



SUPERIOR

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Request for Proposal – 2024

Enterprise Resource Planning Software Selection Advisory Services

Bid #24-20-FIN

**Proposal Respectfully Submitted by:
Panorama Government Solutions, LLC**

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Denver, CO 80222

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Cover Letter

Dear Evaluation Committee Members,

We are delighted to submit a response to City of Superior Enterprise Resource Planning Software Selection Advisory Services. Panorama is the leader in independent ERP consulting, providing ERP selection and implementation oversight services. Panorama's strength lies in ERP consulting with proven experience in the public sector, including cities and municipalities. We are completely independent and vendor-agnostic with no ties to any software vendors. Our core services aim to assist organizations in selecting the right ERP system, securing the best contract terms, preparing the organization for a successful implementation, and ultimately providing project management and oversight for your ERP implementation.

Panorama's full focus for nearly 20 years has been ERP selection and implementation advisory services and as such we have the most expertise in this space. Because we are a vendor unaffiliated ERP selection and business transformation firm and not a software vendor, integrator, or an accounting & tax firm, we bring a toolset of proven methodologies, best practices and in-depth vendor knowledge which results in effective contract terms, saving cities millions in unnecessary fees. Being unaffiliated with any software vendor results in an unbiased ERP solution recommendation that focuses entirely on the City's business needs and core requirements.

With over 700 ERP software selections under our belt, including evaluations of many systems, we have extensive experience in working with clients to assess, select, and ultimately modernize their ERP infrastructure, often with seamless integrations with other third-party systems. We focus on instituting best practices, improving efficiencies, and supporting digital processing and workflows. We do this by engaging initially with the client organization's executive leadership to understand the important goals and objectives for the ERP initiative, followed by workshops with the broader team to understand the business needs for the new system. Through this information gathering process, we analyze current business processes, envision improved future state processes, understand the organizational culture and readiness, and evaluate the organization's technology infrastructure. This comprehensive approach will aid the City in conducting a robust selection process for the most suitable software solution to support the ERP digital transformation initiative.

Please do not hesitate to contact Chris Devault at (720) 515-1377 or email him at Chris.Devault@panorama-consulting.com with any questions or additional information.

With Gratitude,

Z. Vanessa Davison
Managing Director

4.1 Company Profile

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Headquartered in Denver, CO. Employees are remote throughout the US & Latin America. Panorama Consulting Group has been in business since 2005. The Company has a little over 30 employees, with roughly half with 10+ years of experience at the company. We have a few franchise offices and over 50 part-time subject matter experts (SMEs). All of Panorama employees are ERP & business transformation consultants, unlike the large tax and accounting firms who do not have 100% of the organization dedicated ERP advisory services.

Our Mission

Panorama's mission in its government service offerings is to bring a high Return on Citizenship (ROC) to our clients' constituents. We define ROC as the amount and quality of services received for taxpayer dollars or utility service fees. In today's economy taxpayers are expecting the government to do more with less. Moreover, the taxpayers are expecting the same quality of service as what they receive from innovative private service providers. With every software recommendation, Panorama keeps the ROC principle in mind. When we think about our customers, we think about serving all constituents from its employees to its communities, so we provide a delivery methodology that is efficient, thorough, and cost effective for many years to come.

Panorama's Services

Panorama pioneered the ERP industry in 2005 by becoming the first independent niche consulting firm focused on the ERP market. Panorama has become a thought leader in Digital Transformation, ERP selection, ERP implementation, organizational change management (OCM) and business process management (BPM). One-hundred percent independent of vendor affiliation, Panorama helps firms evaluate and select ERP software, implement software, and facilitate all related digital transformation, business process optimization / re-engineering and organizational changes to ensure that each of its clients realizes the full benefits of their ERP implementation.

Panorama Government Solutions was founded in 2012 to specifically serve public sector clients all over the world and is the sister company of Panorama Consulting Group, which serves the private

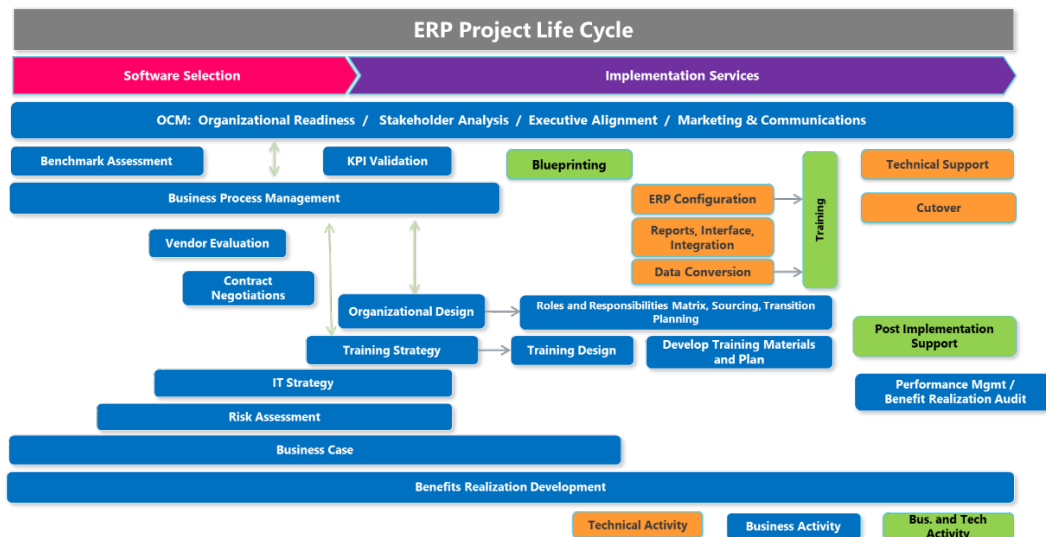
sector. Panorama Government was founded because we saw a 78% ERP implementation failure rate in public sector, confirmed by Gartner in a report first published in 2010. We have focused on helping governments drive this rate down by instituting the best practices we have deployed in our private sector clients that result in a higher success rate. We enable government entities and nonprofits worldwide to achieve economic, social, and operational success through the implementation of best practices and appropriately leveraging technology, specifically Enterprise Solutions that enable business success. Standardized methodologies are consistently used by all of Panorama’s global resources to effectively deliver our business and digital consulting services.

Panorama’s leadership and consultants have performed numerous engagements for public sector firms domestically and internationally. Our experience with cities, counties, states, agencies, utilities, water districts, tribes, investment boards and international governments has given us a breadth of experience that allows our clients to benefit from best practices in the broad public sector. Furthermore, our extensive experience in the private sector allows us to bring a unique perspective of innovation and efficiency to the public sector to help our public sector clients be on par with the private sector. You will be able to see the breadth of client experience by visiting our website at www.panorama-consulting.com/company/our-clients/. You can also see our dedicated government page www.panorama-consulting.com/government-solutions and our client success stories at www.panorama-consulting.com/company/client-success-stories/.

PANORAMA’S SERVICES:

- | | | |
|--|---------------------------------|------------------------------------|
| ERP Selection | ERP Implementation (PMO) | ERP Contract Negotiation |
| ERP University/Training | ERP/IT/Digital Strategy | ERP/Technology Assessment |
| OCM | Human Capital Management | Business Process Management |
| Project Auditing & IV&V | Project Recovery | Software Expert Witness |
| Business Transformation | Digital Transformation | Data Strategy |

We are a Full Cycle ERP Consulting Firm:



Panorama can continue to provide business process management, organizational change management, training, and project management services during implementation in coordination with City of Superior and their chosen integrators.

Affiliations and Relationships. Panorama entered the ERP industry in 2005 by becoming the first independent, niche consulting firm focused on the ERP market. We are 100% technology independent. 100% independent of enterprise resource planning ERP software vendor affiliation, Panorama offers a phased and integrated approach to strategy alignment and execution, enabling each client to achieve their unique vision. Some firms confuse clients by proclaiming that they are “solution agnostic” but when they state they have vendor partnerships and alliances, it means that they will receive financial consideration for selling their solution. This means that the consulting firm is incited to steer its selection clients to those solutions they directly financially benefit from. Panorama purposefully does not have such partnerships and alliances to truly provide its clients with unbiased advice and present the best possible ERP solution. We have included our Affidavit and Pledge of Independence in the Certification of Independence section of this proposal.

We offer the flexibility of either a top-down strategic approach, or a bottom-up tactical approach to our clients’ projects, depending on each client’s unique business transformation objectives. Since we do not receive compensation from any software vendor or system integrator, we can provide complete objective analysis that is not influenced by special interests.

Although we have no financial relationships with any supplier, we do maintain arms-length relationships with many ERP vendors to understand their capabilities, strengths, and roadmaps. We use this information to guide decisions on which vendors to consider in any given client project. Some of the software vendors we have worked with include the logos below.

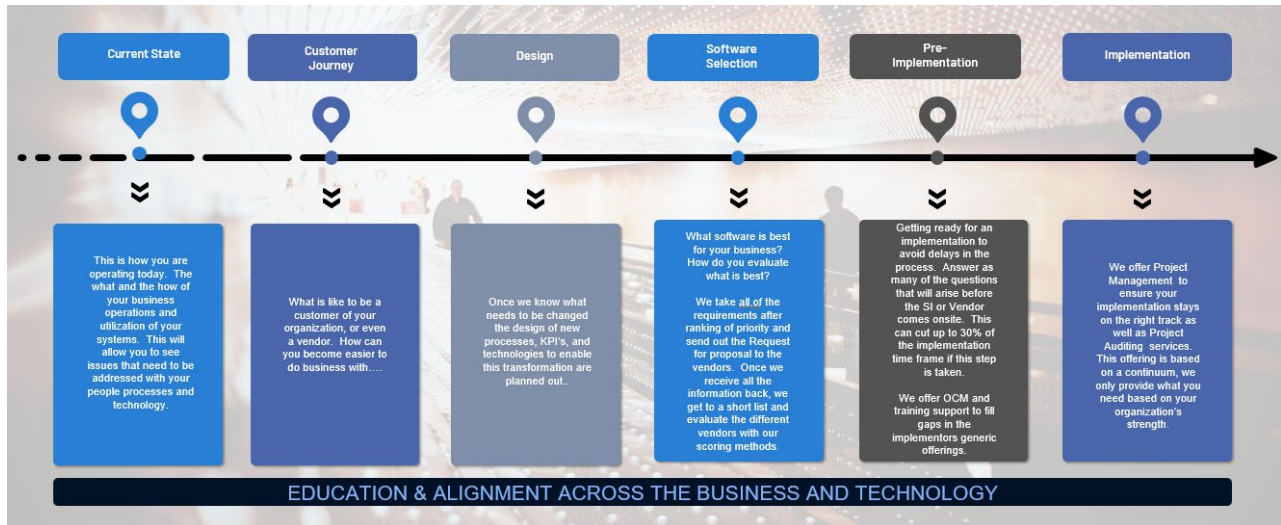
SOME OF THE 150+ DIFFERENT Business Management
SOFTWARE PACKAGES WE HAVE EVALUATED FOR OUR CLIENTS



Our Differentiator

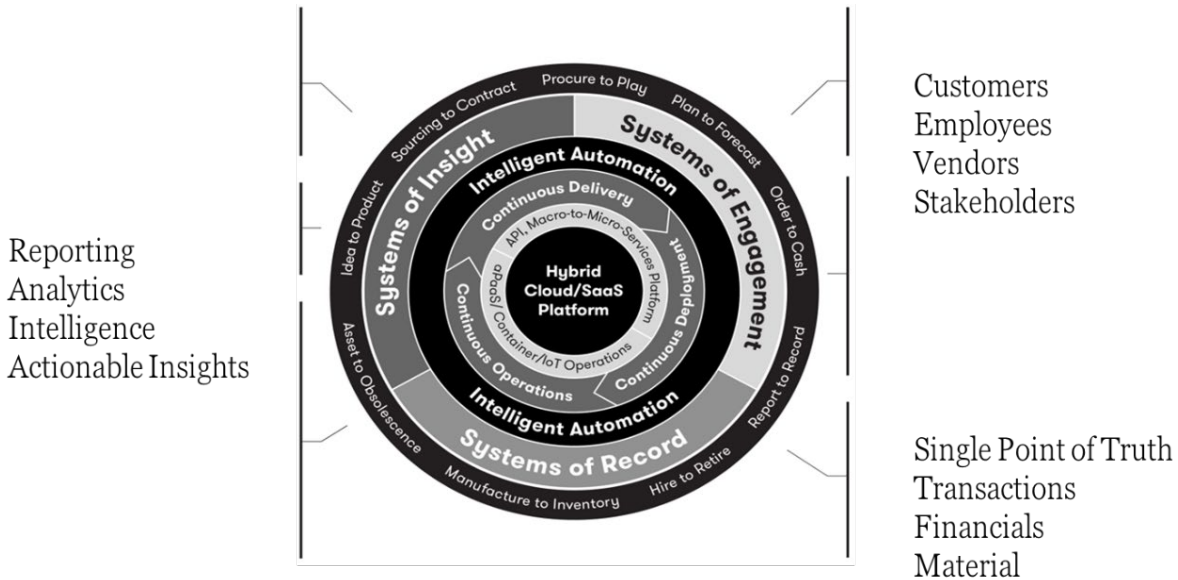
Panorama Philosophy

The goal of our public sector ERP services is to help you succeed in your mission to serve City of Superior's community. While our recommendations differ based on the needs of each client, this fundamental principle will never be compromised. We help you achieve optimal performance while controlling costs, increasing communication, and creating value for every affected employee and citizen. Our approach is based on best practices from both the public and private sectors. We also leverage proprietary, fully compliant methodologies based on best practice.



The reason why our clients' projects are a success is because we not only focus on the ERP system, which is never the driving factor, but rather the enabler for efficient business processes and empowerment for your people to do more with less.

We look at the big picture. We do not look at just one aspect of a digital transformation or ERP initiative. Instead, we examine all the key components required, including the people, process, and technology. This includes business process definition, optimization and re-engineering, business case justification, hardware and infrastructure assessment, organizational readiness, and the software solution design and implementation. For those organizations seeking and ready to adopt digital tools such as AI, IoT and RPA, we work with you to get your data and teams ready so that you can implement your digital transformation.



We gain a thorough understanding of our clients' unique organizational requirements. While our consultants provide best practices, proprietary tools, and methodologies, we also take the time to understand our clients' unique requirements and culture to avoid a boilerplate approach. We look to achieve a balance between best practice and the unique way organizations operate to provide the guidance for an ERP solution that will minimize customizations, improve user adoption, and provide an optimal total cost of ownership (TCO).

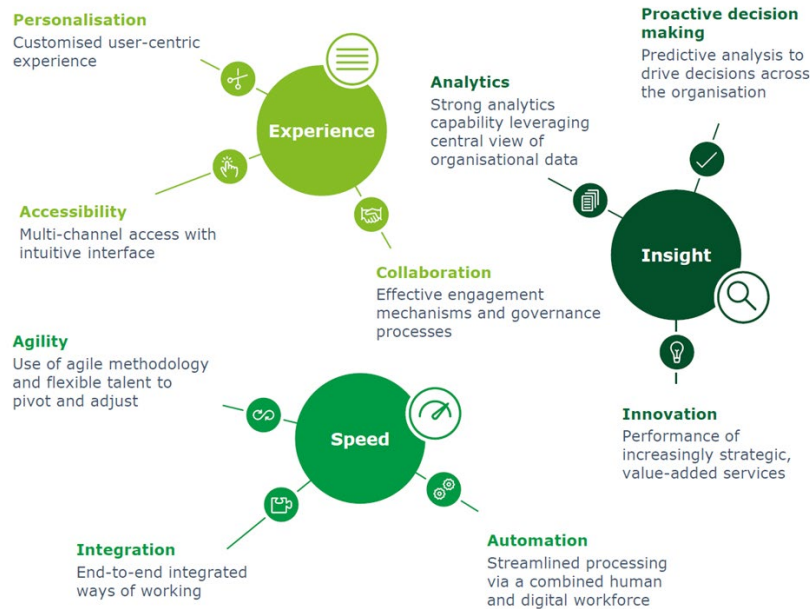
We leverage proven proprietary tools and methodologies. Panorama has developed and tested a variety of tools and methodologies to help our clients perform their ERP projects faster, more effectively and at a lower cost. Our vendor database has data from almost 20 years of ERP initiatives and research. Internally, we have an entire team dedicated to ensuring our methodologies are innovative and evolving with the fast-changing ERP industry. Our tools and methodologies undergo continuous improvement to give our clients the most effective and up-to-date services. You will see from our resumes and client case studies that our team's very fiber is rooted in helping governments and organizations succeed.

We have a well-rounded team of consultants. Panorama has a team of highly qualified and specialized consultants. Our team holds advanced degrees in Organizational OCM, Information Systems, Business Management, Data, Education and Training Management Technology, and Master of Business Administration. Many of our team members are also Certified PMPs, LEAN Six Sigma Belts and Prosci ADKAR® certified. One of the key differentiating factors with our team is that they are not only seasoned industry veterans but have tenure at Panorama. We do not put inexperienced consultants on your project. We pride ourselves on low attrition employee rates and our strong culture translates to improved client success.

We use a team-based collaborative approach. Many consulting firms take a piecemeal approach to ERP projects and do not act as a cohesive team with tools and resources to support them. Conversely, we take a team-based approach. The Panorama team works closely with our clients' ERP evaluation teams throughout the project. This approach enables our team to implement best practices and lessons learned to our clients. Our philosophy is that several people on an evaluation will provide more experience and perspectives than one person, which ultimately leads to a higher quality output than what traditional consulting approaches can bring.

Top 7 ERP Critical Success Factors
1. Focus on Business Processes and Requirements
2. Focus on Performance Metrics and Return on Investment
3. Strong Project Management
4. Staffing of Project with "A-Team" Resources (Internal and External)
5. Strong Commitment from Management and Executives
6. Careful Project Planning
7. Strong Training and Change Management

Panorama embraces the people, process, technology & data (PPTD) framework to help our clients improve the operational efficiency of their organizations. The PPTD framework is all about how the four elements interact. The people do the work. Processes make this work more efficient. Data is leveraged to provide information and implement predictive & prescriptive analytics. Technology helps people do their tasks and helps automate the processes. Thus, our clients can achieve organizational efficiency by balancing and optimizing the relationship between the four elements of the framework.



Panorama helps you evolve. We believe that with our methodology, we will be able to clearly identify, write and analyze your business and functional requirements, and review different technologies available, such as RPA & AI depending on your cultural appetite for the next evolution of systems.



What makes Panorama unique is that our approach considers the three most important innovations in the evolution of systems over the last few years:

- The transformation of systems from transactional backbone to data-driven decision support systems.
- The emergence of the digital experience as a means of optimizing stakeholder experience.
- The transformation and improvement of business processes through better data and the digital experience.

Our objective is to help organizations use information to make better enterprise decisions by helping organizations document their objectives, determine the best method to measure them, help them select the right tools to collect the data, and provide the analytics that create actionable insight. Given the correct information, systems can help organizations understand their constituents' needs, combat fraud and error in the systems, manage costs, optimize services, manage infrastructure, and improve operations.

Panorama believes one of the most overlooked benefits of providing digital access to stakeholders is the long-term cost savings that can be realized by replacing older, manual, and physical infrastructure.

Improving the effectiveness of services using digitalization requires end-to-end integration of cross-departmental processes. **We understand it is important to view process redesign from the customer's overall perspective rather than the perspective of any individual department.** In the past, many public sector processes have failed due to requiring numerous handovers within the organization. Different department-specific processes also result in the same information being requested multiple times and in different formats. One of the objectives of an efficient process should be to "ask once" for basic information.

As organizations increasingly digitize services, Panorama believes it is critical to establish comprehensive data and technology guidance from the onset based on three pillars:

Open data platforms: Data-exchange platforms supported by common data standards establish common underpinnings for seamlessly building and delivering services to the public. This requires departments to synchronize how to aggregate and standardize the data for consumption. This increases innovation in the public and private sectors, as it enables them to use the data to offer new products and services while benefiting customers or citizens. As an example, going paperless allows organizations to take advantage of the many benefits that result from a digital platform: increased savings, greater efficiency, a smaller carbon footprint, and more agility in delivering services.

Open technology platforms: Building and enabling common technology infrastructure provides organizations the ability to design, test, pilot and launch services in a scalable, secure fashion. Mandating common approaches results in savings across the spectrum. These common approaches benefit stakeholders by enabling service-oriented technology architectures that facilitate discovery, publication, and consumption of services not only by individual departments, but also across departments and authorized external participants.

Effective cybersecurity solutions that can scale to meet the requirements of organizations: Organizations can take advantage of these cybersecurity technologies together with expertise and skilled resources that manage them when deploying a cloud solution from a proven provider. This helps organizations strike the appropriate balance between security and end-user empowerment, with effective security controls across identity, device, data, apps, and infrastructure. Finally, it is imperative to establish a cybersecurity framework in governance, strategy, and policy.

Industry Recognition & Awards

Panorama team has built a reputation as a trusted provider of independent ERP analysis, advice and ERP thought leadership. Our work and expert opinions have been cited by journalists and bloggers around the world and reported on in numerous online and print publications, including The Wall Street Journal, The Financial Times, CIO Magazine, Forbes, and the Denver Business Journal. For a complete list (too many to name here), you can visit our website <https://www.panorama-consulting.com/company/panorama-publications/>.

Over the years, Panorama has participated in and provided speakers for various prestigious technology conferences including SAP Insider events, Inform (Infor), IFS conferences, Syteline symposiums, Precision Metalforming Association events, international government conferences such as Presidencia de Consejo de Ministros (ONGEI) in Peru, International Perspectives – PD Week in Canada, LEHRN HR tech expos, to name a few.

Panorama was featured in The Technology Headlines publication in 2019 as one of the 10 Fastest Growing Digital Technology Solutions Providers. As highlighted in the publication's Spotlight of the Month, we were recognized for constantly differentiating in order to stay ahead of our competition. This especially holds true today as businesses adapt to new and changing work environments. We were also awarded the 2015 Bronze Award for our 360° ERP Blog by ERP Focus (Converted Media.)

Finally, Vanessa Davison, Managing Director, was selected by Colorado's Governor's Office of Strategic Planning to serve on the Government Strategic Committee to serve as a subject matter expert in technology innovation in the public sector.

Certification of Independence

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P A N O R A M A
CONSULTING GROUP

April 4, 2023

Re: Panorama Government Solutions, LLC certification of independence from third-party software vendors and value-added resellers ("VARs")

To Whom It May Concern:

This letter certifies that Panorama Government Solutions, LLC, its affiliates, officers, directors, owners and employees are not in any way affiliated with third-party software vendors or VARs. We do not sell software. We are 100% independent from software vendors and VARs, and we do not receive a commission, kickback or any other form of compensation from software vendors or VARs when we guide our clients through the software selection decision process, or otherwise.

Respectfully,

Alan Salton, Managing Director

DocuSigned by:

Signature
Alan Salton
Printed Name
Managing Director
Title
4/4/2023
Date

Calvin Hamler, Managing Director

DocuSigned by:

Signature
calvin hamler
Printed Name
Managing Director
Title
4/4/2023
Date

Vanessa Davison, Managing Director

DocuSigned by:

Signature
Vanessa Davison
Printed Name
Managing Director
Title
4/4/2023
Date

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4.2 Key Personnel

Experienced Team Members

All of Panorama's proposed teams have been with Panorama for more than 7 years and are veterans in the industry, including municipalities and other public sector agencies. Because our sole focus is in ERP Selections & implementations, all of our resources have experience with the methodology and approach set forth in this RFP. Panorama has a team-based approach bringing in experts throughout the process. We do not propose any inexperienced personnel without any direct and relevant experience like some of the larger firms. Unlike accounting and tax firms, our team does not just have financial background but also familiar with core ERP functional areas. We also do not propose utilizing any subcontractors. This team has the ability to meet the project workload within the timelines established.

Over the last several years, Panorama Government Solutions has conducted several of its engagements at organizations located within Wisconsin. Some of the more recent ones include American Foods Group, Green Bay Packaging, Belmark, Potawatomi Ventures and the State of Wisconsin Investment Board, all of which have extensive operations within the State. These engagements required our consultants to conduct several detailed business requirement sessions with the firm's personnel to understand the State's legal/compliance requirements as well as the business processes and practices these firms undertake to perform their operations within Wisconsin.

These engagements were performed over several months (and years) and required our consultants to spend a considerable amount of time working at their company locations within Wisconsin. This has given Panorama a solid understanding of what it takes to do business in Wisconsin as well as the culture, values and strong work ethic of its citizens.

Panorama Consulting Group's Project Management provides effective and efficient communications with our clients' project teams and executive sponsors. Routine, bi-weekly status updates and reports provide transparent discussions on project updates, challenges and concerns. Escalation paths are clearly defined during project initiation. Strong communication fosters an environment to maximize project efficacy while minimizing risk and misunderstandings.

Team Biographies



Vanessa Davison – Managing Director

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Vanessa.Davison@panorama-consulting.com

Office: 720-515-1377

- **Designations:** Certified Six Sigma Black Belt, Certified Mortgage Banker (CMB)
- **Education:** BA/BS in Rhetoric & Legal Studies with minors in Computer Science & Spanish Literature from *University of California at Berkeley*; Executive Management Program, Strategy Coursework at *Harvard Business School*; Graduate School of Political Management Summer Scholars Program at *George Washington University*

- **Bio:** Vanessa specializes in government ERP strategy, digital transformation initiatives and government policy. She has served as an advisor to heads of states to implement policy that allows for effective management of funds for major infrastructure initiatives, such as technology improvements. She enables the public sector to meet the demand for digital government, organizational performance, and increased citizen interaction necessary to compete in today’s global economy and provide superior service to their citizens. She serves on the State of Colorado’s Government Tech Committee and helped Peru’s Ministry of Finance establish ONGE (National Office of Electronic Government) to have fair and effective IT procurement.

- **Panorama Summary (2012 – Present):** She founded Panorama Government Solutions to bring a more integrated approach to government services to maximize what she calls ROC – Return on Citizenship. She leveraged best practices in the private sector to improve government entities with the same innovation. With a focus on providing maximum value to constituents, she built our delivery model to provide an effective e-government to enable citizen engagement. Under her leadership, Panorama has worked with cities, counties, states, water and investment boards, tribal governments, and international governments in order to implement the right ERP solution and achieve transformative value. Vanessa leads our government delivery team in assisting organizations going through digital business transformation initiatives, which involve ERP software selection and implementation, project recovery, IV&V, contract negotiation, business strategy, capability-building and organizational design, enterprise strategy, OCM and business process management. Panorama’s philosophy is about bringing together the People, the Processes and the Technology in order to provide breakthrough value.

- **Areas of Expertise:**

Government Digital Strategy
Government Finance and Budgeting Management
Operational Effectiveness Management
Government Governance

Process Analysis and Improvement
Business Process Management (BPM)
Public Policy and Management
Organizational Development

- **Government Experience & Similar Engagements:**

State of Wisconsin Investment Board
City of Fort Lauderdale, FL
West Basin Municipal Water District
Financial Management Institute of Canada (FMI)
City of Sunrise, FL
New York State, Office of Storm Recovery
Nevada Irrigation District
City of Bend, OR
City of Fort Smith, AR
Kern County, CA

City of Charlotte, NC
City of Pembroke Pines, FL
Cook County, IL
Government of Peru, ONGEI
State of Maine
San Jacinto River Authority
State of Colorado
City of Cedar Park, TX
City of Greeley, CO
Town of Apex, NC



Rich Goluskin – Director of Client Services
2000 S Colorado Blvd. Tower 1, Suite 2000-407, Denver, CO 80222
Richard.Goluskin@panorama-consulting.com
Office: 720-515-1377

- **Designations:** Certified Six Sigma Black Belt
- **Education:** MS and BS, Management Engineering, *Rensselaer Polytechnic Institute*

- **Bio:** Rich is an expert leader of technology initiatives, with a strong focus on the implementation of systems and best practices. He has led, managed, and worked on many projects throughout the Americas, with extensive experience in technology-based strategy, design, and implementation engagements while working for global consulting, software, and technology organizations. Rich has also led projects for government agencies in Mexico and Brazil. Rich has led technology services organizations in the United States and throughout the Americas, including the services arms of various software companies. Rich started his career at Andersen Consulting (now Accenture), contributing to and managing engagements for clients such as the State of New York, IBM, Nabisco, Liz Claiborne, and Praxair.
- **Panorama Summary (2016 – Present):** As an integral member of the senior leadership at Panorama, Rich provides guidance and structure to the client services delivery team. In addition to driving continuous improvement of Panorama’s methodologies, Rich oversees projects selecting and implementing various ERP solutions for clients across both the public sector and private industry. **Rich served as a director for many cities and municipalities.** He is currently leading ERP Selection projects for the City of Rio Rancho, Port Gamble S’Klallam Tribe, Town of Apex and San Joaquin Valley Air Pollution Control District, who combined have all functional areas that Metro has in scope.
- **Areas of Expertise:**

Government ERP Selection	Government ERP Implementation
IT Strategy	Project Leadership
Project Management & PMO	Requirements Gathering & Analysis
Business Process Management	Vendor Negotiations
Government Business Functions: Supply Chain, Finance & Accounting, Services, Production, Human Resources	
- **Government Experience & Similar Engagements:**

City of Pembroke Pines, FL	SAT (Mexican IRS)
SABESP (State-owned water provider in Brazil)	Nucor Steel
Correios do Brazil (Brazilian post office)	State of New York
Nevada Irrigation District	City of Fort Lauderdale, FL
Seminole Tribe of Florida	San Jacinto River Authority
The Water Research Foundation	West Basin Municipal Water District
San Joaquin Valley Air Pollution Control District	Arkansas Electric Cooperative
Basin Electric Power Cooperative	Town of Apex, NC
City of Rio Rancho, NM	Port Gamble S’Klallam Tribe



Steve Ditty – Senior Manager/Project Manager
2000 S Colorado Blvd. Tower 1, Suite 2000-407, Denver, CO 80222
Steve.Ditty@panorama-consulting.com
Office: 720-515-1377

- **Designations:** Project Management Professional (PMP)
- **Education:** BS, Management Information Systems

- **Bio:** Steve has over 27 years of consulting experience specializing in managing global ERP software selections (specifically HRIS/HCM), IT implementations and outsourcing engagements for Fortune 500 firms and government organizations. He has played executive-level roles at Accenture, IBM, Deloitte, and Northgate Arinso (NGA) leading government engagements. His consulting roles have ranged from business analyst to program executive where he has led large teams in ERP vendor selection, IT and systems strategy, software implementation, vendor negotiations, project recovery and independent verification and validation engagements to ensure successful ERP software initiatives.
- **Panorama Summary (2016 – Present):** Senior member of the Panorama Client Services Consulting and Expert Witness Team, providing IT project management of strategic accounts and performing expert reporting, rebuttal, deposition and testimonial services for ERP implementation projects and activities. Leads clients through the selection and implementation processes, enabling operational efficiencies and expected return on investment. Applies proven methodologies that provide input to leadership proven to minimize risk, accelerate implementation and increase value of the project to agencies and citizens. Because of Steve’s extensive experience with project recovery, post-implementation reviews and expert witness engagements, he brings a wealth of knowledge on best practices for effective ERP selections and implementations. **Steve will serve as the Lead Project Manager for City of Superior.**
- **Areas of Expertise:**

ERP Assessment	ERP Implementations
ERP Software Selection	Human Capital Management (HCM)
Vendor Negotiations	HRMS Implementation
Business Process Management	Project Recovery & Expert Witness
Independent Verification & Validation	After Action Review/Project Recovery
Program Management	Expert Witness
Government Business Functions: Supply Chain, Finance & Accounting, Services, Production, Human Resources	
- **Experience & Similar Engagements:**

City of Pembroke Pines, FL	State of Maine
State of New York	State of Maryland
City of Fort Lauderdale, FL	State of Texas
State of California	Manatee School District (FL)
Seminole Tribe of Florida	San Jacinto River Authority
West Basin Municipal Water District	Town of Apex, NC
City of Rio Rancho, NM	San Joaquin Valley Air Pollution Control District
Port Gamble S’Klallam Tribe	Camden School District



Chris Devault – Senior Manager of ERP Vendor Relations
2000 S Colorado Blvd, Tower 1, Suite 2000-407 Denver, CO 80222

Chris.Devault@Panorama-Consulting.com

Office : 720-515-1377

Designations: Certified Supply Chain Analyst (APICS Northern Colorado).

Education: Bachelor of Arts in Economics, *Colorado State University*

Bio: Chris has more than a decade of experience in ERP selection, vendor

negotiation, process improvement, supply chain optimization and implementation. He has also managed cross-functional teams and coordinated relationships with multiple enterprise software vendors. Chris' achievements in the ERP project lifecycle are born from strong analytical problem solving, organizational skills and an ability to develop and lead productive teams. He has been on both sides of software acquisitions and implementations as a sales manager and consultant. With more than 16 years of experience as a subject matter expert in ERP projects, Chris brings all the necessary skills for a successful ERP selection and negotiation. Chris has evaluated multiple transitions from premise-based solutions to cloud based as well as hybrid solutions. With vast experience in the vendor market, Chris has worked with many organizations to upgrade, integrate, and replace ERP solutions.

Panorama Summary (2012 – Present): Chris leads our ERP Vendor team that manages all aspects of ERP vendor relations. Chris works with clients across the ERP selection lifecycle and manages all vendor relationships through the process of long list creation, RFI creation and scoring, short list determination, RFP creation and evaluation, software demonstrations and vendor negotiations. Chris has extensive Software experience, including knowledge of product functionality and related service/implementation costs for public and private sector solutions. His vendor relations team keeps abreast of ERP software trends which allows Panorama to stay ahead of the industry and also in charge of the industry reports that Panorama publishes. ***Most importantly, Chris has served as the lead with multiple ERP vendor selections and negotiations with many municipalities, saving them money and unnecessary licenses. Specifically, with City of Sunrise, he saved them \$500K in implementation and maintenance fees.***

Areas of Expertise:

ERP Assessment & Strategy
ERP Software Selection
RFI/ RFP Analysis, Creation and Management
Vendor Demonstration Management
Requirements Gathering, Writing & Analysis

ERP Implementations
Evaluation of Vendor Proposals
ERP Vendor Negotiations
IT Strategy & Assessment
ERP Vendor SME

Experience and Similar Engagements

City of Pembroke Pines, FL
MOPS International, Inc.
Alaska Tribal Health Consortium
Quebec Automobile Insurance Society
US Soybean Export Council
The White Earth Band of Ojibwe
Denver Art Museum
San Joaquin Valley Air Pollution Control District

Village of Mundelein, IL
National Radio Astronomy Observatory
City of Charlotte, NC
City of Sun Rise, FL
Larimer Humane Society
State of Wisconsin Investment Board
City of Rio Rancho, NM
State of New York



Darlene Stromberger – Senior Consultant

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Darlene.Stromberger@panorama-consulting.com

Office: 720-515-1377

- **Designations:** Lean Six Sigma Black Belt, Prosci OCM
- **Education:** BS Accounting / Business Administration, MS Organizational Leadership / Project Management

- **Bio:** Darlene specializes in assisting governments with ERP software selections. She has worked in various consulting roles assisting public sector agencies and has also worked at a municipality (Town of Windsor) where she brought a deep understanding of city and municipal government operations. She is a goal driven OCM and continuous improvement professional who applies ADKAR and Lean Six Sigma methodologies to deliver tangible results. Darlene has been involved in many government projects, including ERP software selections, IV&V reviews, and project recoveries. She has experience with government ERP core business functions, such as budgeting, fund management, accounting, payroll, time and attendance, leave administration, procurement, grant administration, fixed asset management, construction and project management, human resources, benefits administration, permitting/planning management, and risk management.
- **Panorama Summary (2015 – Present):** Darlene leverages her experience and background in recommending and implementing business and ERP solutions for public and private sector clients. She is adept at quickly understanding client needs and objectives and determining required organizational OCM, business process reengineering, and systems initiatives. Her expertise has allowed her to effectively assess current systems and processes for efficient identification of requirements and design of processes to achieve the highest ROI and user acceptance. Recently, Darlene participated in the requirement sessions, RFP analysis and creation and preparing vendor scripts and demonstrations for 3 of the references named below while working with Rich, Steve and Chris
- **Areas of Expertise:**

Government ERP Software Audit & Selections	Process Analysis and Improvement
Stakeholder Assessments	Readiness Evaluations
Workforce Transition	Skills Assessment and Training
RFP Creation and Analysis	Process Management (BPM)
Organizational OCM	TCO Analysis
Requirements Gathering Writing & Analysis	Demonstration Scripts
Current and Future State Process Flows	Demonstration Management
- **Government Experience & Similar Engagements:**

City of Pembroke Pines, FL	White Earth Ojibwe Tribe
The Water Research Foundation	City of Alexandria, LA
City of Gresham, OR	State of New York
City of Bend, OR	City of Charlotte, NC
San Jacinto River Authority	City of Greeley, CO
Nevada Irrigation District	State of Maine
City of Fort Lauderdale, FL	West Basin Municipal Water District
San Joaquin Valley Air Pollution Control District	City of Rio Rancho, NM

4.3 Related Experience

We have a vast amount of experience with municipalities.

Some of our Public Sector Clients



The below case studies were selected due to the size of the municipalities, complexity, and functional areas in scope. Two of the below projects are in flight.

Town of Apex, North Carolina



Apex, North Carolina is a town in Wake County, North Carolina, a suburb of Raleigh. It is the 3rd largest town in Wake County and has topped the 'best places' lists as the #1 Best Small Town in NC and the #1 Best Place to Live in America. Apex is known as The Peak of Good Living with a population of about 60,000 residents.

Town of Apex Council goals include a High Performing Government, Environmental Leadership and Responsible Development, Economic Vitality, Safe Community and Reliable Infrastructure along with a Healthy and Engaged Community.

Town of Apex contracted Panorama to assist in the replacement of its existing system with a proven, off-the-shelf (COTS) enterprise resource planning (ERP) system. Town of Apex utilized several software solutions and systems. Town of Apex evaluated whether a comprehensive solution that offers a single fully integrated system will meet their needs or a combination of best-of-breed solutions that could be integrated is a better fit.

The Town's systems targeted for replacement are New World (Planning, Permits and Inspections, Human Resources, Finance and Accounting plus Payroll), IDT Plans (Electronic plans review), EPermits (on-line permit applications), City Works (work order management), Cornerstone HR (Applicant Tracking, Recruitment, Performance Management, Training), Executime (Time

reporting), ESuites (Benefits and Enrollment for staff), ESuites (Customer Online Portal for Utilities and online payments), Laserfiche (Document Management, workflows and online form integrations)

Approximately 325 key requirements were identified across areas that included Finance, Human Resources, Supply Chain Management, Utility Billing, Work Order Management, Planning & Project Management, Permitting & Inspections.

Panorama worked with the Town of Apex on preparing the RFP, assisted in releasing the RFP and received 9 vendor proposals. Panorama and The Town jointly selected three short-listed vendors to participate in further consideration. Those three vendors completed a rigorous RFP process which consisted of functional requirements, total cost of ownership, and technical fit.

The three vendors presented demonstrations via customized scripts developed by Panorama specifically for The Town. Vendor demonstrations were completed in April 2022. They then scored the demonstrations using an online survey tool.

We also assisted the town in assessing its Citizen Engagement Platform (CEP). This project allowed us to go deeper into their core business processes and create customer journeys to improve the engagement with their residents in multiple systems. The Panorama team is currently engaged in the CRM and Infor implementation oversight, business process improvement execution and OCM program deployment including training and communication strategies. The implementation is set to start this month.

Functional Areas: Full ERP Functionality for Finance & Accounting, Utility Billing, Procurement & Contracts, City Clerk, Building & Maintenance, Community Services, Public Service, Human Resources & Payroll, Planning & Economic Development.

ERP Selected: Infor

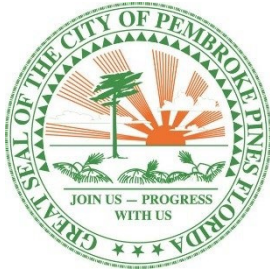
Project Size: \$801,000

Project Team: Rich Goluskin, Steve Ditty & Darlene Stromberger

Date: 05/26/2021 - Present

Contact: Erika Sacco, Information Technology Director - Erika.Sacco@apexnc.org. (919) 249-3312.

City of Pembroke Pines, Florida



Panorama was engaged by the City of Pembroke Pines to select and assist in the implementation of new ERP and related systems. Framed as an initiative to bring a high Return on Citizenship (ROC) – the amount and quality of services received for taxpayer dollars – to the City’s constituents, the project’s goal was to provide a platform to provide the same (or better) quality services to its citizens as what they receive from many private-sector providers.

The City of Pembroke Pines operations are unusual in comparison to other cities. Several areas function like a business rather than a government entity. Pembroke Pines runs 14 diverse departments with the assistance of private entities, and it was not a foregone conclusion that a government-focused ERP was the right fit for the organization. As a result, Panorama determined the City’s business requirements across each organizational area. In addition to all the departments and functions typical of many municipalities, we examined and identified requirements in areas as diverse as utility billing and SIS, or student information systems (the City also operates some charter schools).

Panorama led the process to document the City’s current business processes, pain points, and requirements. Approximately 1,800 key requirements were identified across areas that included Finance & Accounting, Utility Billing, Procurement & Contracts, City Clerk, Building & Maintenance, Community Services, Public Service, Human Resources & Payroll, Planning & Economic Development and Schools. As a result of these assessments Panorama presented a long list of ten software vendors for consideration, all of whom received an RFQ. This provided Pembroke Pines the ability to compare various solutions through a broad set of vendors offering several software options.

After an initial evaluation, Pembroke, with Panorama’s guidance following all City procurement policies, selected eight vendors and issued an RFP to each, which included functional requirements and requested total cost of ownership and technical fit information.

Given the nature of the City’s needs, we divided the selection process into two separate but related streams: one for the ERP solution, and another for SIS. Based on RFP responses, three vendors were selected to present customized demonstrations for ERP and two presented for SIS. The demonstrations were scored using an online survey tool. Vendors were asked to provide follow-up information as required.

The ERP and SIS solutions have been selected and successfully negotiated, and the City Commission approved the purchase. Panorama assisted the City in implementing the ERP in a project oversight capacity, ensuring the selected vendor meets its obligations and delivers the solution as contracted. Panorama anticipates carrying out a similar role once SIS implementation begins next year.

Functional Areas: - Full ERP Functionality for Finance & Accounting, Utility Billing, Procurement & Contracts, City Clerk, Building & Maintenance, Community Services, Public Service, Human Resources & Payroll, Planning & Economic Development

ERP Selected: Tyler Technologies

Project Size: \$789,000

Project Team: Rich Goluskin, Steve Ditty, Chris Devault, Darlene Stromberger

Date: 4/15/2017 – 1/30/2022

Contact: Matthew Kefford, Director of Technology Services Department

mkefford@ppines.com (954) 392-2061

The Seminole Tribe of Florida



The Seminole Tribe of Florida (STOF) is a federally recognized Native American Tribe and sovereign Tribal Government, dedicated to providing high quality care and services to its members who reside on reservations throughout South Florida; Hollywood, Big Cypress, Brighton, Fort Pierce, Immokalee, Tampa and two satellite offices located in Naples and Miami (Trail). With their headquarters based in Hollywood, Florida, the Seminole Tribe of Florida has approximately 2,000 employees spread throughout their Reservations.

The Tribe provides various governmental services to its members and residents of its reservations similar to those services provided at the municipal or county level. Examples of such services include, but are not limited to, public works, recreation and elder services programs, police, fire, and EMS services. The Tribe also maintains health and dental clinics, an education program, preschools and schools, a museum, two rodeo arenas, etc. In addition to governmental services, the Tribe and Tribe, Inc. also are engaged in various business activities including real estate, agriculture, tourism, manufacturing, gas station/convenience stores and sales.

The Tribe hired Panorama March 2019 to assist in selecting software to support its Health Service functions. This software would replace the Tribe's current health systems.

Before engaging Panorama, the Tribe was experiencing several pain points, most of which came down to one of the following root causes:

- Process constraints
- System constraints and/or flaws
- Lack of system integration
- Insufficient user training

Panorama led the process to document business and technical requirements, reviewed legacy systems, mapped processes, and identified pain points across the Tribe's Health Department. At

the conclusion of this phase, we developed an application roadmap recommending which systems to replace and in what order.

Some of these recommendations included:

- The Tribal Registry System is an important database for collecting and storing member registration information and should not be replaced. An automated interface should be built. from this system into the EHR system to reduce multiple data entry requirements.
- The existing health systems should be replaced with one integrated system to track and maintain EHR/EDR/Behavioral Health patient information.

Approximately 181 key requirements were identified across areas that included Clinic Operations (Medical), Clinic Operations (Dental), Pharmacy Operations, Health Plan Administration, Integrative Health, Case Management & Social Services, Health Information Management, and Behavioral Health Services.

Together STOF and Panorama created the RFP which consisted of functional requirements, total cost of ownership, and technical fit. Six vendor responses were received. Panorama did the RFP analysis of the six proposals received scoring degree of fit based on each of the requirements and cost estimate comparison. Panorama and STOF jointly selected three short-listed vendors to participate in further consideration.

The three vendors presented demonstrations via customized scripts developed by Panorama specifically for STOF. Vendor demonstrations were completed in August 2020. They then scored the demonstrations using an online survey tool. The Tribe reached a decision on the best system for their needs: NextGen Healthcare. The Tribe achieved integration of the functional areas that were included in the project scope:

Because of the great results of the project and cultural fit, STOF engaged Panorama again in February 2022 to assist with the selection of a Financial Management system that includes General Accounting and the General Ledger, Accounts Receivable, Accounts Payable, Fixed Assets, Financial Planning & Analysis, and Procurement/Supply Chain functions such as Contract Management, Vendor Management, Requisitions, and Purchasing.

Requirements have been documented and Panorama is currently working with STOF to create the RFP to release to potential vendors, analyze the responses and assist in driving the vendor scripts and vendor demonstrations. The Financial Systems Management ERP software vendor has not been selected. We are currently in the vendor scoring phase of the project.

ERP Selected: NextGen EMR

Project Size: \$476,000 Combined

Project Team: Rich Goluskin, Steve Ditty, Chris Devault, Darlene Stromberger

Dates: Health Systems – 3/1/2019-8/12/2020

Financial Systems - 2/1/2022 - Present

Contact for the Health Systems Project

Tiffany Mallwitz, Project Manager/Business Analyst, (954) 966-6300 x 11541.
TiffanyMallwitz@semtribe.com

Contact for the Financial Systems Management Project

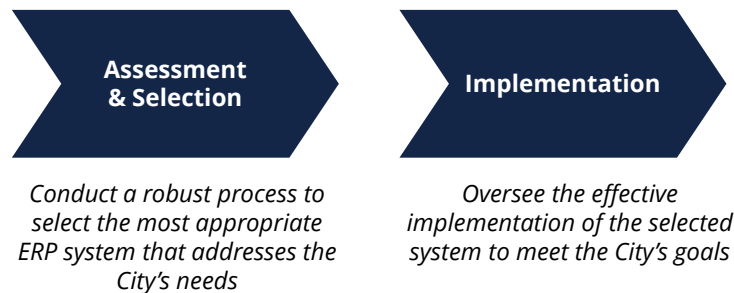
Carla Ferrarri, ERP and System Integration Manager. (954) 966-6300 x11334.
CarlaFerrarri@semtribe.com

4.4 Statement of Services

Project Scope Approach and Timeline

Overview

The City of Superior desires to acquire and implement a new financial/ERP system to replace the Naviline Cental Square system that was implemented in 1993. The proposed approach for replacing the Naviline system entails two major sequential projects:



In line with the City's Request for Proposal, the scope of the system to be selected and implemented is envisioned to be as follows:

1. Finance & Accounting

- General Ledger
- Budget
- Accounts Payable
- Purchasing
- Inventory
- Accounts Receivable
- Fixed Assets
- Cash Receipts
- Payroll
- Project/Grant Accounting
- Financial Reporting

2. Human Resources

- Position Control
- Recruiting
- Benefits Administration
- Time & Attendance
- Police Department Scheduling
- Fire Department Scheduling
- Performance Management
- Professional Development/Learning Management
- Employee Self-Service

3. Community Development

- Permits
- Compliance
- Inspections

4. Utility Billing

- Service Provisioning: start/stop/transfer service
- Meter management
- Billing
- Customer Service
- Infrastructure maintenance management

Interwoven into the above areas, Panorama will also assess the City's document management and document storage requirements to ensure the new ERP has those capabilities.

Overview: Assessment & Selection Project

Based on our understanding of the City's RFP, we are proposing an assessment and selection project that leads the City to select an ERP system that meets its overall objectives. These objectives are focused on the implementation of a comprehensive solution that helps manage City finance, procurement, human resources management, community development and municipal billing processes, as well as integrate effectively with other systems used in the City's computing portfolio. As part of this effort, Panorama will assist the City in selecting an ERP solution that:

- Enhances access to City data and information for decision-making purposes.
- Automates, streamlines, and/or otherwise improves internal processes.
- Maximizes software utility.
- Reduces or eliminates workarounds and manual processes.

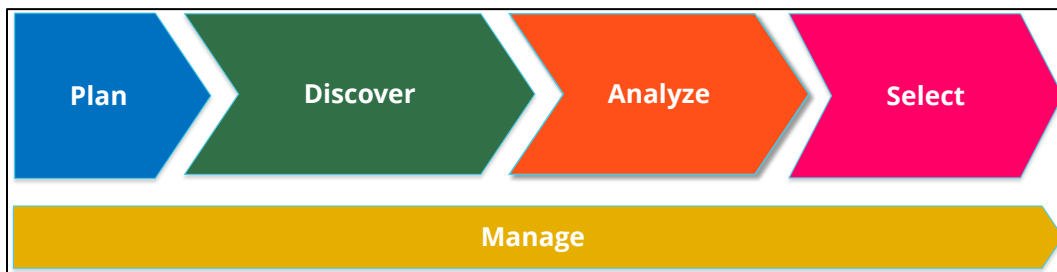
To accomplish these objectives, Panorama will structure a project to assist the City in the assessment and selection of a new ERP system by undertaking the following major activities:

- Assess the City's in-scope business processes and supporting systems via workshops with key personnel.
- Define functional and technical requirements for a new ERP system.

- Document major processes in the in-scope functional areas and identify current pain points/inefficiencies together with opportunities to alleviate them via system capabilities, application of best practices, and process streamlining efforts.
- Conduct a market survey to identify potential software solutions and the directional costs associated with those solutions.
- Assist the City in preparing a Request for Proposal (RFP) for the new ERP system.
- Evaluate vendor responses, including degree of fit vs. requirements, solution cost, and other factors.
- Assist the City in selecting three finalist vendors to showcase their solutions in software demonstrations.
- Develop City-specific demonstration scripts for vendors to execute in the demonstrations.
- Coordinate and manage the vendor demonstration process.
- Compile all relevant information and assist the City in selecting a new ERP platform.
- Assist the City with contract reviews and negotiations with vendors.
- Conduct implementation planning efforts to develop a deployment approach and define implementation project phasing, timelines, and resource requirements.

Approach: Assessment & Selection Project

Panorama has developed a detailed methodology for the selection of enterprise systems such as ERP. Should we be awarded this engagement by the City, we will apply this methodology and customize it to the specific scope being requested for this project. Our methodology for conducting these types of selection projects calls for segmenting our work into five phases, namely:



Each phase is described below.

Phase 1: Plan

During this phase, the Panorama team will confirm the scope of the selection project and prepare a project plan with tasks, budgets, and resource assignments. This project plan will be the basis for understanding project status and progress against budget. Panorama and the City will mutually agree on the cadence and specific scheduling of status meetings.

Another major objective of the Plan phase is to schedule the Business Process workshops (i.e., Discovery/Requirements sessions) to be held as part of the Discover phase (discussed below), and to ensure that the right participants and stakeholders are present at those sessions. This work is done in close collaboration with City project leadership.

Prior to the detailed sessions to be held in the Discover phase, Panorama will organize and conduct a project kickoff session with key stakeholders to provide awareness of the project’s objectives, approach, and expected timeline.

Specific activities and tasks in this phase include the following:

Phase	Activity	Task
Plan	Project Planning	Project Setup
		Planning Meetings
		Prepare & Review Project Plan
		Prepare & Review Communications Plan
		Prepare Kickoff Materials
		Prepare for Business Process Workshops
		Conduct Project Kickoff

Deliverables to be produced during this phase include the following:

- Initial Workshop Schedule
- Communications Plan
- Workshop Guides (partial sample follows)

ERP Selection
Workshop Guide: Record to Report

Volumes/Statistics

- Number of funds
- Number of programs
- Number of fixed assets
- Average days to close a month

General Ledger

- Describe your corporate/legal entity structure.
- What is your fiscal calendar?
- Describe your current chart of accounts structure (coding block). Do you record and report by:
 - Fund?
 - Program?
 - Divisions/Departments?
 - Region/Geography/Location?
 - Cost Center?
- Describe to what extent (please give examples) you post:
 - Common/single-instance journal entries?
 - Recurring journal entries (e.g., amortization of prepaid expenses)?

Phase 2: Discover

The Discover phase begins information gathering activities. To begin, Panorama will request to have a session with members of the City’s leadership team to understand the team’s goals and objectives, together with a clear identification of the key measures of success that will be used to evaluate the project’s outcome. Part of this process will also be to understand any significant risks, resource constraints, or challenges that the ERP selection team should be aware of as it conducts its work.

The leadership team session will be followed by business process/requirements gathering workshops. The identification of specific workshops and participants will be defined in the Plan phase. The going-in position is that there will be a workshop for each of the four major areas outlined as being in the functional scope of the project. This approach may be adjusted, and a different number of workshops may take place depending on decisions taken during the Plan phase.

Business process/requirements gathering workshops will focus on defining current business processes, and by extension, the pain points, inefficiencies, and potential improvements that could be made to those processes. Another focus of the workshops will be to identify requirements for the new system, focusing attention on those functions and capabilities that are important for the City and considered “differentiating” in the way different software packages address (or don’t address) that functionality.

After a process to document business processes and consolidate requirements information gathered, Panorama will validate that information with City personnel to ensure accuracy and completeness of the information captured. Panorama will request that City stakeholders prioritize each requirement documented into categories that denote the level of criticality associated with the requirement. This categorization will allow for a more granular evaluation of candidate solutions to determine relative strengths and weaknesses in supporting internal and external requirements.

The validated requirements will be used directly in the preparation of a Request for Proposal (RFP). Panorama will assist the City in preparing and issuing the RFP consistent with procurement protocols and guidelines. Although we envision this to be a public bid, we will contact vendors we believe to be feasible candidates to make sure they are aware of the RFP.

The requirements be an integral component of the RFP, where proponents will be asked to evaluate which requirements they meet (and how they meet them). This data will be used to evaluate vendor capabilities and alignment with the needs of the City. However, the requirements provide value in many downstream elements of the selection and implementation process. They will be used to develop demonstration scripts used by vendors selected to demonstrate their products; they will guide efforts to streamline or improve business processes; and they will serve as a starting point for implementation activities ranging from blueprinting/system design to test scenarios for the user acceptance test.

In addition to the evaluation of functional/business requirements, Panorama will also develop an understanding of the City’s technical needs. This will begin by having review sessions with the City’s Information Technology group to understand current systems and subsequently compiling an inventory or preparing a schematic that shows the City’s computing components and how they will interact with (or be replaced by) the new ERP. As part of this process, Panorama will obtain technical requirements and expectations for the new ERP. These requirements/expectations may include discussions on the new system’s deployment model (e.g., on-premise, single-tenant cloud, multi-tenant cloud), adherence to any City technical standards, use of mobility, etc.

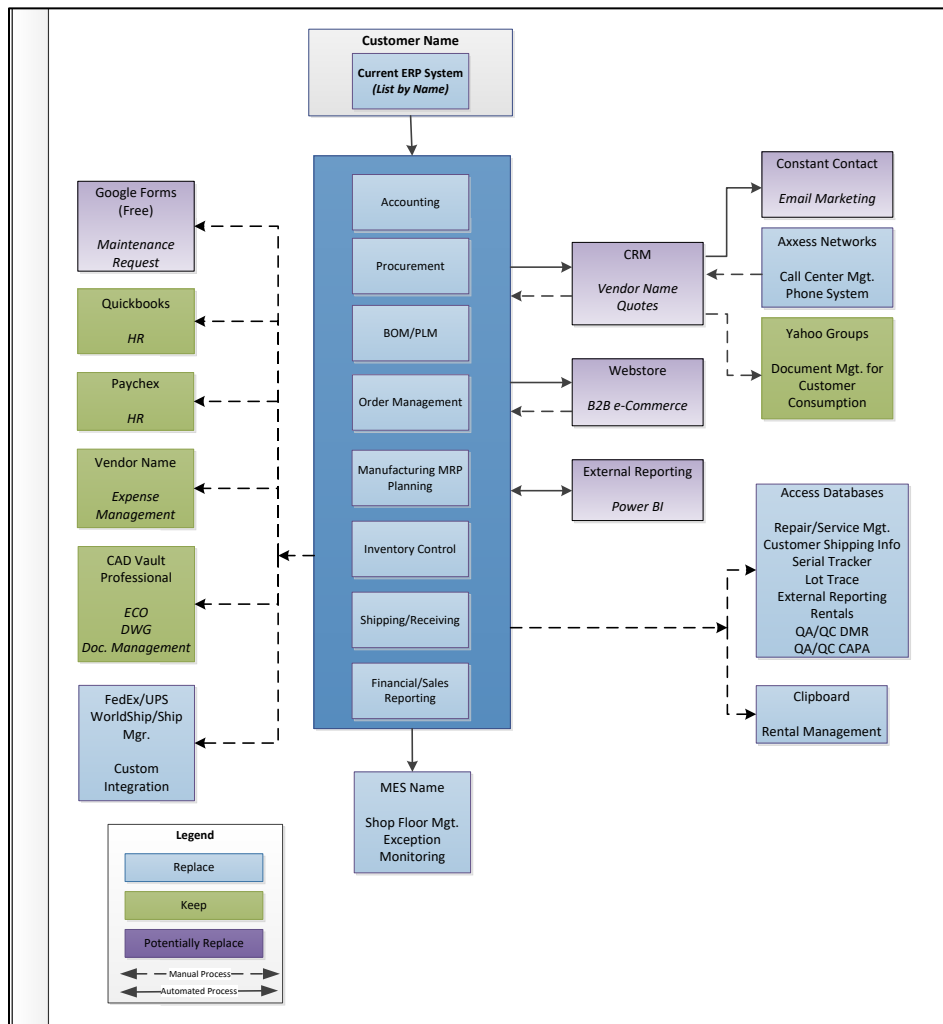
To wrap up this phase, Panorama will prepare and deliver an Assessment Summary that summarizes requirements captured and pain points identified (including recommendations for addressing them). The summary will also provide a directional estimate of the project cost, to be confirmed as selection activities continue and vendors are engaged in the process.

In summary, the specific activities and tasks in this phase include the following:

Phase	Activity	Task
Discover	Technology Assessment	Current State IT Overview
		Application Reviews
		Document Current State IT Map
	Business Process Assessment	City Leadership Team Session
		Business Process Workshops
		Document Requirements
		Document Business Processes
		Validate Requirements & Process Maps
	Assessment Recommendations	Compile Pain Points & Opportunities
		Develop Cost Estimates and Estimated Project Timeline
		Develop/Deliver Assessment Recommendations Presentation

Deliverables to be produced during this phase include the following:

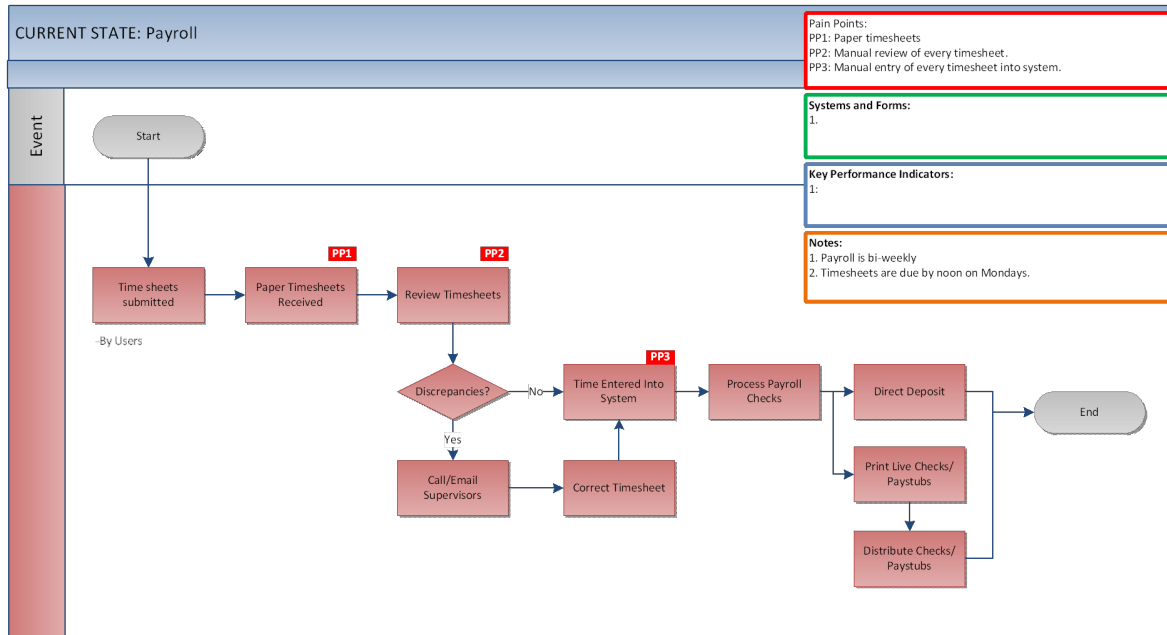
- Current State System & Data Map (sample follows)



- System Requirements (partial sample follows)

Functional Process	#	Requirement	Priority (M/V/N)	Notes/Comments	RFI Item
Capital Assets					
	1	The ability to create request for capital project with categorization types: discretionary, routine, new builds, etc.	M		Y
	2	The ability to record approved spending budget for a capital project and provide ability to create an asset / expenditure type from that project.	M		Y
	3	The ability to track labor for capital assets between departments, business units and companies.	M		Y
	4	The ability to code invoices (charge subcontractors) to the capital project.	M		
	5	The ability to connect the fixed asset and general ledgers.	M		
	6	The ability to report on historical spending by year including labor, PO's and receipts.	M		
	7	The ability to add & track components of an asset.	M		Y
	8	The ability to recalculate depreciation when an accessory is added.	M		
Asset Management					
	9	The ability to accommodate parent/child relationships between related assets, such as a master unit with one or more accessories.	M		Y
	10	The ability to reassign parent/child relationships.	M		Y
	11	The ability to attach memos, word documents, picture documents, etc. to assets records.	M		

- Process Maps (sample follows):



- Assessment Summary (format varies, but content will include a summary of requirements identified and an initial estimate of project costs)

Phase 3: Analyze

Panorama will use the results of the Discover phase to determine and recommend the scope of the ERP. We will consider if the City’s requirements are likely to be met by one integrated software solution (in which case a single RFP would be prepared), or if City requirements dictate that multiple solution “families” be considered (in which case two or more RFPs might need to be prepared). Once this strategy is agreed upon with the City, Panorama will recommend “Long List” vendors (up to 6 vendors are envisioned) who in our opinion should be informed of the upcoming

RFP. Panorama will then work with City stakeholders to prepare, package, and issue the RFP in a manner that is consistent with the city’s procurement rules.

Once vendor responses are received, Panorama will evaluate vendor proposals in two main areas: a) degree of fit with the requirements, and b) estimated total cost of ownership. Panorama will review these vendor responses with the City’s evaluation team with the aim of selecting three “finalist” vendors who will be invited to demonstrate their software solutions.

As preparation for these vendor demonstrations, Panorama will prepare (and the City will review and validate) a demonstration script for vendors to use during their sessions. Based on previously identified requirements, the demonstration script will require the vendors to showcase “day-in-the-life” scenarios that are applicable to the City specifically. Panorama will work with City project leaders to identify all the stakeholders that should participate in the vendor demos and provide them with a demonstration survey that can be used to record their evaluation of how well the vendors demonstrate the requested scenario. These demo surveys will then be compiled into an analysis that outlines each vendor’s score (by scenario, functional area and/or overall), relative strengths and weaknesses, and qualitative comments made by demo participants.

In summary, the specific activities and tasks during this phase include the following:

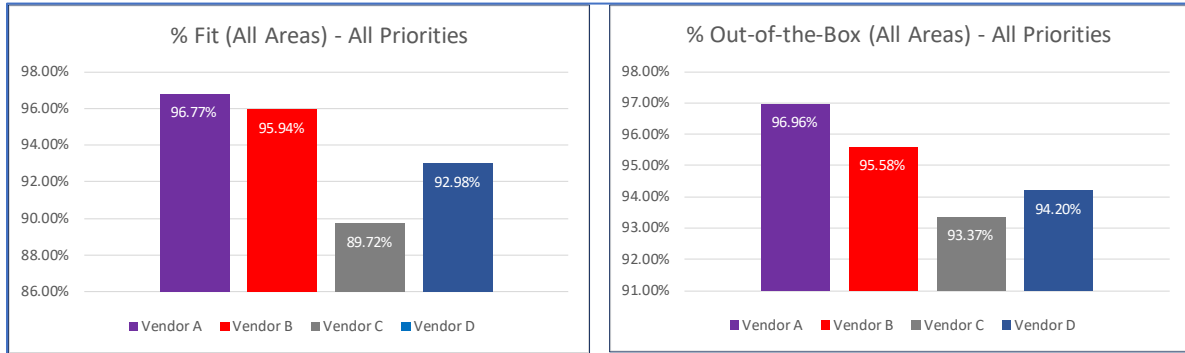
Phase	Activity	Task
Analyze	RFP	Vendor Identification & Contact
		Develop Evaluation Criteria
		Develop RFP Content
		Vendor Management
		Evaluate RFP Responses
		Short List Selection
	Demonstration Preparation	Vendor Scheduling
		Develop Demo Script
		Demo Script Review
		Prepare Demo Survey(s)
		Conduct Vendor Discovery Calls

Deliverables to be produced during this phase include the following:

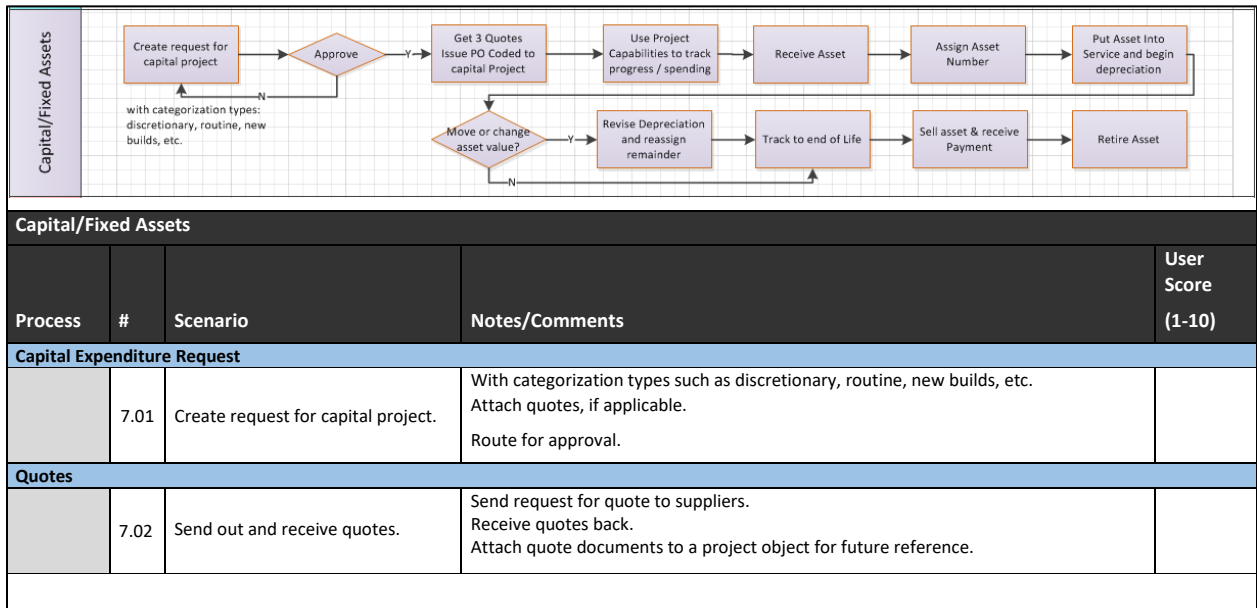
- Request for Proposal content (partial sample of major component of RFP follows)

P A N O R A M A CONSULTING SOLUTIONS		CORE APPLICATION	POINT SOLUTION (i.e., generally available software product)				CUSTOMIZATION			
For each of the functions or requirements shown below, please place "X" in the column that best describes your solution's level of functionality.		Supported through native "out of the box" functionality with configuration if necessary.	Supported through a point solution that is embedded into the core application. No integration development required.	Supported through a point solution that is not embedded into the core application, but integrated with the core application. No integration development effort required.	Supported through a point solution that requires development to be fully integrated with the core application.	Requires Development	Supported, but will require modification of the core application source code.	Not supported	Optional: Please add any comments or points that will help understand your software's functions, features or unique approaches in this area.	
ID	Functional Requirements	Implementation Examples and Explanations	Out of the box	Embedded	Existing Integration	New Integration	New Extension	Modification	Not supported	Comments - Key Points
0.01	Multi-Functional Requirements	Implementation Examples and Explanations: e.g. Multiple business lines.								
0.001	The ability to support multi-company capabilities.									
0.002	The ability to support multi-site (i.e., plant, warehouse) capabilities.									
0.009	The ability to support end-to-end lot traceability.									
0.010	The ability to support serialization of items.									
Core Functional Requirements - Any Business Required During all Modules										
0.012	The ability to support general process formula based manufacturing.									
0.013	The ability to support inverse/reverse Bill of Material.									
0.014	The ability to support catch weight as well as defined weight items.									
0.015	The ability to support full tracking and traceability by lot, sub-lot/batch, and serial number.									

- RFP Analysis (partial sample of analysis follows)



Demonstration Script (partial sample follows)



- Demonstration Scoresheet

Phase 4: SELECT

In this phase, critical vendor demonstrations will be conducted with short-listed vendors tasked with executing the demonstration script developed in the previous phase. City stakeholders will be asked to score each presenting vendor on how well they met the requirements of the demo script. Feedback from City stakeholders will be compiled, including both quantitative and qualitative analysis of each vendor. This information, together with previous data gathered to date, will result in an ERP recommendation. This includes information from the vendors’ proposals, the subsequent software demonstrations, and additional information provided by the software vendors.

In parallel with developing a vendor and software recommendation, multiple activities may occur with finalist vendors, including negotiating solution price and contractual terms and conditions, and developing implementation plans that affect their overall proposal approach, timeline, and

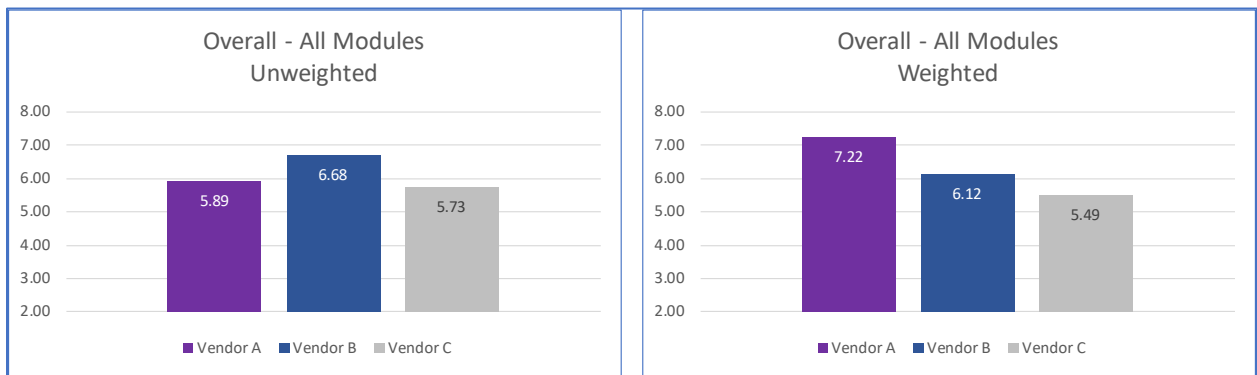
cost. Ultimately these activities will culminate with a presentation to the City’s leadership team with an ERP selection recommendation.

Specific activities and tasks in this phase include the following:

Phase	Activity	Task
Select	Software Evaluation	Conduct Vendor Demonstrations
		Vendor Follow-up
		Compile Demo Results
	Software Recommendation	Compile Final TCO
		Implementation Planning/Technical Sessions
		Negotiations Support
		Prepare & Deliver Software Recommendation

Deliverables to be produced during this phase include the following:

- Demonstration Analysis (partial sample follows)



Implementation Timeline & Resource Plan (format varies)

Software Recommendation – a PowerPoint presentation summarizing all relevant qualitative and quantitative data supporting the recommendation (format varies)

By this point Panorama will have a clearer idea of what the implementation project will require in terms of timeline and resources, which will depend on the specific system selected and other factors. This information will be used to organize the implementation project for both the City and Panorama.

As part of the software recommendation, Panorama will also define and suggest any pre-implementation projects that in our view should be undertaken prior to any system implementation effort. Although these projects will be specifically identified as a result of our initial assessment, common pre-implementation projects with other clients have included current state data evaluation and clean-up, process streamlining, and other efforts aimed at optimizing the time and cost related to the City’s ERP implementation project.

Phase 5: Manage (SELECTION PROJECT)

This phase is executed in parallel with all other selection phases. It is where all project governance activities are budgeted and conducted, including project status meetings and report preparation, project team and client communications, and overall project oversight, deliverable review and quality assurance.

Specific activities and tasks in this phase include the following:

Phase	Activity	Task
Manage	Project Governance	Project Status Reports & Meetings Calls, Emails, Deliverable Review

Service Delivery Approach: Assessment & Selection Project

Panorama works with its clients to conduct its projects in the most value-added and cost-efficient manner. This includes performing some project tasks on-site and others remotely. For this specific project, we are proposing that workshops in the Discover phase, as well as the vendor demonstrations in the Select phase, be conducted on-site with the appropriate City stakeholders. Other activities, such as documenting requirements and processes, developing RFP content, and preparing the demonstration script will be conducted remotely.

If the City wishes to conduct this project in its entirety remotely, for either logistical or cost reasons, Panorama stands ready to conduct all project activities in that manner.

Proposed Timeline: Assessment & Selection Project

The project timeline Panorama envisions for this ERP assessment and selection project is outlined below. We estimate as little as 21 weeks to reach a selection decision for the new ERP, provided City personnel are available and project activities can be scheduled efficiently. Additional time may be necessary to conduct negotiations with the selected vendor and sign contracts, as these processes are highly dependent on vendor availability and the City’s desired pricing, terms, and conditions. The timeline is shown in three sections for additional readability.

ERP Assessment & Selection: City of Superior		Week						
Phase	Activity	0	1	2	3	4	5	6
Plan	Project Planning							
Discover	Technology Assessment		Gather	Document				
	Business Process Assessment		Business Process Workshops		Document & Validate Requirements & Processes			
	Assessment Recommendations						Compile Pain Pts/ Opps	Assessment Recomm
Analyze	RFP							
	Demonstration Preparation							
Select	Software Evaluation							
	Software Recommendation							
Manage	Project Governance							

ERP Assessment & Selection: City of Superior		Week							
Phase	Activity	7	8	9	10	11	12	13	14
Plan	Project Planning								
Discover	Technology Assessment								
	Business Process Assessment								
	Assessment Recommendations								
Analyze	RFP	RFP Prep	RFP				Evaluate Proposals		
	Demonstration Preparation	Demo Scripts						Discovery & Demo Prep	
Select	Software Evaluation								
	Software Recommendation								
Manage	Project Governance								

ERP Assessment & Selection: City of Superior		Week						
Phase	Activity	15	16	17	18	19	20	21
Plan	Project Planning							
Discover	Technology Assessment							
	Business Process Assessment							
	Assessment Recommendations							
Analyze	RFP							
	Demonstration Preparation							
Select	Software Evaluation	Demos & Follow-ups						
	Software Recommendation					Impl Planning Negotiations		Prep/Deliver Recommendation
Manage	Project Governance							

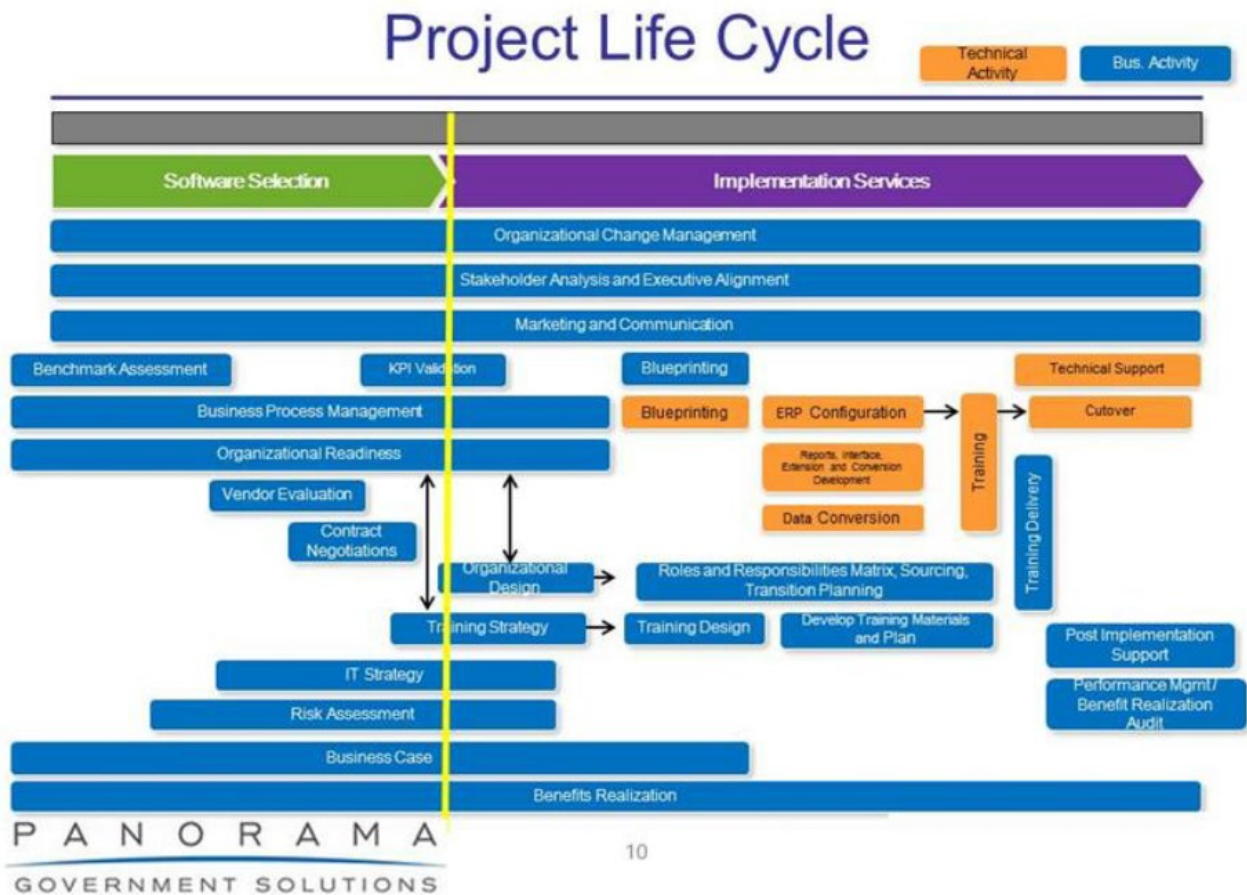
If the City desires this project to be completed as quickly as possible, availability to work with the right stakeholders will be of utmost importance. Conversely, some of our clients aim to conduct these projects at a more measured pace, due to resource availability, other important initiatives taking place, or other considerations. Should the City wish to conduct this project at a slower pace, Panorama is very flexible regarding the project timeline and can adjust as necessary.

Overview: Implementation Project

Panorama’s role in the ERP implementation will depend on several factors, including the selected software(s) and system integrators, availability and qualifications of internal resources, results from the organization readiness assessment, as well as the overall complexity of the planned implementation. When Panorama performs your ERP Software Selection, our team is already gathering intelligence and data to inform the best path towards a successful implementation, assessing risks and how to get the organization ready. The output from the selection phase explained above will inform the pre-implementation planning as well as the key activities and roles

that will need to be augmented so all the time invested in the selection continues to be leveraged during the implementation and thereby being more time and cost effective.

After the completion of the ERP Software Selection Phase, the ERP software selection project cuts over to the ERP implementation oversight project. The map below of the ERP software selection and implementation project life cycle is depicted. The vertical yellow bar depicts the cut over. To the right of the yellow bar, the Team will perform ERP Project Management Oversight for the Implementation project. We will work with you to aim to help select a strong implementation firm to perform the actual software installation.



As you will notice above, most activities are related to business activity rather than technical activity which means that a successful implementation will really depend on the organization's readiness and consulting partner that will ensure that the technical aspects are aligning with the business in terms processes and people to achieve the desired benefits.

Most of Panorama's clients prefer to use us as the overall Program Manager, during the implementation phase of the ERP project, since we also suggest we manage the Organizational Change Management (OCM) and Business Process Management (BPM) activities critical to ERP project success. When we act as your Project Manager, it provides clients with a single point of

contact throughout the entire lifecycle of the ERP project. This differentiates Panorama from other software selection consulting firms in that Panorama also stands behind the success of the implementation of the software recommended to its clients. Other clients will choose to use us as their Independent Verification & Validation (IV&V) manager which is more of the oversight and audit role during the implementation which provides organizations with an independent third-party audit to protect the integrity of the implementation thereby giving public sector leaders oversight coverage. Panorama's key differentiator remains its independence and the fact that we are not affiliated with any vendor, our oversight will also be as a true independent audit partner.

Panorama's implementation methodology is software deployment methodology agnostic, which means that it applies best practices across any ERP software implementation approaches to ensure that not only the program management, business process management, and organizational change management aspects of the implementation are properly addressed, but that the technical aspects of the software implementation are properly managed, as well.

Another unique differentiator is the fact that Panorama has an Expert Witness and Project Recovery practice that allows us to continuously improve based on our findings of other failed ERP implementations so that we are not only improving internally but also learning from what other organizations and vendors may have done wrong so that we add additional points of audit to our processes.

Approach: Implementaion Project

Panorama has adopted PMI's PMBOK philosophy alongside our own ERP methodology following best practices in the public sector. Our average project manager has the following characteristics.

- PMP® certified or PMBOK trained.
- Average 20+ years ERP experience
- Average 10+ years leading large scale ERP projects.
- Have led 5+ ERP implementations.
- Industry experience – Public Sector – Municipal.

In its role as Project Manager of the ERP implementation, Panorama will coordinate all enterprise system initiatives within scope. Through these tasks, Panorama will ensure collaboration with your Steering Committee, Project Managers, and 3rd Party Integrators and Consultants. Some key tasks throughout the project include:

- Serve in a project oversight capacity for client and liaison between ERP and other software vendors and Client.
- Track timeline, milestones, budget, and deliverables to keep project on track.
- Lead status meetings between software vendors and Client.

- Participate with Client and Software Vendor to outline system configuration and future state functionality.
- Participate in organizing and tracking user acceptance testing with Client staff to ensure requirements are met with respect to each department and/or division.
- Participate in production deployment planning.
- Participate in production cutover and implementation.
- Participate in Post Go-Live support as needed.

Overview of Key Implementation Phases

As previously mentioned, product-specific methodologies for ERP deployment will use proprietary language and structures that are designed around the specific parameters and capabilities of any given system. Virtually all ERP implementations follow the same basic structure in terms of the process by which the product is deployed.

The following breakdown of implementation phases provides a “non-flavored’ look at what you can expect during the course of the implementation.

Our approach to the implementation is similar to our philosophy of people, process and technology so we layer OCM and BPM workstreams that are executed alongside the Project Management & Technical Configuration and Installation tasks deployed during each phase below to ensure complete organizational alignment.

The Implementation Lifecycle


PANORAMA IMPLEMENTATION SERVICES

	Plan	Design	Build	Test	Deploy	Optimize
Organizational Change Management	<ul style="list-style-type: none"> • Stakeholder Analysis • Project Comm plan • Org Readiness Assessment • Business Case and KPI Validation Sessions 	<ul style="list-style-type: none"> • Stakeholder alignment planning • Project launch messaging • Change Impact Analysis • Initial core team system training 	<ul style="list-style-type: none"> • Facilitate change discussions • Define job roles and responsibilities • Facilitate org design changes • Design Course Curriculum 	<ul style="list-style-type: none"> • Facilitate change discussions • Execute Change Impact and Org Design Action Plans • Create training documentation • Train the Trainers 	<ul style="list-style-type: none"> • Facilitate change discussions • Roll out revised job roles • Org Readiness Assessment • Manage end-user training 	<ul style="list-style-type: none"> • Refine job roles and responsibilities • Org Readiness Assessment • Conduct refresher training • Benefits Audit & measurement
Business Process Management		<ul style="list-style-type: none"> • Define level 1/2 “to-be” processes • Define level 3 “to-be” processes • Configuration and customization requirements 	<ul style="list-style-type: none"> • Define level 4/5 “to-be” processes • Process validation • Implement pre-go-live process changes 	<ul style="list-style-type: none"> • Conference room pilots • Implement pre-go-live process changes 		<ul style="list-style-type: none"> • Post-implementation process review and validation
Technical Configuration & Installation	<ul style="list-style-type: none"> • Install infrastructure 	<ul style="list-style-type: none"> • Install software • Software gap analysis • Design system architecture 	<ul style="list-style-type: none"> • Configure and customize software • Data conversion plan • Functional validation 	<ul style="list-style-type: none"> • Test software configuration and customization • Conference room pilots • Integration tests 	<ul style="list-style-type: none"> • Go live technical support • Training validation and support 	<ul style="list-style-type: none"> • Technical adjustments, per Benefits Audit
Project Management	<ul style="list-style-type: none"> • Implementation planning workshop • Implementation plan • Project charter and budget • Implementation kickoff 	<ul style="list-style-type: none"> • Manage plan and budget • Issue and risk management • Stage gate review 	<ul style="list-style-type: none"> • Manage plan and budget • Issue and risk management • Stage gate review 	<ul style="list-style-type: none"> • Manage plan and budget • Issue and risk management • Stage gate review 	<ul style="list-style-type: none"> • Manage plan and budget • Issue and risk management • Go/No-Go assessment 	<ul style="list-style-type: none"> • Manage plan and budget • Issue and risk management • Post-implementation audit

1. Planning Stage


The plan phase covers the development of the overall program plan and its in-scope project plans. This phase allows your project team to work with the external implementation team to initialize the project, develop and/or confirm project scope, align scope with company strategy, identify team members, build stakeholder support, and ultimately develop a detailed implementation plan.

Objectives




- Educate implementation partner team about your business
- Define project goals
- Develop project awareness
- Establish overall project structure / project governance
- Train project core team on base solution functionality

Outputs/Deliverables




- Implementation partner understands your business
- Core team trained on out-of-the-box functionality
- Updated project charter
- Updated communication plan
- Configuration design
- Technical design for system gaps
- Data migration design & plan

Inputs



- Current business processes
- Benefits realization metrics / strategic goals of the project
- Project organization chart / reporting responsibilities
- Project team roles & responsibilities
- Statement of Work

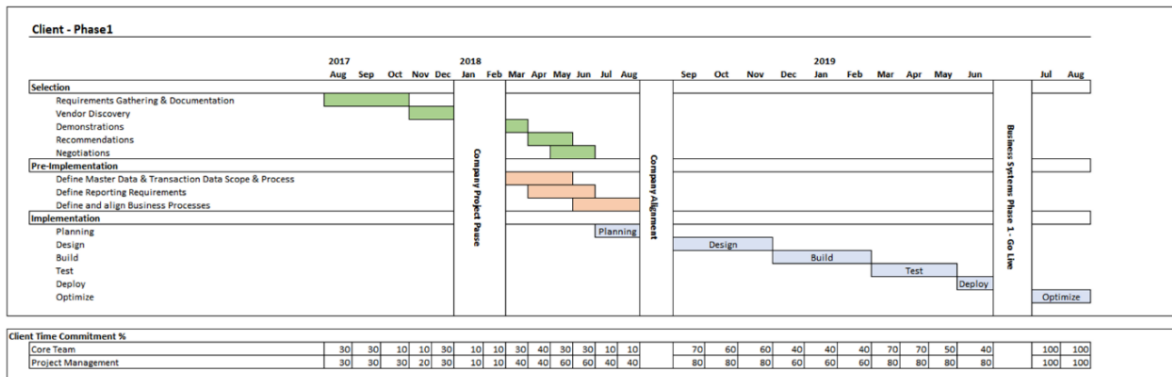
Considerations/Risks



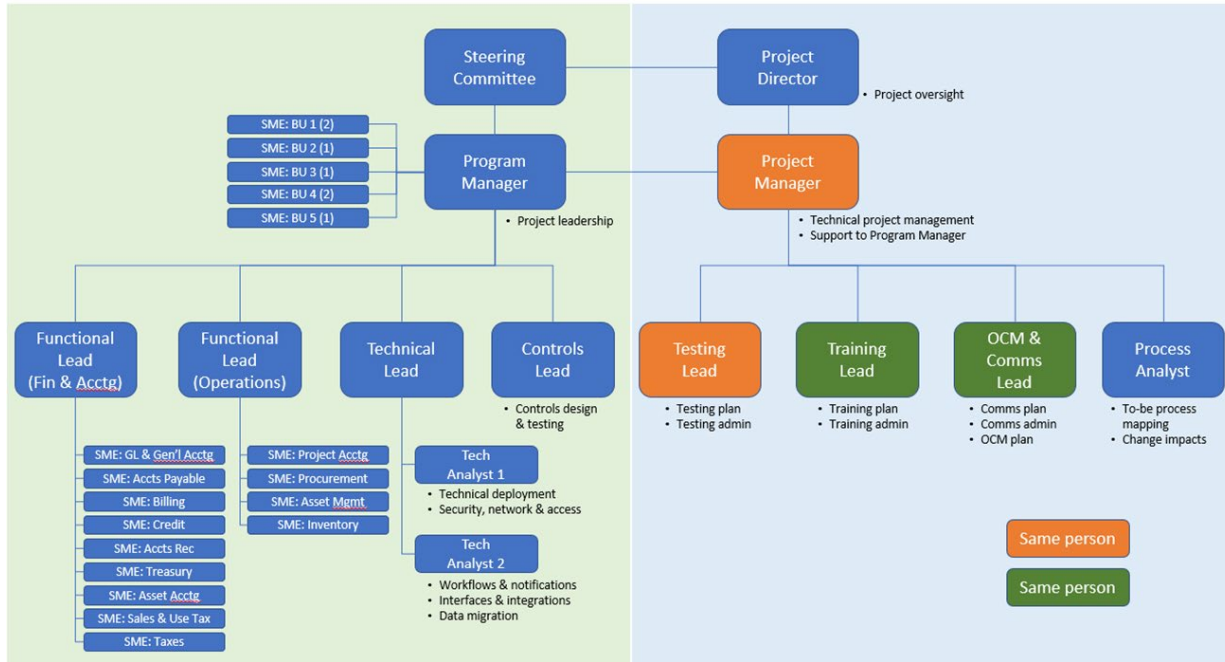
- Readiness for your team to educate and provide direction to implementation partner
- Key step to “get off to the right start” – align executive commitment
- Define what the change management plan is for the project

The overall purpose of the plan phase is to perform initial preparation for the project with respect to the overall implementation effort, as well as to ensure proper control of the ERP implementation program delivery on time and within budget by defining the program activities, deliverables, timelines, budget, roles, responsibilities, etc. The goals at this stage are to:

- Define and confirm the project goals and objectives.
- Clarify the scope of implementation.
- Review and validate the implementation strategy, defining the project schedule and implementation sequence.
 - Sample detailed timeline.



- Define key program metrics and KPI's.
- Establish the project organization and governance structure.
- Assign and allocate resources based on the specific needs of the project.
 - Project org structure, backfill strategy, hiring & training needs.
 - Sample org structure follows.



Key Activities

Below is an example of the standard tasks and deliverables completed during the Planning Stage of an ERP implementation project. There are a number of ongoing tasks that begin in the Planning Stage but run throughout the duration of the project. Key activities and common deliverables to be expected are:

- Project Planning, Startup, and Kickoff
- Define Project Charter, Governance and Oversight, Management, and Controls
- Validate Initial Business Process Scenarios
- Define Organizational and Project Team Structure
- Define Project Module, Modification and Interface Scope
- Data Migration and Governance
- Strategy and Planning – Cleansing
- Technical Infrastructure Selection, Installation and Environment Setup
- Communications Plan Creation
- Stakeholder Assessment Creation
- Develop Benefits Realization Strategy
- Develop Project Risk Assessment
- Define the Training Strategy
- Define the Quality Assurance Plan

Common Deliverables

- Project Charter
- Communications Plan
- Benefits Realization Approach
- Quality Assurance Plan
- Risk Management Plan
- Stakeholder Assessment
- ERP Road Map

Design Stage

The purpose of the Design is to produce the system design, which details how business processes will be developed, tested and implemented with the functionality of the selected system.

Processes documentation from the Business Process Management activities will be brought in at this time.

The refined processes will be used as a reference for configuration and preferred architecture of the system.

- During the Design Stage, it is essential to:
- Define the scope of software configuration.
- Perform any additional Business Process Analysis needed.
- Revise and finalize the overall project schedule and implementation sequence.
- Develop high-level development specifications for the interfaces, custom reports, customization.
- Facilitate the installation of the base system.

Key Activities

Below is an example of the standard tasks completed during the Design Stage of an ERP implementation project. By the completion of the Design Stage of the project, Chemonics can expect to have the base software installed to use for the software configuration. Key activities and deliverables to be expected are:

- Initial Core Team Training
- ERP Technical Training
- Detailed Business Scenario Blueprints Workshops
- ERP Implementation Roadmap Creation
- Design Configurations, Modifications, Interfaces, and Forms and Reports
- Data Migration – Conversion
- ORA II Creation
- Conduct Workforce Change Impact Review
- Design Benefits Realization Plan and Workshops

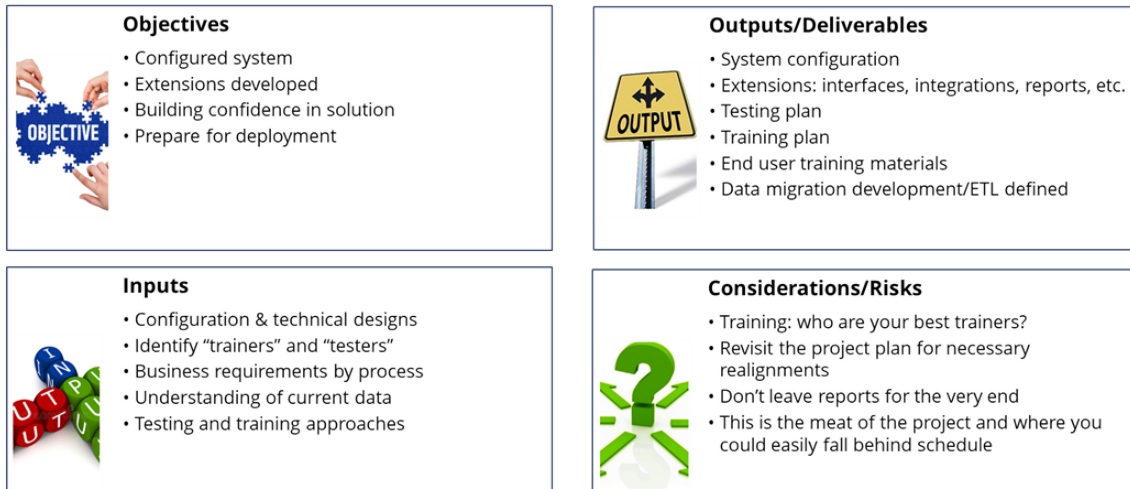
Common Deliverables

- Core Team Training Schedule
- ERP Application Strategy Roadmap
- Business Scenario Blueprints and Sign-off
- Organizational Readiness Assessment II
- Workforce Change Impact Analysis
- Communication Plan Review
- Benefits Realization Review

By the completion of the Design or Blueprinting Stage of the project, you can expect to have the base software installed on the hardware and have the basis for the software configuration. Panorama will also be conducting and delivering many of its organizational change management services and deliverables during this stage, providing communication, education and support for your staff during the transition, while also gaining invaluable insight into the sentiments and opinions surrounding the project.

Build Stage

The purpose of the Build Stage is to develop the base system capabilities to execute business processes defined during the Blueprint Stage and provide you with the first round of proposed functionality that will provide the ability to plan the testing for the system and begin developing training for all employees. During this stage, your software implementer will develop the base system and deliver both a training environment in the software, and some level of training materials to accompany it. Panorama will continue its organizational change management activities through the Build Stage as it delivers a Change Action Plan that outlines how employees will be guided through the transition, and familiarizes them with any changes to their roles, responsibilities, or processes. This will also include a Training Strategy to fill the gaps not supported or provided by your software implementer.



Key Activities

This stage will see the development of the base software into a system that meets the needs of your team. The Build Stage will encompass development of the software, all accompanying technical documentation, and development of end user training materials and curriculum on the selected software. Train-the-trainer sessions will take place during this stage. These sessions are usually provided by your software implementer, but this will vary widely. Panorama can help support the training effort by creating the overall training strategy, create a performance coach program to have a structured approach to training, and also provide a training development plan by occupation to ensure all key skills and competencies needed are outlined in a formal training plan.

Typical ERP activities and deliverables for the Build Stage of an implementation project are:


- Re-Define Detailed System Blueprints
- Build Configurations, Modifications, Interfaces, and Forms and Reports
- Create Security Authorizations, Profiles, and Roles.
- Data Migration – Conversion and Master Data Definition
- Finalize End-User Training Strategy
- Conversion Planning, Cutover, and Preparation

Common Deliverables

- Initial Conversion, Cutover and Plan
- Communication Plan Review


Test Stage

The purpose of the test phase is to test the functionalities of the software that have been built within the system. End to end testing will evaluate the successful completion of the build and confirm functionality for the day that go-live occurs, and the system is converted over to operations. System performance testing is likewise conducted in the phase. Until sign off on successful multiple user acceptance tests (UAT) are completed, a go-live will not occur. A software testing life cycle (STLC) is a set of steps used to test software products. Software testing is a critical part of preparing software for use, and a STLC helps make this process more sophisticated, consistent and effective. Training is also a major component of this phase. The STLC guides the end users through the transition, and familiarizes them with any changes to their roles, responsibilities or processes.




Objectives

- Tested system
- Tested data migration
- Widen the audience exposed to the project




Outputs/Deliverables

- Test results
- Tested/cleansed data
- Deployment plan and cutover schedule
- Contingency plan



Input

- Testing plan: scenarios, use cases, test cycles, test data
- Data migration design
- Performance specifications
- Security design



Considerations/Risks

- Ensure clear test cases and expected results
- Prevent scope creep during testing

Key Activities

The majority of this stage will focus on the technical aspects of the implementation and verifying system performance and requirements fulfillment. There will also be significant effort to plan the pending system transition cut-over. The expected activities and deliverables of the Test Stage of ERP implementation projects are:

- Create Test Scripts
- Conference Room Pilot/UAT
- Create Training Documentation
- End User Training
- Test Preparation/Data Loads/Test Scripts
- Technical Test – Modifications and Interfaces
- Data Migration – Cleanse, Preparation, and Load
- Finalize Cutover, Conversion and Plan

- Develop Contingency Plan
- Security Definitions
- System Performance Testing
- Workforce Transition Execution
- Benefits Realization Testing
- ORA III Creation


Common Deliverables

- Completed Unit Testing and Results
- End-User Training Documentation, Programs, and Materials
- Cutover Work Plan
- Contingency Plan
- Change Impact Workforce Documentation
- Organizational Readiness Assessment III
- Revised Risk Measurement Assessment
- Communication Plan Review

Deploy Stage


The purpose of the Deploy Stage is to execute the system Go-Live decision, deploy the system, and facilitate the end user cutover. The remaining cutover activities (including technical, testing, training, and system management) are to be completed and readiness finalized to go live with the selected ERP system.

DEPLOY




Objectives

- Solution configuration for end user testing
- Data successfully migrated to Production
- Trained end users
- Successful go-live: no interruptions
- Systematic approach to enduser support




Outputs/Deliverables

- User acceptance test results
- Trained end users
- Business partner communications: vendors, clients
- Go-live decision
- Operational system
- Support plan: locations, help desk, super users



Inputs

- Finalized application configuration & documentation
- Successful end-to-end system test
- Cleansed data
- Successful mock data migration
- End-user training materials and job aids



Considerations/Risks

- How to make a "go/nogo" decision
- Training always takes longer than you think- are users sufficiently trained?
- Transparency with business partners
- When to go to "plan B"
- Auditor acceptance required?
- Celebrate major accomplishment!

Key Activities

At this point the transition to the new systems becomes the focal point of the project activities. The expected key activities and deliverables completed in the optimize phase of an ERP implementation project are:

- Cutover and Go-Live Planning and Preparation
- Business Transition Planning for Cutover
- Refresh Data Environments
- Update Security Roles
- Infrastructure Finalization
- Pre-Go-Live Operations
- Setup and Install Production Environment(s)
- Data Migration to Production
- Legacy System Decommissioning Strategy
- Risk Assessment Measurement
- Final Cutover and Controlled Process Go-Live

Common Deliverables

- Go/No-Go Cutover Plan, Strategy, and Assessment
- System Stabilization Metrics
- System Go-Live
- Communication Plan Review
- Revised Risk Assessment

Optimize Phase

The purpose of the optimize phase of the project is to ensure that Client is realizing the expected benefits from the newly implemented system. Post – Go-Live, there will be a formal addressing of all quality issues, performance gaps, issues and risks noted during the initial period of system use. A plan to monitor the benefits derived from the implementation project will be finalized and put into action. Support and maintenance services and procedures will be confirmed and documented.

Key Activities

The Optimize Phase consists of those processes performed to conclude all activities across all Project Management Process Groups to formally complete the project, phase, or contractual obligations Although typically implemented 2-3 months after go-live, this stage can be continued iteratively throughout years after the system has been installed. The standard activities and deliverables of the Optimize Stage are:

- Post-Implementation Audit
- Define Additional Phases Implementation Scope and Timeline
- Knowledge Transfer Management
- Month-End Process Support
- Post-Go-Live Support

- Transition to IT Support

Common Deliverables

- Audit Performance Assessment/KPIs

Proposed Timeline: Implementation Project

We anticipate the software Go-Live will be 12 months, plus an additional 60 days of post Go-Live support. This estimate will change based upon the selected vendor/system implementer and the agreed upon implementation plan between the Client, Software implementer, and Panorama.

Approach: Organizational Change Management

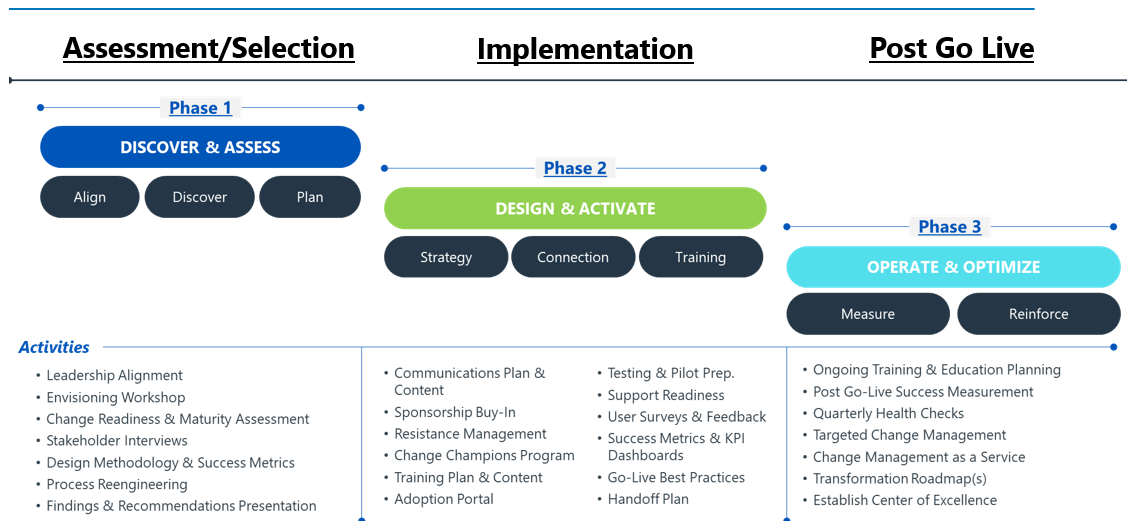
Organizational Change Management Support

Organizational Change Management is an important role in all successful ERP Implementations. Panorama’s OCM Engagement Roadmap is the foundation for how we help our clients manage organizational change at each stage of the project. Based on the needs of the project, we utilize some of these tools to drive the necessary OCM strategy. Our methodology is built on the industry leading ADKAR methodology. Our average project manager has the following characteristics:

- Average 15+ years OCM experience
- Average 10+ years leading large scale ERP projects for Change Management
- Have led 3+ ERP implementations for Change Management
- ODP, ADKAR, PROSCI or other certifications

The graphic below highlights some of the key strategies and tactics we have at our disposal during each project phase.

OCM ENGAGEMENT ROADMAP



Organizational Change Management – Assessment/Selection Phase

During this phase we will be conducting a Leadership Alignment Assessment. This assessment is generally conducted with the key leadership team and steering committee team members. This assessment is a mixture of survey, individual sessions, and a final group session. The goal of this assessment is to provide a leadership perception based on the following key data points:

Readiness -Leadership Alignment Assessment



The output of this assessment will help identify and drive key change management strategies as needed later in the project and will help us manage the overall implementation project. Here are some key tasks to be performed:

Activity	Task	Deliverable
Readiness - Leadership Alignment Assessment	Assessment Planning	
	Leadership Interviews	
	Steering Committee Interviews	
	Readiness Assessment Report	Leadership Alignment Assessment Report

Organizational Change Management – Implementation Phase

The key strategy here is to fill some of the OCM gaps of the software implementer and your internal capabilities. What we find is most software implementers will only provide training to your core project team members and they will be responsible for training the rest of the organization. Also, we find that of these project team leads do not have formal training experience, nor do they have the training tools required to not only train employees during the implementation, but also after the initial training has been completed. In addition, one of the most important elements of successful change management is a robust communication plan.

Strategic Communication plans are generally not provided by your software implementer, nor do most of our clients have the internal capacity or experience to build a communication plan for ERP projects. The following are the key deliverables we have proposed during this phase:

Training

We will build a training strategy to fill the training gaps in the software implementer implementation plan. The first thing we do is review the final SOW of identify the core training included by the software implementer. We will then work with you to build an overall training plan for the implementation and beyond. This includes two key deliverables:

1. **Training Plan** – Formal Training Plan highlighting key training needs
2. **Performance Coach Plan** – Training plan and strategy for your project team leads to be able to effectively train their key functional areas.
3. **Development Plan by Functional Area** – structured approach to identifying all the key skills and training requirements to be included in the training.

The following training deliverables are part of our proposal:

Activity	Task	Deliverable
Training Strategy	Vendor SOW Review	
	Training Plan Development	
	Performance Coach Workshop	
	Development Plan Creation	Development Plan by Occupation
	Final Training Plan	Training Plan

The following page has some sample deliverables from our training proposal:

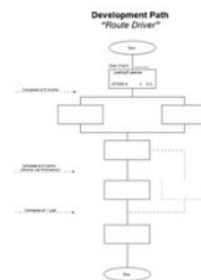
Training Plan/Support - Samples

Development Checklist
"Route Driver"

Date: _____

Employee Name	Job Title	Date to Title	Skill Level		Suggested Development Options	Action Plan	
			Proficient (Y/N)	Does Not Apply		Y/N	Completed
Company Orientation							
Meet Drivers				x			
Conduct Tour of Building				x			
Introductions to Inside Staff				x			
Introductions to Route Drivers				x			
Introductions to Service Technicians				x			
Introductions to Coin Room Personnel				x			
Introductions to Warehouse Personnel				x			
Review Benefit and compensation plan				x			
Diversity Training			N		Software/Info "Diversity Training" Program		
Congregous Conversations			N		Software/Info "Congregous Conversations" Training Course		

Development Plan will identify all key skills and training needs by occupation.



Development Path will identify future training needs by occupation, and how best to develop each occupation

Communication Plan

We will build a communication plan template to be used as the guide for all communication during the project. This will include us working with you to identify all the core communication vehicle most effectively used in your organization, then we will work with you and the software implementer to identify all the core messages required by occupation for the duration of the project and post go live. We will build the actual plan, but our proposal does not include creating all

the individual messages throughout the project, including emails, webinars, etc. We can provide this service, but it is not included in our proposal.

The following communication plan deliverables are part of our proposal:

Activity	Task	Deliverable
Strategic Communication	Vendor SOW Review	
	Identify Key Communication Vehicles	
	Identify Key Messages	
	Create Communication Plan Template	Communication Plan

Below is a sample communication plan template:

Communication Plan (Sample)

Target Audience	Type of Information	Message Content	Communication objective	Audience Population	Communication Medium	Communication Impact Level	Communicator	Duration of Message	Timing of Message Delivery	Frequency of Delivery
Production	Process Change	Implementing Barcode Scanning, what will change, how you are affected, how you will be trained.	To inform everyone of the pending changes and to show them the functionality of the new barcoding system.	25	Face to Face Meeting	Awareness	Ed, Fern, ?	10 minutes	August, September	2x

Matrix - Definition of Terms

- **Target Audience** Selected team, informal group, or individual who is targeted to receive strategic information regarding the project.
- **Type of Information** Specific type of information to be communicated. Examples include: Process changes, project status, Training, general info, Leadership Support.
- **Message Content** Actual message to be delivered based on target audience. Should contain the "What, Why, When and How".
- **Communication objective** Key outcome(s) of communication to the selected audience.
- **Audience population** Number of people who will be impacted by the communication medium.
- **Communication Medium** Type(s) of medium used to deliver the strategic message.
- **Communication Impact** Level of information provided to the target audience. (Awareness, Understanding, Commitment)
- **Communicator** Individual or team who will be delivering a strategic message to a team, informal group, or an individual.
- **Duration of Message** Actual time needed to deliver effective, strategic message. This would include time to read email, listen to voice mail, etc. This would include all time needed for all communication vehicles. For example, a 5 minute voice mail and a two page email could amount to 30 minutes.
- **Timing of Message Delivery** Length of time between when the key message is developed and when it is delivered to the target audience. This will vary depending on the type of message, communication vehicle, and the target audience.
- **Frequency of Delivery** Amount of times message is delivered to the same target audience.

Organizational Change Management – Post “Go Live” Phase

The most important time of an ERP implementation is “Go Live” and beyond. Now that the system is up and running you will need to evaluate many things to ensure future project success, including:

1. Have our employees received all the necessary training? Did it work? Do they need more?
2. How do we know when we are ready to take on a potential Phase 2 Implementation?
3. What are some of the key metrics that will help us understand how well we are reaching our project objectives?

In this phase, Panorama provides what we call a quarterly “Change Pulse Assessment.” This independent assessment will consist of us coming back on a quarterly basis to evaluate how the current stage of the project and how well you are meeting your key project success measures. This is a qualitative and quantitative assessment, and we work collaboratively with you to identify the success metrics and help coordinate a plan to meet those objectives not being met.

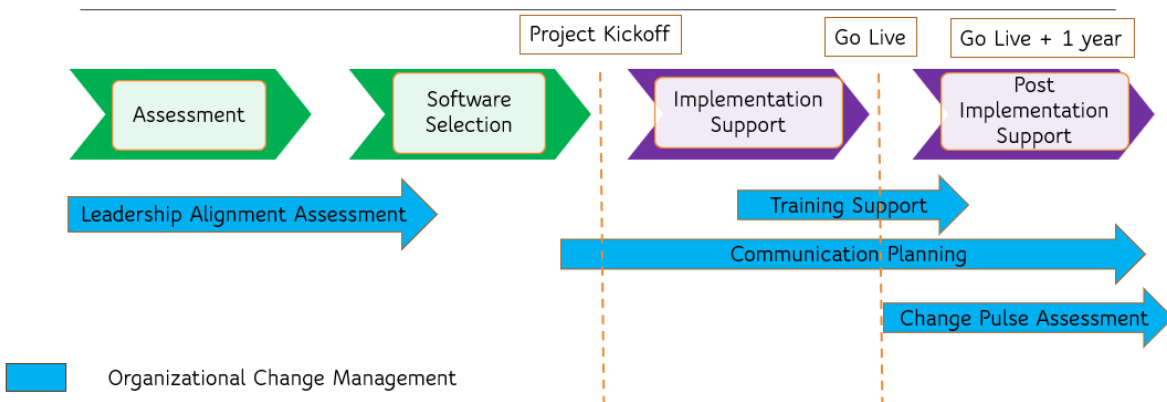
The following “Change Pulse” deliverables are part of our proposal:

Activity	Task	Deliverable
Change Pulse Assessment	Create Key KPI's to measure	
	Build KPI Templates	
	Data Collection of KPI Data	
	Create Change Pulse Report	Change Pulse Report

Proposed Timeline: OCM Project

We anticipate the Leadership Alignment Assessment will be conducted during the Assessment Phase of the project. Here is a breakdown of how we anticipate spending time for OCM activity throughout the project:

Expert Services – Product Offering - OCM



4.5 Fee Proposal

Project Cost

9. Enterprise Resource Planning Software Selection Advisory Services

Date: April 9, 2024

City of Superior, Wisconsin

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

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

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

Total Cost (Not-to-Exceed): \$ 194,269.75

Amount in written figures: One hundred ninety-four thousand, two hundred sixty-nine dollars and seventy-five cents

Completion Date: April 9, 2024 (date)

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

SIGNATURE  Date April 9, 2024

Print Name Z. Vanessa Davison

Name of Company Panorama Government Solutions, LLC

Address 2000 S Colorado Blvd., Tower 1, Suite 2000-407 Denver, CO 80222

Phone 720 515-1377 x 103 Fax 720-302-1556

E-mail Address vanessa.davison@panorama-consulting.com

* Please note that the not-to-exceed price above is for the Assessment & Selection Project. As discussed during the bidders call, we gave a range for the implementation project management since it will depend on the vendor(s) selected. We also provided a cost matrix based on our experience regarding what the vendor costs could be to assist City of Superior with budgeting.

Project Cost: Assessment & Selection Project

Following the City's request for fixed fee pricing, Panorama will invoice the City a total of \$194,269.75 for the assessment and selection project. Details of this pricing are shown below.

Assessment & Selection Phase	Corresponding RFP Scope of Work #	Activity	Task	Deliverable	Fixed Fee Price: Project Work	Travel & Expenses	Total Cost	
Plan	None	Project Planning	Project Setup			\$12,494.75	\$0.00	\$12,494.75
			Planning Meetings	Initial Session Schedule				
			Prepare & Review Project Plan					
			Prepare & Review Communications Plan	Communications Plan				
			Prepare Kickoff Materials					
			Prepare for Business Process Workshops	Workshop Guides				
Discover	5.2.1 5.2.2 5.2.3	Technology Assessment	Current State IT Overview			\$78,867.00	\$12,220.00	\$91,087.00
			Application Reviews					
			Document Current State IT Map	Current State System & Data Map				
		Business Process Assessment	City Leadership Team Session					
			Business Process Workshops					
			Document Requirements	System Requirements				
			Document Business Processes	Process Maps				
		Assessment Recommendations	Validate Requirements & Process Maps					
			Compile Pain Points & Opportunities					
			Develop Cost Estimates and Estimated Project Timeline					
			Develop/Deliver Assessment Recommendations Presentation	Assessment Summary				
Analyze	5.2.4	RFP	Vendor Identification & Contact			\$39,312.75	\$0.00	\$39,312.75
			Develop Evaluation Criteria					
			Develop RFP Content	Request for Proposal (RFP) Content				
			Vendor Management					
			Evaluate RFP Responses					
		Short List Selection	RFP Analysis					
		Demonstration Preparation	Vendor Scheduling					
			Develop Demo Script	Demonstration Script				
			Demo Script Review					
			Prepare Demo Survey(s)	Demonstration Score Sheet				
Conduct Vendor Discovery Calls								
Select	5.2.5 5.2.6 5.2.7	Software Evaluation	Conduct Vendor Demonstrations			\$22,637.75	\$12,120.00	\$34,757.75
			Vendor Follow-up					
			Compile Demo Results	Demonstration Analysis				
		Software Recommendation	Compile Final TCO					
			Implementation Planning/Technical Sessions	Implementation Timeline & Resource Plan				
			Negotiations Support					
Prepare & Deliver Software Recommendation	Software Recommendation							
Manage	None	Project Governance	Project Status Reports & Meetings			\$16,617.50	\$0.00	\$16,617.50
			Calls, Emails, Deliverable Review					
TOTAL						\$169,929.75	\$24,340.00	\$194,269.75

In the event additional services are required, the following rate schedule will apply:

Resource	Hourly Billing Rate
Project Director	\$295.00
Senior Manager/Project Lead	\$280.00
Manager	\$260.00
Senior Consultant	\$235.00
Consultant	\$215.00

If any travel is required for additional services, Panorama will invoice the City for travel time at 50% of the above rates. Actual travel expenses such as airfare, ground transportation, lodging, meals, and incidental expenses will be billed as incurred.

Assumptions: Assessment & Selection Project

In preparing its fixed fee pricing, Panorama made the following assumptions. Any deviations from these assumptions may result in additional charges to be presented in a change order.

1. The functional scope of this ERP Selection project is comprised of the four major functional areas (with their corresponding sub-areas) listed in the Overview section of the Project Scope, Approach, and Timeline section of this proposal.
2. Since workshops can be organized in many different ways, Panorama’s fees include up to 32 “clock hours” of time for discovery workshops.

3. Panorama’s fees include the documentation of up to 12 processes/process maps (three process maps for each of four major functional areas).
4. The City will assemble and issue the RFP process for ERP solutions. Panorama will assist with RFP content.
5. Only one RFP process is envisioned for the assessment and selection project. It is assumed that no additional RFPs will be necessary to provide the solution desired by the City.
6. No more than three (3) vendors will be short-listed to participate in software demonstrations.
7. Vendor demonstration duration will be no longer than 12 hours (for each vendor).
8. One Panorama staff member will provide support during the vendor demos.
9. The City will be responsible for the preparation of any business case or ROI model, if desired. Panorama will supply Total Cost of Ownership information. Any quantification of benefits will be the responsibility of the City.
10. If the City desires to conduct reference calls or visits for any solutions proposed by vendors, they will do so without Panorama assistance on those calls or visits.
11. The proposed project timeline assumes City stakeholder availability for participation when needed. Scheduling limitations may lead to project delays.
12. Panorama assumes the City will review deliverables on a timely basis. Delays in deliverable reviews may also lead to project delays.
13. Panorama time for management and administration is a function of project duration. We have proposed a 21-week assessment and selection project with management and administration time for that time period built in to the pricing. Any delays caused by limitations in City personnel or vendor availability that cause the project to be extended in duration may lead to additional fees for management and administration.
14. Panorama’s pricing assumes the following travel for team members. Any additional trips will be invoiced separately:

On-Site Visit	Number of Panorama team members	Assumptions
Trip 1 - City Leadership Session, Business Process Workshops	3	Travel to Superior, MN. Assumes City Leadership and Business Process Workshops can be scheduled in the same week (requiring one trip); sessions not able to be scheduled in that one week will be conducted remotely.
Trip 2 - Demo #1	1	Travel to Superior, MN. Assumes one demo (duration of 1.5 days, scheduled concurrently) that week.
Trip 3 - Demo #2	1	Travel to Superior, MN. Assumes one demo (duration of 1.5 days, scheduled concurrently) that week.
Trip 4 - Demo #3	1	Travel to Superior, MN. Assumes one demo (duration of 1.5 days, scheduled concurrently) that week.

Proposed Cost: Implementation Project

Organizational Change Management

Panorama works on a Time & Materials (T&M) basis. Estimated fees are provided in this proposal based on the hours expected to be expended by each resource and their corresponding billing rates. Based on the estimated hours outlined in the sub-section below, our estimate of professional fees for this project is \$45,945.00.

Organizational Change Management: OCM Deliverables

Phase	Activity	Task	Deliverable	Estimated Total Hours	Estimated Fees	Estimated Travel Fees	
OCM Deliverables	Readiness - Leadership Alignment Assessment	Assessment Planning		5	\$1,375.00	\$0.00	
		Leadership Interviews		18	\$4,800.00	\$0.00	
		Steering Committee Interviews		12	\$3,240.00	\$0.00	
		Readiness Assessment Report	Leadership Alignment Assessment Report	9	\$2,455.00	\$6,000.00	
	Training Strategy	Vendor SOW Review		3	\$800.00	\$0.00	
		Training Plan Development		4	\$990.00	\$0.00	
		Performance Coach Workshop		10	\$2,640.00	\$0.00	
		Development Plan Creation	Development Plan by Occupation	16	\$4,320.00	\$0.00	
		Final Training Plan	Training Plan	6	\$1,620.00	\$0.00	
	Strategic Communication	Vendor SOW Review		2	\$575.00	\$0.00	
		Identify Key Communication Vehicles		3	\$800.00	\$0.00	
		Identify Key Messages		9	\$2,260.00	\$0.00	
		Create Communication Plan Template	Communication Plan	12	\$3,000.00	\$0.00	
	Change Pulse Assessment	Create Key KPI's to measure		10	\$2,770.00	\$0.00	
		Build KPI Templates		8	\$2,060.00	\$0.00	
		Data Collection of KPI Data		24	\$6,240.00	\$0.00	
		Create Change Pulse Report	Change Pulse Report	24	\$6,000.00	\$0.00	
	TOTAL				175	\$45,945.00	\$6,000.00

Implementation Project Management

Panorama works on a Time & Materials (T&M) basis. Estimated fees are provided in this proposal based on the hours expected to be expended by each resource. We are estimating providing Project Management support for between 8 and 16 hours per week (oversight plus some implementation support) for an estimated 52-week implementation plus 8 weeks of Post Go-Live Support (Implementation time will vary based on actual implementation plan from software implementer). Based on the estimated hours outlined in the sub-section above, our estimate of professional fees for this project is \$103,200 to \$206,400. We anticipate most of the work will be performed remotely, but we estimate an additional \$12,000 in travel costs for as needed travel for important project events such as testing, pilots, Go-Live, and other events as deemed necessary.

In addition to the Project Management Support estimated costs above, below is a diagram from our Public Sector Vendor Team that shows estimated software and services costs from software vendors. It was understood during our call with the City that the City wanted to have an idea of such costs for budgeting purposes so we have provided a range below.

City of Superior - Cost Matrix				
	<u>Estimated Software Cost</u>	<u>Estimated Services Cost</u>	<u>Estimated Total Cost</u>	<u>Notes</u>
Tier 1 Solutions	\$400K - \$800K	\$750K - \$1.25M	\$1.15M - \$2+M	Enterprise applications are complex to configure and maintain
Tier 2 Solutions	\$200K - \$350K	\$250K - \$500	\$450K - \$850K	Mid-market solutions are economical in configuration and offer pre-configured, standard / best practice processes and functions out of the box
Tier 3 Solutions	\$75K - \$150K	\$100K - \$200K	\$175K - \$350K	Lower tier solutions are less flexible in configuration and require internal process change to meet pre-configured / out of the box functions

Assumptions: Project Management/OCM

1. Quote based on 8 to 16 hours per week for project management/oversight for 60 weeks (one year implementation plus 2 months post go-live)
2. We are assuming most of the PM work will be done remote. Travel time and cost applies if we are to come onsite. We have allocated an estimated cost for travel for OCM activities.
3. There will be one person from Client assigned as primary project manager to support work performed by Panorama.
4. We will assume one onsite visit for OCM services, and the rest being conducted remotely.
5. The proposed project timeline assumes Client stakeholder availability for participation when needed. Scheduling limitations may lead to project delays.
6. Panorama assumes the Client will review deliverables on a timely basis. Delays in deliverable reviews may also lead to project delays.
7. Training Development Plans for training assume 8 functional areas.
8. Assumes one performance coach training workshop.

4.6 Subcontractors

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

Enterprise Resource Planning Software Selection Advisory Services

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

	<u>SUBCONTRACTOR</u>	<u>CLASS OF WORK</u>
1)	<u>No Subcontractors will be used to deliver the services to</u>	<u></u>
2)	<u>City of Superior, Wisconsin</u>	<u></u>
3)	<u></u>	<u></u>
4)	<u></u>	<u></u>
5)	<u></u>	<u></u>

Submitted by: COMPANY Panorama Government Solutions, LLC
ADDRESS 2000 S Colorado Blvd., Tower 1, Suite 2000-407 Denver, CO 80222
COMPANY REPRESENTATIVE Z. Vanessa Davison

11. Addenda Acknowledgement (Must be submitted with Proposal)

Enterprise Resource Planning Software Selection Advisory Services

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

Addendum No. 1 Dated April 1, 2024
Addendum No. Dated _____
Addendum No. Dated _____
Addendum No. Dated _____

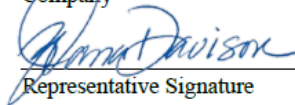
I/we further certify that no agreement has been entered into to prevent competition for said work and that I/we carefully examined the site where the work is to take place, and the plans, specifications, form of contract and all other contract documents.

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

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

Panorama Government Solutions, LLC

Company



Representative Signature

4.7 Statement of Qualifications Reference Form

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

13. Statement of Qualifications Reference Form

Applicant Firm Name: Panorama Government Solutions, LLC

Contact Person: Chris Devault

Address: 2000 S Colorado Blvd., Tower 1, Suite 2000-407

City, State, and Zip Code: Denver, CO 80222

Telephone: 970-420-6563

Reference #1

Owner or Company Name: Town of Apex, North Carolina

Contact Person: Erika Sacco, Information Technology Director

Type of Service(s) Provided: ERP Assessment, Selection, Citizen Engagement Platform transformation, BPM, OCM, Training, Implementation PMO

Calendar Year(s) of Service(s) Provided: 5/26/2021 to present

City, State, and Zip Code: Apex, NC 27502

Telephone: (919) 2429-3312

Reference #2

Owner or Company Name: City of Pembroke Pines, FL

Contact Person: Matthew Kefford, Director of Technology Services

Type of Service(s) Provided: ERP Assessment/Selection, BPM, OCM and IV&V

Calendar Year(s) of Service(s) Provided: 04/15/2017-1/30/2022

City, State, and Zip Code: Pembroke Pines, FL, 81505

Telephone: (954) 392-2061

Reference #3

Owner or Company Name: Seminole Tribe of Florida

Contact Person: Tiffany Mallwitz & Carla Ferrari

Type of Service(s) Provided: ERP Selection for both Health Systems & Financial Management Systems

Calendar Year(s) of Service(s) Provided: 3/1/2019 - Present

City, State, and Zip Code: Hollywood, FL 33024

Telephone: (954) 966-6300 x 11541 and (954) 966-6300 x 11334

Panorama Government Solutions hereby agrees to fully indemnify and hold harmless the above references against any liability for providing comments and opinions.

4.8 Qualification Evaluation Checklist

12. Qualification Evaluation Checklist

Owner: Panorama Government Solutions, LLC

Contact Person: Chris Devault, Senior Manager

Address: 2000 S Colorado Blvd., Tower 1, Suite 2000-407

City: Denver State: CO

Zip: 80222

Telephone: 720-515-1377 ext. 103

Instructions:

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

Yes	Sub	No	#	Question
			1.	How many years has your firm been engaged in the consulting business under the present firm name? <u>19 years</u>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	3.	Has your firm ever defaulted on a contract? Comment/Explanation:
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4.	Has your firm ever had claims filed for errors and omissions or been sued for services you provided? Comment/Explanation:
<input checked="" 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 checked="" 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: We have thoroughly reviewed the service contract attached and are willing to sign similar agreement.

4.9 Statement of Examination

Panorama Consulting Group verifies that we made our own examination, investigation, and research regarding the method of doing the work, all conditions affecting the work to be done, the labor, equipment and materials, and the quantity of the work to be performed. Panorama agrees that we have satisfied ourselves by our own investigation and research regarding all of such conditions, and that Panorama's conclusion to enter into the Service Agreement and based upon such investigation and research, and that Panorama 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.

Verified by: Z. Vanessa Davison

Title: Managing Director

Signed:



Date:

April 9, 2024