where it will benefit the City most. We have been involved in this process from the client, vendor, and independent consultant perspectives and understand how the associated support needs vary and how the contract impacts the eventual implementation process. In conducting contract approval and negotiations activities, we will draw on these experiences to help ensure the City's best interests are met and project goals and objectives are achieved.

Working collaboratively with the City's PMT, legal counsel, and preferred vendor, among other stakeholders, we will take part in various activities, including but not limited to:

- Developing a draft contract, using the City's contracting procedures and the vendor's proposal as starting points
- Reviewing the contract documents with the City's PMT to help ensure that requirements are clearly defined and to establish that the City agrees to the schedule, implementation process, fee arrangement, scope of services, vendor resources, deliverables, costs, acceptance criteria, and terms and conditions
- Participating during negotiations with the preferred vendor
- Supporting presentation development and delivery to City leadership as it relates to receiving approval and contract execution

Should it become clear at any point during contract approval and negotiations that the preferred vendor's solution or contract terms will not meet the needs of the City, we might recommend halting the process with that vendor and commencing efforts with the second-choice vendor.

In recognition of the many variables not yet known related to the contract approval and negotiation timeline and work effort, we plan to commit up to 40 hours.

#### ▲ D11. Contract Negotiations and Approval Assistance

### Phase 4. Implementation Assistance

We are prepared to offer two potential implementation assistance service options. We describe these two potential service options on the following page for further review and consideration.

## Phase 4. Implementation Assistance



### Full-Time Management

*With this level of service, our project team will act as the implementation project manager. In this role, we will identify project risks and issues, monitor project activities, provide recommendations to mitigate risks, and lead the coordination of vendor activities. There will be minimal project management tasks owned by stakeholders. This level of service assumes the client will provide a PMT that we will oversee.*



### Implementation Oversight

*With this level of service, we will act as an active advisory to an individual the client designates as project manager. We will also lead select implementation activities we mutually agree upon and likely to include project plan reviews, configuration and analysis support, testing, training, and production cutover support.*

We are happy to customize our approach to providing implementation assistance with the City at the appropriate time to help ensure we provide its desired level of support. We have found that for some clients, the level of project management implementation assistance may be driven in part by the software solution selected as well as budgetary considerations, and we strive to always be flexible to meet our clients where they are.

**4.1. Develop Project Charter.** Based on our initial project planning discussions, we will draft a Project Charter that encompasses the full scope of the City's implementation. This governance document will include a change management plan, stakeholder register, communication plan, risk and issues register, and status report templates. We will provide the Project Charter in draft version to the City and facilitate a remote session with the City's PMT to discuss the documents and collect feedback. We will then update the documents and submit them to the City in final form.

#### ▲ Deliverable 10 – Project Charter

**4.2 Review vendor implementation plans.** We will provide an in-depth review of the vendor's implementation plans, including the Project Management Plan and Project Plan. We will discuss our recommended changes and considerations with the City's PMT before communicating requested changes to the vendor. The goal is to collaboratively discuss preferred changes based upon the City's vendors, and BerryDunn's collective experience and perspective for the most advantageous end products.

#### ▲ Deliverable 11 – Project Plan Review

**4.3 Develop Project Management Documents.** Following the review of the vendor's plans, we will develop any necessary supplemental materials we believe to be critical to the City's implementation. These may include further definition of stakeholders, risk management, project documentation, and other items. The content areas will be determined by what is included in the vendor's plans with the goal of removing any redundancy that might cause confusion to project stakeholders. This documentation will be reviewed and confirmed with the City's project team before being put into use.

#### ▲ Deliverable 12 – Project Management Documents

**4.4. Conduct implementation activities.** One of the keys to project success is enabling the City's teams to take on appropriate roles and responsibilities and to make informed decisions for both implementation and

**Phase 4. Implementation Assistance**

long-term operational success and ownership of the software. Our project management approach is designed with this in mind. We will provide specialized expertise throughout the project.

Throughout the implementation, we will bring our prior implementation and local government experience to provide a forward-looking perspective, reduce risk, and promote the achievement of the goals and objectives for the project. We anticipate being involved in the following key project management or oversight activities of the implementation, as shown below and on the following page.

No	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
1	Reviewing the Project Management Plan and Schedule in conjunction with other PMT members	✓		✓	
2	Managing the project scope, deliverables, and timeline with assistance from other PMT members	✓			✓
3	Helping to ensure that the project team stays focused, tasks are completed on schedule, and that the project stays on track	✓			✓
4	Coordinating project tasks with assistance from other PMT members	✓			✓
5	Functioning as the main point of contact for the vendor’s project manager, participating in daily project activities (when applicable), and tracking project tasks	✓			✓
6	Facilitating an implementation kickoff meeting	✓			✓
7	Holding monthly meetings with the City to update project status and budget status, and to research a verdict on any escalated process decisions that need to be made	✓		✓	
8	Reviewing the project budget, including change orders, and the vendors’ contract compliance	✓			✓
9	Facilitating City staff’s development of workflow processes for each department		✓		✓
10	Facilitating the data conversion process with the vendor and City staff		✓		✓
11	Facilitating the development of software interfaces/integrations with the vendor and City staff		✓		✓

No	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
12	<p>Working with the vendor and City staff and helping to ensure vendor accountability by:</p> <ul style="list-style-type: none"> <li>Identifying any opportunities to leverage technical enhancements to improve the products and services delivered to the City</li> <li>Facilitating the gathering and sharing of any technical information requested by the vendor</li> </ul>	✓			✓
13	<p>Providing risk management, including the following:</p> <ul style="list-style-type: none"> <li>Identifying project risks</li> <li>Developing mitigation strategies</li> <li>Communicating project risks to City and vendor staff</li> <li>Assigning key activities to mitigate or resolve project risks</li> </ul>	✓			✓
14	<p>Providing weekly or biweekly tracking of the following:</p> <ul style="list-style-type: none"> <li>Reporting of project risks and issues</li> <li>Recently completed tasks and upcoming project activities</li> </ul>	✓			✓
15	<p>Providing change management oversight, including the development and maintenance of a Change Management Plan that may include the following:</p> <ul style="list-style-type: none"> <li>Target State Definition</li> <li>Change Structure and Governance Approach</li> <li>Change Impact Assessment</li> <li>Stakeholder (or User) Analysis</li> <li>Communication Plan</li> <li>Behavior Change Plan</li> </ul>	✓			✓
16	<p>Managing the User Acceptance Testing (UAT) process, including:</p> <ul style="list-style-type: none"> <li>Reviewing the vendor's test plan and any applicable test scripts</li> <li>Providing assessment of testing activities</li> <li>Providing recommendations for modifications to the testing plan to increase the likelihood of success</li> <li>Directing City staff in the development of tailored test scripts</li> </ul>	✓		✓	

No	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
	<ul style="list-style-type: none"> <li>Managing logistics related to scheduling UAT activities</li> <li>Providing analysis of test results</li> <li>Overseeing regression testing and required configuration changes</li> </ul>				
17	Facilitating oversight of vendor training activities, including: <ul style="list-style-type: none"> <li>Reviewing the vendor’s training plan and training materials</li> <li>Overseeing vendor training activities</li> <li>Providing recommendations for modifications to the training delivery</li> <li>Providing feedback on the vendor’s training documentation</li> </ul>	✓		✓	
18	Conducting a go-live readiness assessment per phase of the project, and produce a readiness assessment memo. The purpose is to meet with key stakeholders involved in project to review overall readiness of the City to move into the Go-Live stage of the project and prepare for production use of the new software system. This includes interviews to discuss each of the Readiness Assessment Areas with participants to understand the current status and tasks remaining prior to Go-Live. The information collected will be used to report overall readiness and make a recommendation on the move to a live environment.	✓		✓	
19	Providing go-live support	✓			✓
▲ Deliverable 13 – Implementation Activities					
<p><b>4.5 Conduct a project closeout work session.</b> This work session will involve discussing project lessons learned, measuring achievement of project goals and objectives, discussing incomplete implementation tasks, and conducting transition planning for moving to long-term operation of the ERP solution and associated policies and processes. We will document all the items discussed in a Project Closeout Memo.</p>					
<p><b>4.6. Develop a Project Closeout Memo.</b> Based on the information gathered from our closeout work session, BerryDunn will develop a Project Closeout Memo, which will document lessons learned, compare project outcomes to project goals and objectives, list any remaining action items to conclude the implementation, and identify tasks, roles, and responsibilities for transitioning to operational use of the ERP solution and associated policies and processes.</p>					
▲ Deliverable 14 – Project Closeout Memo					

## Anticipated Schedule

Below, we outline our proposed project schedule for the City’s requested work effort. We are happy to adjust this schedule to best accommodate the City’s needs, as appropriate.

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Phase 1	█											
Phase 2					█							
Phase 3								█				

## Potential Challenges and Mitigation Strategies

All systems-related projects experience varying challenges and barriers. Some are anticipated and can be planned for, while others the City may have little control over. To help avoid challenges, our team has spent a considerable amount of time considering potential risks that may negatively impact this initiative and strategies that can be used to address them. Below and on the following page, we present potential risks and strategies to mitigate them for the City’s further review and consideration.

- Executive Sponsorship.** For this project to succeed, the City leadership must fully support it and take an active role in key decision-making activities. They must be visible, vocal, and active supporters, communicating the vision for the future. Early on, we will work with the City leadership to define their role in effective communications and to gain agreement on the governance and decision-making model employed on the project.
- Effective Project Management.** Managing scope, schedule, and budget helps to ensure the project achieves its intended objectives. In the absence of an experienced individual dedicated to performing these activities, timelines may slip (or not be developed); project objectives may be compromised; and cost overruns may be experienced.
- Delays in the Project Timeline.** Factors may come into play that will impact the schedule, such as staff availability and time for leadership decision-making related to the project. We will work with the City to mitigate these risks to the timeline through advanced planning and accounting for known absences (such as holidays and vacations) in the schedule, as well as by providing regular updates on progress and relevant matters throughout the project. To address delays over which our team and the City may have less control, we will offer flexibility in how and when we gather the information to keep the project on track.
- Stakeholder Participation.** It will be important for the City and key project stakeholder groups to dedicate sufficient resources throughout the duration of the project to help ensure completion of project objectives in a timely manner. We understand that individuals contributing to the initiative have other daily responsibilities that are a priority. As part of our planning activities, we will partner with the City to determine the right staff to involve in each phase of this project based on factors such as subject matter expertise and availability. Our approach attempts to minimize the impact on the City staff by having us perform as much work in advance as possible and by engaging stakeholders in ways that promote tangible results and contributions. During project planning, we will also develop a high-

level estimate of staffing and resource needs for subsequent project activities and define the roles and time commitments required of each resource.

- Managing Expectations.** During project initiation, we will review the project timeline with the City to assess its reasonableness and determine if tasks should be extended across a longer period. In addition, as part of ongoing communication and project management, we will continually assess project progress, factoring in quality. We will raise these risks with the City early to determine the best approach for mitigation, constantly keeping our eye on the bigger picture.
- Project Governance and Decision-Making.** An effective governance structure must be established to guide project efforts, make key decisions, and help manage risks and issues. Establishing a governance committee with clear roles, responsibilities, and lines of authority will help prevent project delays due to lack of decision-making—or decisions being made without appropriate authority and/or key stakeholder inputs. We will discuss the project’s governance structure with the City—and make recommendations accordingly—during project initiation.
- OCM.** BerryDunn has experienced resistance to change in nearly all our engagements, reinforcing our belief that the management of change is crucial to the success of such an initiative. Often, organizations have developed and adhered to existing processes over the course of several years, and staff are reluctant to change their way of doing things. Our team, which includes Prosci® CCPs, is qualified to provide change management structure to this project, where appropriate, in collaboration with the City. It is important for the City leaders, frontline managers, and supervisors to understand the drivers of this resistance. Resistance can come from many areas, including staff fears that they will not be able to perform their new responsibilities, their role will be diminished in importance, and/or they may lose their job. That said, it is also important to include staff’s input into the assessment so they feel more invested in the changes occurring. Communicating the value of the change by explaining what is in it for staff is a critical component of moving staff along the change management path. We will remain cognizant of, and sensitive to, these factors and perceptions in our communications from project initiation to implementation.

### Expected Participation of City Personnel

Commitment from all project participants is critical to producing a successful outcome; however, we understand that the project participants have regular commitments outside this project. Therefore, we will work as independently as possible, plan and communicate well, and bring in City staff and stakeholders as needed and in a manner that facilitates tangible contributions and results.

Table 3, on the following page, outlines the roles, responsibilities, and estimated time commitments we anticipate from City personnel in this system selection process. The actual time commitments vary from site to site based on the staffing mix, tenure and knowledge of staff of legacy systems and processes, as well as general availability of City staff to spend on the project. We expect to be able to work closely with the City to review the time commitments for staff, and adjust as necessary to help ensure staff are making the best use of their time on this critical initiative while continuing to carry out regularly assigned duties. We will be able to better estimate City involvement in the eventual implementation effort when City nears closer to selecting its preferred vendor.

*Table 3: Estimate of Expected Participation of City Personnel*

Role	Description/Responsibilities	Estimated Hours
Project Sponsor	<ul style="list-style-type: none"> <li>Provide executive support, sponsorship, and overall</li> </ul>	10 – 15

Role	Description/Responsibilities	Estimated Hours
	<p>direction and tactical vision for the project</p> <ul style="list-style-type: none"> <li>• Commit/assign resources to the project</li> <li>• Participate in project kickoff meeting and stress goals and objectives for the project to City staff</li> <li>• Provide executive-level decision-making when needed and maintain overall responsibility for the project</li> <li>• Distribute communications, as necessary, that support the project and provide it with adequate visibility and priority</li> </ul>	
<b>Project Manager / Project Lead</b>	<ul style="list-style-type: none"> <li>• Maintain overall responsibility for the project and act as main point of contact between BerryDunn and the City</li> <li>• Circulate deliverables for review, collect feedback, and provide sign-off</li> <li>• Participate in the project kickoff meeting and stress goals and objectives for the project to City stakeholders</li> <li>• Participate in key work sessions</li> <li>• Assist in collecting background documentation and share with BerryDunn in advance of our work</li> <li>• Provide names and contact information for City employees involved in project</li> </ul>	80 – 120
<b>Project Team</b>	<ul style="list-style-type: none"> <li>• Prepare for interview(s) as needed</li> <li>• Provide necessary feedback and subject matter expertise to help inform BerryDunn’s project deliverables</li> <li>• Participate in project meetings and work sessions</li> <li>• Review project deliverables</li> </ul>	60 – 100
<b>Department End-Users</b>	<ul style="list-style-type: none"> <li>• Complete the web survey</li> <li>• Assist with compiling requested documentation</li> <li>• Participate in related fact-finding meetings</li> <li>• Review project deliverables associated with the analysis phase</li> <li>• Participate in requirements review work sessions</li> <li>• Participate in vendor demonstrations</li> </ul>	40 – 80
<b>Evaluation Team and Contract Team</b>	<ul style="list-style-type: none"> <li>• Review vendor proposals and Proposal Executive Summary Memo</li> <li>• Participate in vendor scoring meetings</li> <li>• Participate in vendor demonstrations</li> <li>• Participate in vendor reference checks and site visits</li> <li>• Participate in vendor contract negotiations, as necessary</li> </ul>	60 – 80



Role	Description/Responsibilities	Estimated Hours
<b>Technical Team</b>	<ul style="list-style-type: none"> <li>• Participate in related fact-finding meetings</li> <li>• Review project deliverables associated with the analysis phase</li> <li>• Participate in requirements review work sessions</li> <li>• Participate in vendor demonstrations</li> </ul>	10 – 30
<b>OCM Team – if available/assigned</b>	<ul style="list-style-type: none"> <li>• Assess organizational readiness</li> <li>• Assist with project communication efforts</li> <li>• Monitor change resistance</li> </ul>	30 – 60

## 4.5 Cost

Table 4 presents the fixed-fee costs associated with our proposed work plan. These fees are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City's signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance. As a reflection of our interest in partnering with the City on this important initiative, we have extended to the City a greater than 15% reduction in our fees, with no associated reduction in the anticipated work effort on our end.

Table 4: Fixed-Fee Project Costs

Deliverable	Total
<b>Phase 1: Current State Definition</b>	<b>\$60,000</b>
<b>Deliverable 1:</b> Project Management Plan and Project Schedule	\$5,000
<b>Deliverable 2:</b> Biweekly Status Updates and Ongoing Project Management	\$15,000
<b>Deliverable 3:</b> Needs Assessment Report	\$40,000
<b>Phase 2: Target State Definition</b>	<b>\$34,000</b>
<b>Deliverable 4:</b> Market Research Memo	\$8,000
<b>Deliverable 5:</b> Preliminary Functional and Technical Requirements	\$5,000
<b>Deliverable 6:</b> Final Functional and Technical Requirements	\$16,000
<b>Deliverable 7:</b> RFP/Scope of Work Package	\$5,000
<b>Phase 3: Solicitation and Evaluation Support</b>	<b>\$39,500</b>
<b>Deliverable 8:</b> Solicitation Support, Proposal Executive Summary Memo, and Short-List Identification	\$11,000
<b>Deliverable 9:</b> Demonstration Guidance and Facilitation	\$13,500
<b>Deliverable 10:</b> Preferred Vendor Identification Support	\$4,000
<b>Deliverable 11:</b> Contract Negotiations and Approval Assistance	\$11,000
<b>Fixed-Fee Services Total</b>	<b>\$133,500</b>
<b>Not-To-Exceed Travel Estimate</b>	<b>\$9,500</b>
<b>Total, Not-To-Exceed Fee</b>	<b>\$143,000</b>

*\*Travel expense will only be billed as incurred.*

We will submit monthly progress invoices based on the work completed toward each deliverable.

Compensation for performance of any additional scope requested by the City for services or deliverables not in the scope of our proposal will be based on hourly billing rates, indicated in Table 5 on the following page. In

Table 5, we have presented the City with our actual hourly rates by project team member; however, we would be pleased to offer the City a reduced hourly rate, using a blended rate of \$225/hour, for any future change orders during Phases 1 – 3 of our work plan as per the City’s request in Section 7 of its RFP.

*Table 5: Project Team Hourly Rates*

Project Team Member	Hourly Rate
Ryan Doil, Project Principal	\$525
Corey Claflin, Project Manager	\$290
Allisha Ouellette, Lead Business Analyst	\$210
Ross DeFalle, Business Analyst	\$290
Jon Sullivan, Business Analyst	\$210
Erin Provazek, Technical Lead	\$390
Kate Offerdahl-Joyce, Procurement Lead	\$290

Table 6, below, presents the estimated fees associated with our work plan as it relates to providing ERP implementation project management services. We anticipate the implementation to primarily be conducted remotely, as that has been our experience with similar clients, and we have factored this into our travel estimates in Table 6, below. For the purposes of providing estimates, we are assuming a range of months and hours for implementation project management or project oversight. We are proposing a blended hourly rate of \$235 valid through June 30, 2026, after which time the hourly rate may be subject to an increase of up to 4%.

*Table 6: Implementation Project Management*

Phase	Duration (months)	Hours (per month)	Total Hours	Total Services Cost	Estimated Travel Cost
Project Management	12 - 15	80 - 130	960 - 1,950	\$225,600 - \$458,250	\$37,400

## 4.6 Subcontractors

We are proud to state that our proposed team has the qualifications and experience necessary to conduct this work effort without the use of any subcontractors.

**13. Statement of Qualifications Reference Form**

Applicant Firm Name: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, and Zip Code: \_\_\_\_\_  
Telephone: \_\_\_\_\_

Reference #1

Owner or Company Name: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Type of Service(s) Provided: \_\_\_\_\_  
Calendar Year(s) of Service(s) Provided: \_\_\_\_\_  
City, State, and Zip Code: \_\_\_\_\_  
Telephone: \_\_\_\_\_

Reference #2

Owner or Company Name: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Type of Service(s) Provided: \_\_\_\_\_  
Calendar Year(s) of Service(s) Provided: \_\_\_\_\_  
City, State, and Zip Code: \_\_\_\_\_  
Telephone: \_\_\_\_\_

Reference #3

Owner or Company Name: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Type of Service(s) Provided: \_\_\_\_\_  
Calendar Year(s) of Service(s) Provided: \_\_\_\_\_  
City, State, and Zip Code: \_\_\_\_\_  
Telephone: \_\_\_\_\_

## 4.8 Qualification Evaluation Checklist

### 12. Qualification Evaluation Checklist

Owner: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

**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? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2.	Has your firm ever failed to complete any work awarded to you? Comment/Explanation:

Yes	Sub	No	#	Question
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.	Has your firm ever defaulted on a contract? Comment/Explanation:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.	Has your firm ever had claims filed for errors and omissions or been sued for services you provided? Comment/Explanation:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5.	Is your firm willing to provide (at no cost to the City) an on-site presentation to the City regarding your firm's qualifications? Comment/Explanation:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6.	Have you reviewed the example of the service contract attached and are willing to sign a similar agreement? Comment/Explanation:

## Question 2. Has your firm ever failed to complete any work awarded to you?

Comment/Explanation:

**West Virginia Bureau for Medical Services:** In April 2008, BerryDunn was awarded a three-year contract to provide project management services for the West Virginia Bureau for Medical Services. Upon completion of our three-year contract, the Bureau exercised its option to utilize all extensions afforded to it, which resulted in BerryDunn being contracted through June 2015. In February 2015, with the project management services contract nearing completion, the Bureau issued a Request for Quotation to re-procure project management services. BerryDunn submitted a proposal and was notified in April 2015 that our firm was the selected vendor, with an anticipated contract start date of May 9, 2015. In order to avoid overlap between BerryDunn's existing contract and the new contract, the Bureau cancelled BerryDunn's contract approximately eight weeks prior to the scheduled completion date. The cancellation of our existing contract was in no way a reflection of BerryDunn's performance, but instead was a necessity in order to proceed with BerryDunn's new contract with the Bureau.

**City of Goodyear, Arizona:** The City of Goodyear, Arizona, engaged BerryDunn in August 2013 to provide enterprise resource planning (ERP) system consulting services to assess the City's software needs and assist in the selection of a replacement system. Upon the City's selection of an ERP solution, the City extended its contract with BerryDunn to include full-time project management for the ERP system implementation project. In August 2015, following extensive efforts on the part of the City to resolve issues with a separate third-party system integrator, the City put the ERP system implementation project on hold. As a result, in September 2015, the City exercised its ability to cancel BerryDunn's contract for convenience. The cancellation of our contract was the result of the indefinite postponement of the City's implementation project and was in no way related to BerryDunn's performance.

Should the City desire additional information, we would be happy to provide contact information for a representative of the State of West Virginia and/or City of Goodyear, upon request.

## Question 4. Has your firm ever had claims filed for errors and omissions or been sued for services you provided?

Comment/Explanation:

In our 50-year history, we have had been involved in three litigation cases. The cases, all of which are unrelated to the consulting services we offer, are outlined below.

**Blackwood v. BerryDunn** was an employment case in the Southern District of West Virginia Civil Action No: 2:18-CV-1216. All claims other than a claim of Breach of Promise/Detrimental Reliance based on a dollar amount of just over \$4,000 were dismissed. BerryDunn settled the remaining claim and the Court of Appeals went on to affirm the lower court's decision in December of 2020. In April of 2022, Blackwood filed an amended complaint in state court, once again raising the issues that were already litigated. BerryDunn has asked the court to recognize that the issues have already been decided, and to strike the complaint.

**Inter-Lakes Health Inc. and related entities** sued the firm in June 2006 in Essex County, New York (Index No. 000439-06) for return of fees paid to the firm. The case has not advanced beyond the discovery phase and the firm believes that the claims are baseless. There has been no activity in this case since the fall of 2010.

**Bankers Bank Northeast, et al. v. Everett L. Ayer, et al.** (D. of Me 2014) involved the default of an \$18M loan Bankers Bank Northeast (BBN) made in 2008 to the former Savings Bank of Maine. Following the global financial crisis and reorganization of the Savings Bank of Maine, Bankers Bank Northeast attempted to recover its business loss and alleged, inter alia, that BerryDunn's audited financial statements from 2007



misrepresented Savings Bank of Maine's financial fitness, which BBN allegedly relied upon in making its loan decision. BerryDunn vigorously denied these claims and maintains that its 2007 audit report follows U.S. Generally Accepted Accounting Principles (GAAP) and U.S. Generally Accepted Auditing Standards (GAAS). The case settled for an undisclosed amount in 2014.

**Question 6. Have you reviewed the example of the service contract attached and are willing to sign a similar agreement?**

**Comment/Explanation:**

We have one negotiable, requested exception to language in the City's RFP. We believe in being fully transparent about any potential conflicts at the time of proposal. As consultants focused on government clients, we are aware of the limitations on exceptions and additional constraints. If selected, we fully expect to work with the City to reach an agreement on these terms that is fair and beneficial to both parties.

**Indemnification.** Respectfully, we request the opportunity to negotiate the indemnification language during the contract process. We would like to use the following language, "BerryDunn agrees, to the fullest extent permitted by law, to indemnify and hold harmless the City against damages, liabilities, and costs arising from the negligent acts of BerryDunn in the performance of professional services under this Agreement, to the extent that BerryDunn is responsible for such damages, liabilities, and costs on a comparative basis of fault and responsibility between BerryDunn and the City. BerryDunn shall not be obligated to indemnify the City for the City's own negligence."

## 4.9 Statement of Investigation

On behalf of BerryDunn, we confirm that we have conducted 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. We agree that we are satisfied by our own investigation and research regarding all such conditions, and that our conclusion to enter into the Service Agreement is based upon such investigation and research, and we 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.

**9. Enterprise Resource Planning Software Selection Advisory Services**

Date: \_\_\_\_\_

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):** \$ \_\_\_\_\_

**Amount in written figures:** \_\_\_\_\_

**Completion Date:** \_\_\_\_\_ (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 \_\_\_\_\_

Print Name \_\_\_\_\_

Name of Company \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail Address \_\_\_\_\_

**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)	_____	_____
2)	_____	_____
3)	_____	_____
4)	_____	_____
5)	_____	_____

Submitted by:      COMPANY \_\_\_\_\_  
                            ADDRESS \_\_\_\_\_  
                            COMPANY REPRESENTATIVE \_\_\_\_\_

**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. _____	Dated: <u>April 1, 2024</u>
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.

\_\_\_\_\_  
Company

  
\_\_\_\_\_  
Representative Signature

## Appendix B: Resumes



### Ryan Doil, MBA, Prosci® CCP, CPPB, NIGP-CPP

*Project Principal | Principal*

#### EDUCATION AND CERTIFICATIONS

MBA, University of Southern  
Maine

BA, Political Science and History,  
University of Vermont

Prosci® Certified Change  
Practitioner

Certified Professional Public  
Buyer (CPPB)

Certified Procurement  
Professional (NIGP-CPP)

National Institute of Government  
Procurement (NIGP) - Member

**Ryan Doil** is a principal in BerryDunn's Local Government Practice Group who has worked both in procurement in the public sector and with public sector clients, including K-12 public education clients. Through this work, Ryan offers a valuable perspective on the effective oversight of complex, multi-organizational government information systems management, procurement processes and compliance, and organizational change.

#### RELEVANT EXPERIENCE

**Project/Engagement Management:** Ryan has overseen projects similar in scope and size to the services requested by the City for a number of BerryDunn clients. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects.

**RFP Development and System Selection:** Leveraging his public-sector procurement experience, as well as his knowledge of project and software systems, Ryan is uniquely situated to facilitate the development and issuance of effective and thorough RFPs. Working jointly with client staff, he has helped to develop and issue more than 100 software replacement RFPs. He also has extensive experience leading organizations through ERP system selection projects, working with stakeholder groups to confirm current environment challenges and business drivers, document future system requirements, and lead a collaborative and structured system evaluation process.

**OCM/Organizational Development:** Ryan is a Prosci® Certified Change Practitioner and led BerryDunn's Change Management Community of Practice (CMCOP) for two years. He has also led projects from an executive sponsor position where he became accustomed to tailoring messaging for leadership teams to help prompt actionable steps.

#### REPRESENTATIVE CLIENTS

- ▶ Chicago Metropolitan Agency for Planning, IL
- ▶ City and County IT Commission, WI
- ▶ City of Boca Raton, FL
- ▶ City of Cedar Falls, IA
- ▶ City of Detroit, MI
- ▶ City of Edina, MN
- ▶ City of Lakeville, MN
- ▶ Hamilton County, IN
- ▶ Lake County, IL
- ▶ Outagamie County, WI
- ▶ Peoria County, IL
- ▶ Saginaw County, MI
- ▶ Village of Downers Grove, IL
- ▶ Village of Oak Park, IL
- ▶ Washtenaw County, MI
- ▶ Waste Commission of Scott County, IA



## Corey Claflin, COBIT, CAPM®

*Project Manager | Senior Consultant*

### EDUCATION AND CERTIFICATIONS

BA, Economics and Political Science, University of Maine

COBIT® 2019 Foundations Certified, ISACA

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

**Corey Claflin** is a senior consultant with our Local Government Practice Group and leader of the Health and Community Services Practice. He regularly assists clients with project support, building off his experience gained through providing project management services, business process improvement insight for internal payroll systems, and software analysis for efficiencies and increased utilization.

### RELEVANT EXPERIENCE

**Project Management:** Corey is an experienced project manager. He has led projects through the full life cycle—from software assessments to procurement and vendor evaluation through implementation project management and OCM. He is adept at stakeholder engagement and buy-in and experienced in identifying project risks and deploying mitigation strategies.

**Business Process Improvement:** Corey regularly provides insight on ways to streamline business processes and update policies and procedures to maximize efficiencies. He works with organizations large and small to engage stakeholders in meaningful ways and promote change management best practices.

**Project Support:** Corey has provided his assistance in the development and launching of new software systems, which involved maintaining compliance, promoting buy-in and increasing overall utilization, and tracking the success of the project through analysis of the turnout rate of the online system.

### REPRESENTATIVE CLIENTS

- ▶ Adams County, CO
- ▶ City of Bettendorf, IA
- ▶ City of Bloomington, MN
- ▶ City of Danville, VA
- ▶ City of Detroit, MI
- ▶ City of Pasadena, CA
- ▶ Douglas County, NE
- ▶ Hamilton County, IN
- ▶ Mobile County Health Department, AL
- ▶ Outagamie County Department of Health and Human Services, WI
- ▶ Peoria County, IL
- ▶ Village of Downers Grove, IL
- ▶ Yamhill County, OR



## Allisha Ouellette, MBA

Lead Business Analyst |  
Consultant

### EDUCATION AND CERTIFICATIONS

MBA, Thomas College

BS, Legal Studies/Pre-Law,  
Husson University

**Allisha Ouellette** is a consultant with BerryDunn’s Local Government Practice Group. She leverages her eight years of project management and coordination experience to develop high quality deliverables, monthly aggregate reporting, and project management support for state and local government clients. Allisha has provided project management services for clients such as Syracuse City School District, New York, Coachella Valley Association of Governments (CVAG), California, and Washington County, Oregon.

### RELEVANT EXPERIENCE

**Project Coordination:** Allisha brings strong communication, leadership, critical thinking, and analytic skills while overseeing and assisting on multiple selection and implementation projects. Her skills include creating and disseminating project schedules, preparing, and distributing key project documentation, and working cross-functionally to provide quality project management services to clients and vendors.

**Business Analysis:** Allisha provides high quality business analysis services to a mix of large and small-scale clients in local and state government spaces. Not only does Allisha understand small, local governments with limited and competing resources, Allisha also provides deep knowledge of large, complex, specialized clients with complicated scopes of work including Jefferson County Public School District in Colorado, Denton County Transit Authority in Texas, Madison Metropolitan Sewerage District in Wisconsin, and the Massachusetts Executive Office of Energy and Environmental Affairs.

**Business Process Improvement:** Allisha is experienced in assisting with current state (as-is) and future state (to-be) process diagramming and mapping for local government clients amid planning for large-scale enterprise resource planning projects. For clients such as Athens-Clarke County, Georgia and Chicago Metropolitan Agency for Planning Allisha provides multifaceted research and provides effective recommendations across processes, policies, organization, and technological scopes.

### REPRESENTATIVE CLIENTS

- ▶ Athens-Clarke County, GA
- ▶ City of Auburn, WA
- ▶ City of Aventura, FL
- ▶ City of Corona CA
- ▶ City of Irvine, CA
- ▶ City of Kirkwood, MO
- ▶ City of Worcester, MA
- ▶ Coachella Valley Association of Governments (CVAG), CA
- ▶ Douglas County, CO
- ▶ Jefferson County Public Schools, CO
- ▶ Syracuse City School District, NY
- ▶ Washington County, OR
- ▶ Hamilton County, OH





## Jonathan Sullivan, MBA, MA, MURP

*Business Analyst |  
Consultant*

### EDUCATION AND CERTIFICATIONS

MBA, Supply Chain and Service Management, University of Massachusetts Boston

MA, Political Science, Northeastern University

Master of Urban and Regional Planning, Ball State University

BA, Political Science, Indiana University

**Jonathan Sullivan** is a consultant in our Local Government Practice Group and has a strong background in public service experience. He brings experience in urban planning, zoning, stakeholder relations, and digital integration. Further, Jonathan is skilled at documenting project outcomes, communicating, and researching to support consulting projects.

### RELEVANT EXPERIENCE

**Business Process Support:** Jonathan has approximately seven years of experienced focused on providing customer service-like services. Jonathan has led research and analysis efforts for initiatives with Hartford County, Maryland and Yamhill County, Oregon. Further, he has contributed to best practice research, project outcomes documentation, and project meeting logistics coordination.

**System Implementation Support:** In his support role in the Syracuse City School District ERP implementation project, Jonathan helped coordinate and develop end-user training videos to aid in system adoption by school employees.

**Planning and Zoning:** Jonathan brings experience as a zoning specialist for the City of Portland, Maine, conducting zoning reviews and revising land-use codes. In addition, he served as a technical planning intern for the Indiana Department of Transportation, focused on collecting and preparing data for multi-modal planning projects. Other experience includes working with the Indiana Housing and Community Development Authority to facilitate expansion of the Coordinated Entry process and serving as a tester for the Fair Housing Center of Central Indiana.

### REPRESENTATIVE CLIENTS

- ▶ City of San Jose, CA
- ▶ City of Pasadena, CA
- ▶ Fauquier County, VA
- ▶ Hartford County, MD
- ▶ Louisville/Jefferson County Metro Government, KY
- ▶ Syracuse City School District, NY
- ▶ Town of Mountain View, CO
- ▶ Yamhill County, OR



## Ross DeFalle, MBA

*Senior Consultant*

### EDUCATION AND CERTIFICATIONS

MBA, Marketing, Arizona State University

BA, Economics, Lenoir-Rhyne University,

Professional Certificate – Leading Smart Communities

**Ross DeFalle** is a senior consultant in our Local Government Practice Group and has more than three years of IT project management and systems implementation leadership and has over seven years in client relationship building and account management. Ross' experience, including with King George County and Fauquier County, VA includes providing strategic leadership for complex IT strategic plans, cultivating profitable client relationships, and consistently achieving functionality goals.

### RELEVANT EXPERIENCE

**Account Management:** As the IT Project Manager of Enterprise Systems, Ross worked with C-suite executives, community leaders, and key decision-makers within a wide range of client organizations including city governments and housing authorities nationwide. Ross drove substantial year-over-year revenue growth as an IT consultant by fully understanding technical and functional requirements, presenting clients with industry-leading software solutions, and negotiating favorable contracts. Ross maintained outstanding client retention and satisfaction metrics by building mutually beneficial partnerships centered on common goals, providing clients with impeccable follow-through, and improving brand presence.

**Business Process Improvement:** Ross has provided business process improvement services to many BerryDunn clients during enterprise system selection. His experience includes fact-finding, recommendations development, and requirements definition. He draws on experience and industry best practices when assisting clients with business process recommendations.

**IT Strategic Planning:** Ross worked alongside client staff to help understand workflows and align enterprise systems to improve operational performance. He helped ensure projects were completed on time by estimating project duration, costs, and projected return on investment while creating implementation plans to seamlessly facilitate software transitions. Ross acted as a change agent to identify client needs, resolve quality/functionality issues, and present client-side stakeholders with actionable insights for scaling ERP systems with organizational growth. Ross was instrumental in leading multiple concurrent projects by establishing best practices and meticulously tracking scope, milestones, and budgets to achieve objectives.

### REPRESENTATIVE CLIENTS

- ▶ Athens Clark County, GA
- ▶ City of Dover, NH
- ▶ City of Edina, MN
- ▶ City of Frisco, TX
- ▶ City of Nashville, TN
- ▶ City of St. Charles, MO
- ▶ Fauquier County, VA
- ▶ Hartford County, MD
- ▶ King George County, VA
- ▶ Metro Nashville Davidson County Schools, TN
- ▶ New Kent County, VA



**Erin Provazek, MBA,  
Prosci® CCP, CGCIO, ITIL,  
COBIT 2019, PMP®**

*Technical Lead | Senior  
Manager*

**EDUCATION AND  
CERTIFICATIONS**

MBA, Information Technology  
Management, Western Governors  
University, 2015

BBA, Information and Operations  
Management, Texas A&M University,  
2000

Certified Project Management  
Professional® (PMP®)

Information Technology Information  
Library (ITIL) v3 Foundations Certified

Prosci® Certified Change  
Management Practitioner

Certified Government Chief  
Information Officer (CGCIO),  
University of North Carolina Chapel  
Hill

COBIT 2019 Foundation Certified

**Erin Provazek** is a senior manager and experienced information systems executive with six years' experience at BerryDunn and 18 years performing and managing all levels of IT operations and projects in the public sector. Her operational experience includes IT service management design and operation; building technology focused strategic business partnerships; extensive project management; data management; and cost planning and budgeting. Erin has demonstrated skills in guiding clients through complex decision-making processes, considering the resource needs of organizations in delivering IT services.

**RELEVANT EXPERIENCE**

**System Selections and Implementations:** Erin has over 23 years' experience implementing technology solutions, from IT infrastructure to enterprise applications solutions for all local government departments' operations. These implementations include identification of business needs and requirements, selection of solutions based on those business needs, managing the implementation and deployment of the solutions, and preparing the solution for ongoing operational support. Erin's implementation strategies align operational needs with enterprise technology management practices, improving partnerships with technology providers and users within the organization.

**IT Leadership and Business Systems Management:** During her 18 year tenure with the City of College Station, Texas, and as assistant IT director, Erin managed, supervised, set goals and achievements, and performed strategic planning. She also managed the administration, setup, inventory, and integration of enterprise hardware, application servers, and software.

**IT Strategic Planning and Assessments:** Erin has led over 16 IT strategic planning and assessment engagements for BerryDunn's local government clients. Erin excels at helping clients align their technology strategy with organizational operations and needs. She leverages her public-sector IT leadership experience with her knowledge of best practices and IT governance frameworks. Erin believes in the importance of adapting each IT strategic planning process to the unique needs of the client and to conducting extensive stakeholder engagement in order to ensure the plan addresses the needs and perspectives of all who will be impacted.

**REPRESENTATIVE CLIENTS**

- ▶ City of Arlington, TX
- ▶ City of Bettendorf, IA
- ▶ City of Denton, TX
- ▶ City of Detroit, MI
- ▶ City of Galveston, TX
- ▶ City of Grand Prairie, TX
- ▶ City of Jacksonville, NC
- ▶ City of Lakeville, MN
- ▶ City of Tampa, FL



## Kate Offerdahl-Joyce, NIGP-CPP

*Procurement Lead |  
Senior Consultant*

### EDUCATION AND CERTIFICATIONS

BA, History, University of MN –  
Twin Cities

Master's Certificates in  
Government Contracting,  
Commercial Contracting, and  
IT/Information Security Project  
Management, Villanova  
University

National Institute of  
Governmental Purchasing  
Certified Procurement  
Professional (NIGP-CPP)

**Kate Offerdahl-Joyce** is a senior consultant in the Local Government Practice Group who focuses on procurement and contract analysis. They bring more than 15 years of procurement, process improvement, and recommendation implementation experience. With a strong background in project management, Kate has hands-on experience working with a wide array of teams and organizations to improve business processes to be more efficient, user-friendly, and time- and cost-effective. Kate is also a National Institute of Governmental Purchasing Certified Procurement Professional.

### RELEVANT EXPERIENCE

**Government Procurement:** Kate has over 13 years of experience with state and local government procurement. This experience includes RFP writing, vendor evaluation, and response development. They also are well-versed in eProcurement, reporting, and process improvement. While the IT Project Manager for National Association of State Procurement Officials (NASPO) ValuePoint, they worked with many public-sector offices, departments, and organizations, leading the implementation of a national eProcurement software as a service (SaaS) solution, improving business processes, and supporting onboarding and training activities.

**Project Management:** Kate's project management experience is extensive and wide-reaching. They have worked in various capacities, including across departments, with IT and supporting sales and product development. In their project management engagements, Kate has led all aspects of project management, including inception, discovery, planning, implementation, and execution. In all that they do, they seek to identify opportunities to improve, implement effective change, and help ensure successful partnerships.

### REPRESENTATIVE CLIENTS

- ▶ Athens-Clark County, GA
- ▶ Calumet County, WI
- ▶ City of Amarillo, TX
- ▶ City of Auburn, WA
- ▶ City of Aventura, FL
- ▶ City of Cedar Falls, IA
- ▶ City of Corona, CA
- ▶ City of Galveston, TX
- ▶ City of Irvine, CA
- ▶ City of Jacksonville, NC
- ▶ City of Lakeville, MN
- ▶ City of Livermore, CA
- ▶ City of Manassas Park, VA
- ▶ City of San Leandro, CA
- ▶ City of Santa Cruz, CA
- ▶ City of St. Charles, MO
- ▶ City of Tempe, AZ
- ▶ City of Weatherford, TX
- ▶ City of Wilmington, NC
- ▶ Coachella Valley Association of Governments, CA
- ▶ Douglas County, CO
- ▶ Fauquier County, WI
- ▶ Hamilton County, IN
- ▶ Harford County, MD
- ▶ Jefferson Parish, LA
- ▶ McLean County, IL
- ▶ Omaha-Council Bluffs Metropolitan Area Planning Agency, NE
- ▶ Scott County, IA
- ▶ Waukesha County, WI