



900 SOUTH GAY STREET, SUITE 2102
KNOXVILLE, TN 37902
865.415.3848
averoadvisors.com



**North Central Texas
Council of Governments**

North Central Texas Council of Governments

RFP # 2025-017

Enterprise Resource Planning (ERP
Consultancy Services)

February 25, 2025

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Cover Letter

Dear NCTCOG TXShare Program,

February 25, 2025

North Central Texas Council of Governments (NCTCOG) has a long track record of offering high-quality services to its residents, and Avèro Advisors is thrilled at the prospect of joining your team on the **Enterprise Resource Planning (ERP) Consultancy Services** endeavor. You need an experienced partner with superior technical abilities and business acumen in order for this project to succeed. Avèro Advisors is here as a partner and advisor to guide you through each step of the project journey so that your organization can experience the success it deserves. With the guidance of our firm, your organization will have the opportunity to experience an optimal ERP environment, resulting in clear benefits for both your staff and your residents.

Avèro Advisors is dedicated to transforming the way public sector organizations operate internally and interact with their local communities. Our holistic approach provides tailored solutions that use resources efficiently and cost-effectively, while still delivering desired outcomes for our clients. As evidenced by our firm's successful collaborations over many years, we are dedicated to building long-term relationships with our clients – relationships built on trust, respect, and a shared vision for the future – and take pride in being part of their journeys toward success. This proposal showcases how we succeed in modernizing the technology environments of government organizations across the country.

Our team possesses expertise in delivering information technology (IT) and cybersecurity assessments, IT strategic plans (ITSPs), business process analysis and redesign, requirements definition, request for proposal (RFP) development, enterprise resource planning (ERP) system evaluation and consultation, and project management support services for various government organizations. You can be confident that we will prioritize the specific needs of your organization because our firm is a 100% independent third-party consulting firm with no affiliation to software or hardware vendors. Additionally, as a certified Diversity Business Enterprise (DBE) and Minority-Owned Business Enterprise (MBE) in multiple states, we place great emphasis on diversity and equity.

Above all else, our team has a shared commitment to your mission to **“strengthen both the individual and collective power of local governments and to help them recognize regional opportunities, eliminate unnecessary duplication, and make joint decisions.”** We look forward to developing a long-term relationship with you and NCTCOG so that we can help you achieve that mission.

Sincerely,



Megan J. Seaton (Feb 25, 2025 13:21 EST)

Megan Seaton,
Vice President of Strategic Growth
Avèro Advisors

Headquarters | 900 South Gay Street, Suite 2102, Knoxville, TN 37902

West Coast Office | 10396 East Caribbean Lane, Scottsdale, AZ 85255

Phone Number | +1 865.415.3848 Email: mseaton@averoadvisors.com



Certificate of Offeror and Statement of Understanding

1. Addenda acknowledgment and signature of authorized representative

TXShare Your Public Sector Solutions Center

REQUEST FOR PROPOSALS

For

Enterprise Resource Planning (ERP) Consultancy Services RFP # 2025-017

Sealed proposals will be accepted until 2:00 PM CT, Monday, February 5, 2025 and then publicly opened and read aloud thereafter.

Avero Advisors LLC
Legal Name of Proposing Firm

Megan Seaton Vice President of Strategic Growth
Contact Person Title

+1 865.415.3848 mseaton@averoadvisors.com
Telephone Number E-Mail Address

900 South Gay Street Suite 2102 Knoxville, TN 37902
Street Address of Principal Place of Business City/State Zip

900 South Gay Street Suite 2102 Knoxville, TN 37902
Complete Mailing Address City/State Zip

Acknowledgment of Addenda: #1 ☒ #2 ☒ #3 ☐ #4 ☐ #5 ☐

By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore, that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.



Authorized Signature
Megan J. Seaton (Feb 25, 2025 13:21 EST)

2. Statement of Understanding and Scope of Work

Avèro Advisors understands that NCTCOG, through the TXShare Cooperative Purchasing Program, seeks ERP consulting services to assist public sector entities in ERP evaluation, selection, and implementation. We are responding to Category #2 (ERP Research & Preparation), Category #3 (ERP Implementation & Replacement), and Category #4 (Business Process Documentation & Review). Our team will provide strategic ERP consulting, business process reviews, system requirements gathering, vendor evaluation, project management, system configuration, training, and change management.

With extensive experience in public sector ERP consulting, Avèro Advisors is committed to delivering tailored, high-quality solutions that minimize disruptions and optimize workflows. We look forward to collaborating with NCTCOG and TXShare members to provide effective ERP consulting services that align with their needs.

Key Personnel

Avèro Advisors offers a highly qualified team to execute the **ERP Consultancy Services** project for NCTCOG entities with ample experienced staff resources ready to step in if any team member becomes unavailable during the course of the project. Our bench of skilled professionals is always prepared to support and maintain the project's momentum, ensuring that there are no disruptions to service delivery.

Our tenured team is personally invested in ensuring the highest level of service quality. In the event of performance concerns, NCTCOG entities can follow a clear and structured escalation process. All issues will be addressed by the Project Manager, working closely with NCTCOG stakeholders to resolve the matter. Should further escalation be needed, the concern may be elevated to the dedicated Director of Client Success on the project and, subsequently, to the Vice President of Client Success.



ABHIJIT "AV" VEREKAR
PROJECT EXECUTIVE

AV is a certified Project Management Professional (PMP) with a Master of Business Administration (MBA) from Cleveland State University and a Master of Commerce (M.COM.) from Goa University. He has over 15 years of experience serving the public sector as an IT advisory professional. Using his extensive experience leading IT and organizational modernization initiatives with state and local government agencies across the United States, he has helped his clients achieve significant efficiencies through IT strategic planning, cybersecurity, business process redesign, project management, and implementation for various enterprise systems.



ROBERT KORNOVICH
VICE PRESIDENT – CLIENT SUCCESS

Robert is a Certified Public Manager (CPM) through Arizona State University with a Project Management Certificate and a Bachelor of Arts (BA) from Arizona State University. He has over 20 years of experience providing IT strategic planning services, organizational development services, and system implementation services to public sector clients. He is a subject matter expert on ERP vendors and their product offerings, customer service improvement, and the alignment of people, processes, and technology to maximize organizational resources and funding.



KRISTA PIZZURRO
DIRECTOR – CLIENT SUCCESS

Krista Pizzurro has over 20 years of experience in technology, which includes consulting services, specializing in large-scale program implementation, revenue optimization, and high-performing team leadership across both private and public sectors. She has successfully improved operational efficiency, streamlined cross-functional collaboration, and led strategic initiatives that enhance customer success and professional services. Krista has played a key role in executive leadership, scaling business operations, and driving customer-focused transformations. Her expertise spans multiple industries, where she has delivered impactful solutions that fuel growth, efficiency, and long-term success.



CARY TAPSCOTT
DIRECTOR – CLIENT SUCCESS

Cary Tapscott completed his Bachelor of Science in Business Administration & Marketing followed by an MBA in Strategic Leadership from the University of Tennessee, Knoxville. His extensive experience spans various industries including legal electronic discovery and healthcare, where he has demonstrated exceptional prowess in large-scale project management, data privacy, and innovation. Cary has significantly reduced costs and improved efficiencies for multiple companies, saving millions through strategic policy implementations and technology solutions. His leadership extends beyond projects; Cary actively participates in executive leadership teams and has been instrumental in driving substantial client development.



BRIAN WINCHESTER
DIRECTOR – CLIENT SUCCESS

Brian is a highly accomplished Director with a demonstrated track record of success in project design, execution, and process improvement, particularly in HR and technology integration. With extensive experience at notable companies like I-CAR and Wells Fargo, he has consistently delivered projects that enhance productivity and reduce costs, achieving impressive key performance indicators and cost savings well above targets. At Paychex Incorporated, he significantly enhanced customer experience and operational efficiency, leading major initiatives that drove substantial increases in productivity and customer satisfaction metrics. His leadership in deploying new systems and reengineering business processes has been pivotal in scaling operations and managing risk effectively. Brian's expertise is

supported by a Lean Six Sigma Black Belt certification and a solid educational foundation in Business Management from the Rochester Institute of Technology.



MARCUS HARRIS
ERP CONTRACTS ATTORNEY

Marcus is a partner at Taft Stettinius & Hollister LLP firm and has established one of the country's leading practices devoted to drafting and negotiating Enterprise Software related licenses, implementation and SaaS agreements, as well as litigating failed software implementations in courts and before arbitration panels across the country. He is one of the foremost attorneys in the country representing government entities, distributors and manufacturers in recovering damages arising out of failed Enterprise Resource Planning (ERP) software implementations. As a former in-house attorney at some of the largest software companies in the world, Marcus understands software vendor tactics and is able to leverage his ERP industry knowledge to advocate on behalf of his clients. He frequently speaks on emerging technology related issues and is interviewed regularly by the media.



MIKE COLE
PUBLIC SAFETY SUBJECT MATTER EXPERT

Commander (Retd.) Mike Cole has a Master of Public Administration degree in Leadership and a bachelor's degree in human resources management in addition to associate degrees in Marketing, Management, and Administration of Justice. He has 34 years of law enforcement experience. As a Commander, he was responsible for the implementation and maintenance of all technology for the department. He taught Supervision and Leadership at Arizona POST for ten years and played a pivotal role in the development of a formal mentorship program for the Paradise Valley Police Department. Commander Cole is also a recognized leader in public safety and provides training and technical assistance to law enforcement agencies across the country. He understands the transformative impact technology can have on public sector organizations is committed to helping them adopt new technologies that will improve public safety.



PATRICK MCVERRY
SENIOR PROJECT MANAGER

Patrick completed his Master of Management from George Mason University. He has experience in fast-paced, client-facing roles in business consulting, demonstrating strong organizational, communication, and critical thinking skills. Since joining Avèro Advisors, he has served as a critical team member on a variety of ERP and IT-related projects with municipalities, housing authorities, school districts, and water districts.



KLAY BROOKS
SENIOR CONSULTANT

Klay is a business technology specialist with a proven track record in software consultancy and implementation management. A charismatic leader and active volunteer committed to ethical practices, Klay has driven digital transformation in private, public, and nonprofit organizations. Leveraging a deep understanding of technology, business processes, and organizational dynamics, Klay ensures that project goals are achieved in alignment with strategic vision by effectively engaging stakeholders at every level. They graduated Summa Cum Laude from the University of Tennessee Knoxville with a B.A. in Anthropology.



JEREMY SEEDERS
SENIOR CONSULTANT

Jeremy brings a rich blend of business analytics and programming expertise to our team. With an MBA from Lincoln Memorial University and a summa cum laude degree in Business Analytics, Jeremy excels in leveraging data to drive strategic decision-making. Jeremy's hands-on experience with Python, SQL, and data analytics allows him to effectively communicate with IT teams, tackle ad-hoc programming tasks, and deeply understand the process of converting and migrating data as part of enterprise software implementation projects. Coupled with his MBA, Jeremy is an invaluable asset to any project team, seamlessly integrating technical expertise with strategic insight.

Proposed Project Team

To ensure continuity of service and foster quality relationships, we strive to maintain a dedicated Avèro Project Team that is involved in the project from kick-off to completion. This approach guarantees consistency in project delivery and a deep understanding of the County's specific needs. We have provided each project team member's resume on the pages that follow.

North Central Texas Council of Governments



Professional Services for CAD Evaluation and Implementation Key Stakeholders



KLAY BROOKS
Senior Consultant



PATRICK MCVERRY
Senior Project Manager
(Primary Point of Contact)



JEREMY SEEDERS
Senior Consultant



ABHIJIT "AV" VEREKAR
Project Executive



KRISTA PIZZURRO
Director of Client Success



ROBERT KORNOVICH
VP of Client Success

ABHIJIT VEREKAR

FOUNDER AND CEO

PROFESSIONAL SUMMARY

Abhijit "AV" Verekar is a certified Project Management Professional (PMP) with a Master of Business Administration (MBA) from Cleveland State University and a Master of Commerce (M.COM.) from Goa University. He has over 15 years of experience serving the public sector as an IT advisory professional. Using his extensive experience leading IT and organizational modernization initiatives with state and local government agencies across the United States, he has helped his clients achieve significant efficiencies through IT strategic planning, cybersecurity, business process redesign, project management, and implementation for various enterprise systems.

AVÈRO ADVISORS CLIENTS

City of Alcoa, TN	City of Scranton, PA	Cambridge Housing Authority, MA
City of Charlottesville, VA	City of Show Low, AZ	Hillsborough County Public Schools, FL
City of Dania Beach, FL	City of Wilsonville, OR	Knoxville's Community Development Corporation, TN
City of Dixon, CA	Blount County, TN	Legal Aid of Nebraska, NE
City of Lethbridge, Alberta	Knox County, TN	Maricopa Association of Governments, AZ
City of Macedonia, OH	Mendocino County, CA	Nashville Record Pressing, TN
City of Manassas Park, VA	Monroe County, NY	Nevada Rural Housing, NV
City of Maricopa, AZ	Pittsylvania County, VA	Reno Housing Authority, NV
City of Maryville, TN	Union County, NC	Santa Clara County Housing Authority, CA
City of Mequon, WI	Town of Estes Park, CO	Susquehanna Area Regional Airport Authority, PA
City of Niagara Falls, NY	Town of Farragut, TN	Tulsa Airports Improvement Trust, OK
City of Piqua, OH	Town of Payson, AZ	Valley Regional Transit, ID

SKILLS

Contract Negotiations	Enterprise System Evaluation, Selection, and Implementation
GIS Strategic Planning	Business Process Analysis and Redesign
IT Strategic Planning	Requirements Definition
Project Management	Large Language Models and Machine Learning

CERTIFICATIONS AND EDUCATION

Project Management Professional - Certification No. 1338765 - Project Management Institute
 Master of Business Administration, Finance - Cleveland State University (Cleveland, OH)
 Master of Commerce, Accounting and Finance - Goa University (Goa, India)
 Bachelor of Commerce - Goa University (Goa, India)

ROBERT KORNOVICH

VICE PRESIDENT – CLIENT SUCCESS

PROFESSIONAL SUMMARY

Robert Kornovich is a Certified Public Manager (CPM) through Arizona State University with a Project Management Certificate and a Bachelor of Arts (BA) from Arizona State University. He has over 20 years of experience providing IT strategic planning services, organizational development services, and system implementation services to public sector clients. He is a subject matter expert on ERP vendors and their product offerings, customer service improvement, and the alignment of people, processes, and technology to maximize organizational resources and funding.

AVÈRO ADVISORS CLIENTS

City of Alcoa, TN	City of Scranton, PA	Cambridge Housing Authority, MA
City of Dania Beach, FL	City of Show Low, AZ	Hillsborough County Public Schools, FL
City of Dixon, CA	City of Wilsonville, OR	Knoxville's Community Development Corporation, TN
City of Lethbridge, Alberta	Blount County, TN	Legal Aid of Nebraska, NE
City of Macedonia, OH	Knox County, TN	Maricopa Association of Governments, AZ
City of Manassas Park, VA	Monroe County, NY	Nevada Rural Housing, NV
City of Maricopa, AZ	Pittsylvania County, VA	Reno Housing Authority, NV
City of Maryville, TN	Union County, NC	Santa Clara County Housing Authority, CA
City of Mequon, WI	Town of Estes Park, CO	Susquehanna Area Regional Airport Authority, PA
City of Niagara Falls, NY	Town of Farragut, TN	Tulsa Airports Improvement Trust, OK
City of Piqua, OH	Town of Payson, AZ	Valley Regional Transit, ID

SKILLS

Enterprise System	Evaluation, Selection, and Implementation
GIS Strategic Planning	Business Process Analysis and Redesign
IT Strategic Planning	Customer Service Experience Management
Project Management	Project Roadmap and Comprehensive Visioning

CERTIFICATIONS AND EDUCATION

Certified Public Manager – Arizona State University (Tempe, AZ)
 Project Management Certification – Arizona State University (Tempe, AZ)
 Member of IACP (International Association of Chiefs of Police)
 Member of ICMA (International City/County Management Association)
 Bachelor of Arts, German – Arizona State University (Tempe, AZ)

KRISTA PIZZURRO

DIRECTOR – CLIENT SUCCESS

PROFESSIONAL SUMMARY

Krista Pizzurro has over 20 years of experience in technology, which includes consulting services, specializing in large-scale program implementation, revenue optimization, and high-performing team leadership across both private and public sectors. She has successfully improved operational efficiency, streamlined cross-functional collaboration, and led strategic initiatives that enhance customer success and professional services. Krista has played a key role in executive leadership, scaling business operations, and driving customer-focused transformations. Her expertise spans multiple industries, where she has delivered impactful solutions that fuel growth, efficiency, and long-term success.

AVÈRO ADVISORS CLIENTS

- Shenandoah County, VA
- Fair Oaks Ranch, TX
- City of Manassas Park, VA
- City of Winston-Salem, NC
- Fort Worth Housing Solutions, TX

SKILLS

Strategic Planning	Digital Transformation
Resource Allocation	Customer-focused growth strategies
Project Management	Change management and organizational transformation
Strategic Initiatives	Professional services and consulting delivery
Executive leadership and stakeholder management	

CERTIFICATIONS AND EDUCATION

- Certified Professional Scrum
- Enterprise Design Thinking – Team Essentials for AI – IBM
- Enterprise Design Thinking Practitioner – IBM
- Revenue Operations & Sales Enablement Certification – HubSpot

PATRICK MCVERRY

SENIOR PROJECT MANAGER

PROFESSIONAL SUMMARY

Patrick McVerry completed his Master of Management from George Mason University. He has experience in fast-paced, client-facing roles in business consulting, demonstrating strong organizational, communication, and critical thinking skills. He is known for his problem-solving abilities, helping others, and working effectively with organizations to meet their needs. Since joining Avèro Advisors, he has served as a critical team member on a variety of projects with municipalities, housing authorities, school districts, and water districts.

AVÈRO ADVISORS CLIENTS

City of Dixon, CA
Washoe County School District, NV
Rancho California Water District, CA
Town of Estes Park, CO
Marion County Housing Authority, OR
City of Knoxville Police Department, TN
City of Niagara Falls, NY
City of Mequon, WI

SKILLS

Business Process Analysis and Redesign
Data Validation and Verification
Enterprise System Evaluation, Selection, and Implementation
Business Analytics
Requirements Definition
Problem-Solving
Leading Teams
Public Speaking
Active Listening

CERTIFICATIONS AND EDUCATION

Master of Management, School of Business – George Mason University (Fairfax, VA)
Bachelor of Arts, Politics – University of Virginia (Charlottesville, VA)

KLAY BROOKS

SENIOR CONSULTANT

PROFESSIONAL SUMMARY

Klay Brooks completed their Bachelor of Arts from the University of Tennessee, Knoxville. Klay is a business technology implementation specialist with a proven track record in software consultancy and project management. Klay is highly attentive to detail, with expertise in data manipulation and ensuring client systems operate beyond expectations. A charismatic leader committed to ethical practices, Klay has successfully overseen numerous software implementation projects, managed key account groups, and enhanced customer experience through innovative solutions. A systems-oriented thinker, Klay makes sure their clients receive tailored solutions that align with their organization's overall strategic vision.

AVÈRO ADVISORS CLIENTS

City of Altus, OK
City of Niagara Falls, NY
Rancho California Water District, CA
Valley Regional Transit, ID
City of Knoxville, TN
Washoe County School District, NV
Knoxville Police Department, TN

SKILLS

Data Validation and Verification
Enterprise Software Implementation
Accounting Software Setup
Banking and Payments Integrations
Project Management
IT Troubleshooting
Software Training
Leading Teams
Web Design

CERTIFICATIONS AND EDUCATION

Bachelor of Arts, Anthropology - University of Tennessee, Knoxville (Knoxville, TN)

JEREMY SEEDERS

SENIOR CONSULTANT

PROFESSIONAL SUMMARY

Jeremy Seeders is a skilled business analyst and programmer with a strong background in business analytics and computer science. He earned his MBA from Lincoln Memorial University, adding to his academic achievements, which include a summa cum laude Bachelor of Science in Business Analytics from Maryville College. With extensive experience in Python development, website analytics, database migrations, Jeremy brings a well-rounded technical and analytical skill set to his consulting work. His meticulous approach and problem-solving abilities make him a valuable asset in optimizing processes and delivering data-driven insights.

AVÈRO ADVISORS CLIENTS

City of Knoxville, TN

Blount County, TN

Valley Regional Transit, ID

City of Altus, OK

Monroe County, NY

Blount County Schools, TN

Rancho California Water District, CA

SKILLS

Project Execution

Business Strategy

SQL and Data Analysis

Power BI

Python Programming

Process Optimization

CERTIFICATIONS AND EDUCATION

Master of Business Administration, Lincoln Memorial University (Harrogate, TN)

Bachelor of Science, Business Analytics, Minor in Computer Science – Maryville College (Maryville, TN)

AWARDS

Outstanding Achievement in Statistics Award, Presidential Scholar

References

Avèro Advisors has an established track record of success in modernizing the operations of public sector organizations. Our firm is skilled in ERP system evaluation, solicitation, and implementation project management. This is evidenced by the **five (5)** client references below and their respective case studies on the following pages.

Client References		
CLIENT	CONTACT	PROJECT
FORT WORTH HOUSING AUTHORITY SOLUTIONS	Mr. Hector E. Ordonez, CPA., MBA., Vice President, Finance and Administration +1 (817) 333-3421 hordonez@fwhs.org 1407 Texas Street, Fort Worth, Texas 76102	Yardi Conversion Project Manager and Implementation Consulting 08.01.2024 - ONGOING
MONROE COUNTY, NEW YORK	Mr. Robert Franklin, Director of Finance & Chief Financial Officer +1 (585) 753-1107 robertfranklin@monroecounty.gov 50 West Main Street Rochester, NY 14614	ERP Analysis & Implementation Services 02.01.2022 - ONGOING
CITY OF DIXON, CALIFORNIA	Ms. Kate Zawadzki, Finance Director +1 (707) 678-7000 kzawadzki@cityofdixon.us 600 East A Street, Dixon, CA 95620	Project Management Services for Enterprise Resource Planning (ERP) System 05.01.2022 - ONGOING
CITY OF MARYVILLE, TENNESSEE	Mr. Greg McClain, City Manager +1 (865) 273-3401 gmcclain@maryville-tn.gov 400 West Broadway Avenue, Maryville, TN 37801	IT Assessment & Strategic Plan, Business Process Mapping, and ERP Advisory 01.01.2018 - 06.01.2023
BLOUNT COUNTY, TENNESSEE	Mr. Justin McClure, Information Technology Manager +1 (865) 273-5730 jmcclure@blounttn.org 341 Court Street, Maryville, TN 37804	IT Modernization Project, Business Process Mapping & Redesign, and Implementation Support Services (Tyler Munis) 02.01.2016 - ONGOING

Client Case Studies

In this section, we present a selection of client case studies that showcase our expertise and the successful outcomes we have achieved for various public sector organizations. These case studies provide detailed insights into the challenges our clients faced, the solutions we implemented, and the tangible results that followed. Each case study highlights our comprehensive approach, from initial assessment to final implementation, demonstrating our commitment to delivering tailored, effective solutions that meet our clients' unique needs. These examples reflect our dedication to excellence and our ability to drive meaningful improvements through strategic advisory and technology modernization services.

/1

Fort Worth Housing Authority Solutions, Texas

Yardi Conversion Project Manager and Implementation Consulting

Avèro was contracted by Fort Worth Housing Solutions (FWHS) to lead the ERP Yardi Voyager conversion project as the Project Manager and Implementation Consultant. From project initiation, Avèro has driven a strategic and comprehensive approach, beginning with stakeholder registry development, detailed departmental discovery meetings, and mapping current-state processes. Through future-state visioning sessions, Avèro identified inefficiencies and designed workflows optimized for Yardi's advanced capabilities. Deliverables have included a Current-State IT Assessment, a Needs Assessment, and a Business Process Model and Notation (BPMN) Guide to showcase the transformation efforts. Currently, the Avèro team is managing contract negotiations, building future-state process maps, and delivering tailored change management strategies. With a commitment to seamless integration and transparency, Avèro engages with FWHS through consistent communication, detailed weekly Project Status Reports, and proactive risk mitigation. Avèro is guiding FWHS through each project phase to ensure operational excellence and the timely delivery of a cutting-edge ERP solution.

/2

Monroe County, New York

ERP Analysis & Implementation Services

Avèro was contracted by Monroe County, New York to provide ERP analysis services resulting in the replacement of its existing ERP system (SAP). This multi-phased engagement included a thorough review of its existing ERP environment across Enterprise Asset Management, Finance, Human Resources, Information Security, Interface Management, Procurement, and Reporting/Analytics to ensure all the required functionalities were identified. Avèro also assisted the County with the development of an RFP for Financial & Human Resources ERP software. Avèro then assisted the County with the solicitation process and vendor selection in February 2023. We are currently assisting the County with preparing for the implementation of Workday (the selected ERP vendor) and five other vendors:

- ADP – Tax Services

- Cityworks – Work Orders/ Asset Management
- CanAm/Teller – POS
- Sherpa – Budgeting
- Sympro – Treasury

Avèro will serve as the PMO (Project Management Office) for the duration of the County's implementation of all software vendors.

/3

City of Dixon, California

Project Management Services for Enterprise Resource Planning (ERP) System

Avèro was contracted by the City of Dixon, California to provide professional project management & implementation services for the transition from the City's current ERP system (Springbrook) to its new ERP system (Tyler Technologies). The specific modules being implemented are as follows: EnerGov, Executime, Incode (including Utilities Pro), and Parks & Rec. Avèro's Project Team is currently overseeing the implementation of these modules. Our team's project management services for the implementation of the new ERP system includes the following specific activities: system configuration, system integration, system testing, user acceptance testing, end-user testing, Go-Live support, and Post Go-Live support. Avèro's Project Team is meeting regularly with City staff, as well as Tyler Technologies staff, to ensure the success of implementation.

/4

Blount County, Tennessee

IT Modernization Project, Business Process Mapping and Redesign, and Implementation Support Services (Tyler Munis)

Avèro was contracted by Blount County, Tennessee to create a multi-year IT Modernization Strategy and Plan (ITMSP) aimed at updating the County's IT infrastructure (including hardware, software, policies, and processes). Additionally, Avèro's Project Team performed several tasks alongside County staff, including the IT Department, to implement the recommendations provided in the ITMSP. These tasks included conducting an IT Risk Assessment, redesigning the County's website, upgrading the network infrastructure, and virtualizing the server.

Avèro also assisted the County with the replacement of its ERP system (AS400). Our team worked closely with the County to identify existing risks and user needs, review them, and develop redesigned business processes and best practices concerning but not limited to the following areas: Budgeting, IT Services, Payables, Receivables, and Records Management. The redesigned business processes and best practices were

implemented to mitigate gaps between the County's current-state operations and ideal future-state operations for all County departments.

Avèro then defined a comprehensive list of system requirements, developed an RFP for new ERP software, and assisted the County with the ERP system evaluation and selection process. Our team served as a liaison between the County and the selected software vendor (Tyler Technologies) and successfully supported the County in rolling out a new Financial Management Information System (Tyler Munis). During the data configuration and integration project tasks, Avèro ensured that all capabilities that the software vendor proposed were met; and all configuration and integration issues were met with swift response times. Our team is currently serving as the County's Executive Project Manager, including managing day-to-day support services for the Post Go-Live of the new Financial Management Information System, supporting the County with the transition to an updated version of its Human Resources Information System (Ultimate Kronos Group), and assisting the County's IT Department with other initiatives.

/5

City of Maryville, Tennessee

IT Assessment & Strategic Plan, Business Process Mapping, and ERP Advisory

Avèro was contracted by the City of Maryville, Tennessee to create a multi-year IT Modernization Strategic Plan (ITMSP). After Avèro's Project Team conducted an IT assessment to evaluate the current state of the City's IT environment, we developed an ITMSP. The aim of developing the ITMSP was to guide the City in optimizing its IT environment efficiently & cost-effectively and to provide them with clear strategic recommendations.

Additionally, because the City had an outdated Financial & Human Resources ERP system (Harris GEMS) in place & because vendor support of the City's version of Harris GEMS ended in 2018, Avèro was also contracted to provide ERP advisory services to the City. To advise the City about the best next steps to take, our team performed business process analysis across many City departments, including Development Services, Financial Services, Fleet, Human Resources, Public Utilities, and Public Works. This analysis enabled Avèro to identify current limitations and map out the future state of critical business processes. Our team subsequently guided the City through system requirements definition, RFP development, ERP system evaluation, and selection for various enterprise solutions (i.e., Asset Management, Financial, Fleet, Human Resources, and Procurement). Avèro's Project Team assisted the City through contract negotiations with the selected vendors (CSA Software & Tyler Technologies). Avèro is currently serving as the Executive Project Manager for the City, including managing the City's enterprise system implementations.

Qualifications & Experience

Since our founding in 2016, Avèro Advisors has established itself as a premier provider of IT strategic advisory services to public sector organizations nationwide by successfully delivering desired results on time and within budget. Our core offerings include IT infrastructure analysis, cybersecurity and organizational assessments, IT strategic planning, business process analysis and redesign, RFP development, ERP system selection assistance, and ERP system implementation support. By providing these services, we enable our clients to unlock the full potential of both their staff resources and fiscal resources through the optimization of business processes and technology.

Why Avèro Advisors?

/ 1

We do not have any affiliations with software or hardware vendors. We provide an independent analysis devoid of any bias toward any specific technology, platform, vendor, brand, implementor, or manufacturer.

/ 2

Avèro Advisors is an equal opportunity employer and does not discriminate against any person on account of age, race, creed, religion, color, sex, sexual orientation, disability, national origin, marital status, or political affiliation.

/ 3

We have been recognized as one of America's fastest growing companies by Inc. Magazine for the past four years and are certified as a Great Place to Work based on feedback provided by 100% of our employees.

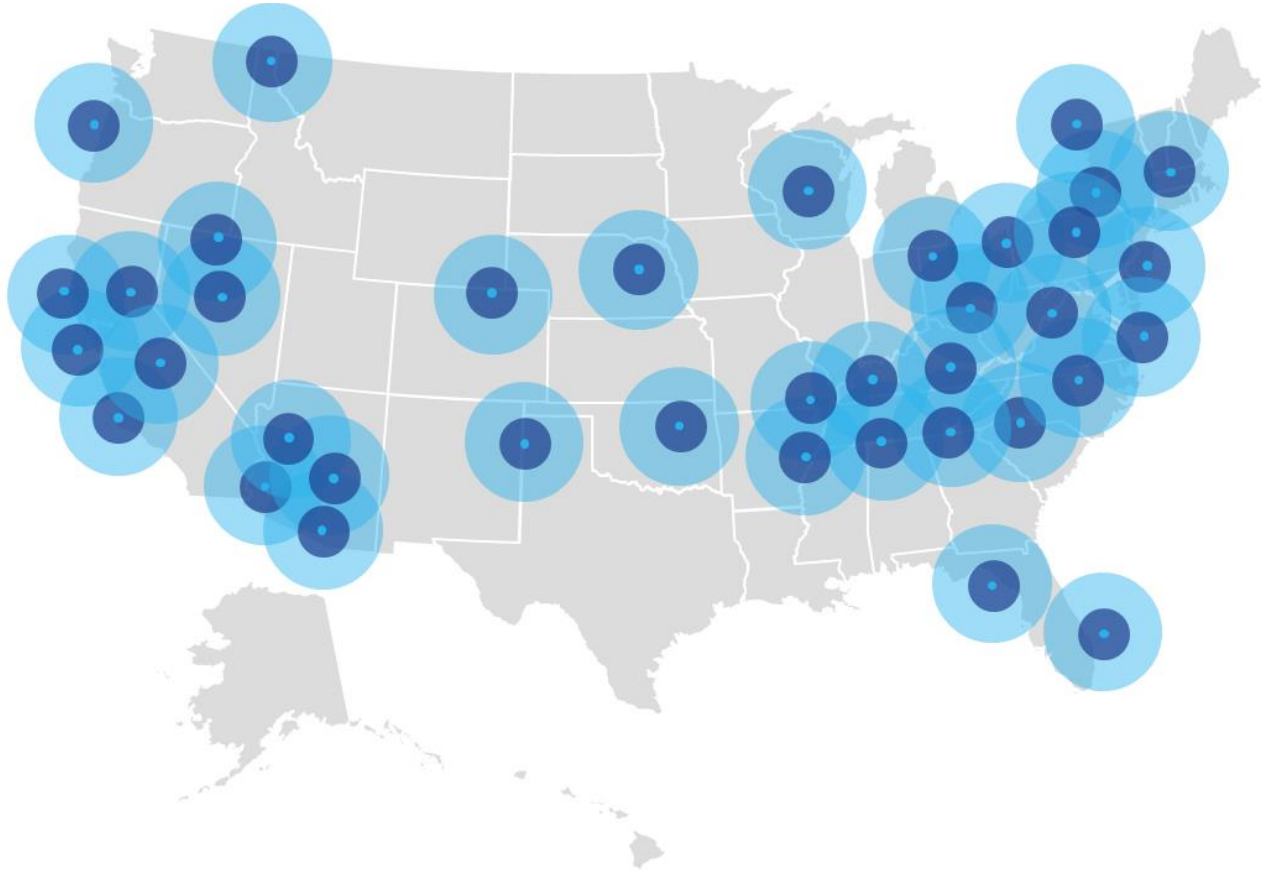
/ 4

Avèro Advisors values diversity, equity, and inclusion. As a certified MBE in the state of Tennessee (#10311804), we recently received the 2024 Minority-Owned Business Excellence Award from the Knoxville (TN) Chamber.

Avèro has completed two projects with us and has another one underway. I find they have two critically important attributes that speak well for them: communication skills and technical knowledge. The Avèro team builds trust and relationships with our staff, enabling comfortable communication about IT issues. By using ordinary English and humor, the Avèro team can speak to different levels including our 'front line' employees, our managers, our IT staff, and our executives because they understand that most people do not speak 'IT.' Their technical knowledge is superb and always beneficial to us. Both of these attributes are critical to successful projection completion.

Terry McKee, IT and Procurement Director
Knoxville's Community Development Corporation, Tennessee

Avèro Advisors is the ideal partner to help government organizations modernize their IT environments by providing strategic technology advice. Our team has a wealth of experience, which enables us to develop strategies that meet both urgent needs and long-term goals. Our team prides itself on being large enough to serve our valued clients yet small enough to know them well. We have employees based across the United States. Our headquarters is in Knoxville, Tennessee, and our West Coast office is in Scottsdale, Arizona, enabling our firm to serve clients across the United States, as shown in the Client Map below.



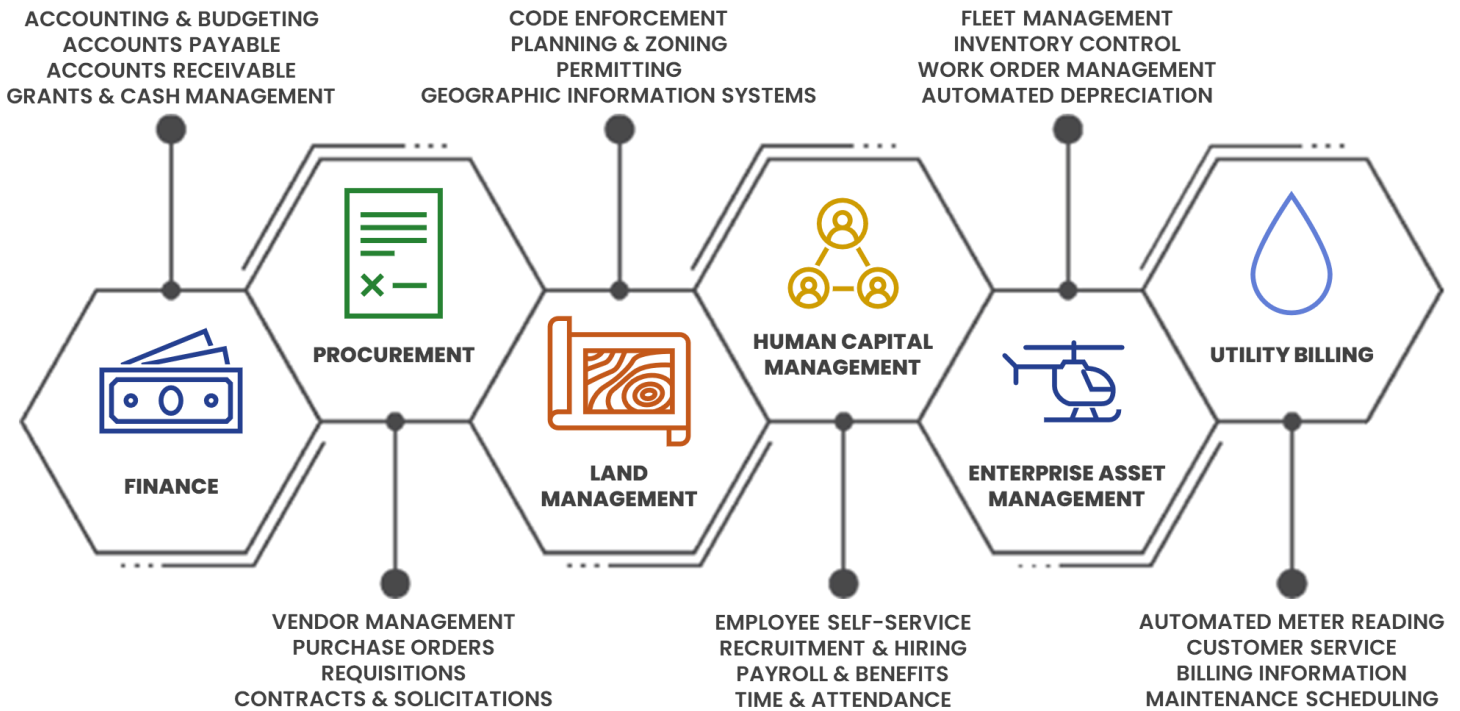
CITY OF MARICOPA, AZ
CITY OF SHOW LOW, AZ
MARICOPA ASSOCIATION OF
GOVERNMENTS, AZ
TOWN OF PAYSON, AZ
CITY OF CARLSBAD, CA
CITY OF DIXON, CA
LAKE COUNTY, CA
MENDOCINO COUNTY, CA
RANCHO CALIFORNIA WATER
DISTRICT, CA
SANTA CLARA COUNTY HOUSING
AUTHORITY, CA
TOWN OF TRUCKEE, CA
TOWN OF ESTES PARK, CO
CITY OF DANIA BEACH, FL
HILLSBOROUGH COUNTY PUBLIC
SCHOOLS, FL

VILLAGE OF INDIANTOWN, FL VALLEY
REGIONAL TRANSIT, ID CAMBRIDGE
HOUSING AUTHORITY, MA
LEGAL AID OF NEBRASKA, NE
NEVADA RURAL HOUSING, NV
RENO HOUSING AUTHORITY, NV
WASHOE COUNTY SCHOOL DISTRICT, NV
CITY OF NIAGARA FALLS, NY
MONROE COUNTY, NY
CITY OF MACEDONIA, OH
CITY OF PIQUA, OH
CITY OF ALTUS, OK
TULSA AIRPORTS
IMPROVEMENT TRUST, OK
CITY OF WILSONVILLE, OR
CITY OF SCRANTON, PA

SUSQUEHANNA AREA REGIONAL
AIRPORT AUTHORITY, PA
BLOUNT COUNTY, TN
CITY OF ALCOA, TN
CITY OF KNOXVILLE, TN
CITY OF MARYVILLE, TN
KNOX COUNTY, TN
KNOXVILLE'S COMMUNITY
DEVELOPMENT
CORPORATION, TN
NASHVILLE RECORD PRESSING, TN
TOWN OF FARRAGUT, TN
TUSCULUM UNIVERSITY, TN
CITY OF CHARLOTTESVILLE, VA
CITY OF MANASSAS PARK, VA
PITTSYLVANIA COUNTY, VA
TOWN OF WARRENTON, VA
CITY OF MEQUON, WI

Municipal ERP System Components

Enterprise resource planning (ERP) systems are software applications that automate core processes.



Vendor Experience

Our clients depend on our unbiased perspective on market trends, solidifying our role as a critical source of information on leading enterprise software vendors' current offerings and future product roadmaps.



Enterprise Systems Clients | Municipalities

CLIENTS SERVED

ENTERPRISE SYSTEM REPLACEMENT SERVICES PROVIDED

MUNICIPALITY Legacy System New System	Needs Assessment	Requirements Definition	RFP Software Selection	Contract Negotiations	Implementation Support	Post-Go-Live Support
CITY OF CHARLOTTESVILLE, VA SAP TBD	✓	✓	✓	✓		
CITY OF DIXON, CA Springbrook Tyler Technologies					✓	
CITY OF MARYVILLE, TN Harris GEMS Tyler Technologies	✓	✓	✓	✓	✓	
CITY OF NIAGARA FALLS, NY N/A Tyler Technologies	✓	✓	✓	✓	✓	✓
CITY OF SCRANTON, PA AS400 OpenGov	✓	✓		✓	✓	✓
BLOUNT COUNTY, TN AS400 Custom Tyler Technologies	✓	✓	✓	✓	✓	✓
KNOX COUNTY, TN Unqork Neighborly					✓	
MENDOCINO COUNTY, CA N/A Accela					✓	
MONROE COUNTY, NY SAP Workday	✓	✓	✓	✓	✓	✓

Enterprise Systems Clients | Government Entities

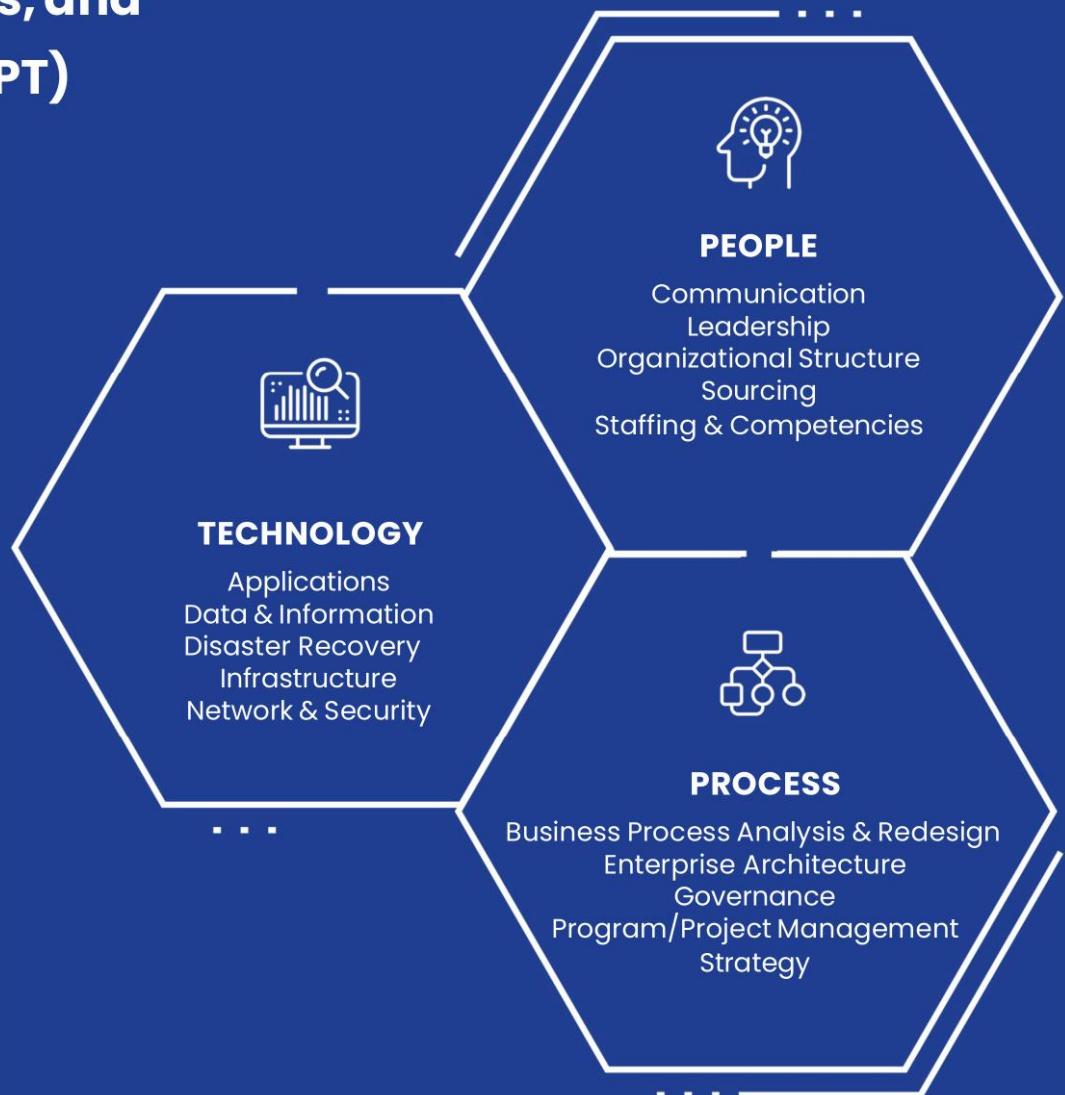
CLIENTS SERVED

ENTERPRISE SYSTEM REPLACEMENT SERVICES PROVIDED

GOVERNMENT ENTITY Legacy System New System	Needs Assessment	Requirements Definition	RFP Software Selection	Contract Negotiations	Implementation Support	Post-Go-Live Support
CAMBRIDGE HOUSING AUTHORITY, MA Emphasys Elite Yardi	✓	✓	✓	✓	✓	✓
HILLSBOROUGH COUNTY PUBLIC SCHOOLS Infor (On-Site) Infor (Cloud)					✓	
KNOXVILLE COMMUNITY DEVELOPMENT CORPORATION, TN Emphasys Elite Yardi	✓	✓	✓	✓	✓	✓
MARICOPA ASSOCIATION OF GOVERNMENTS, AZ Microsoft Dynamics 2012 TBD	✓	✓				
RENO HOUSING AUTHORITY, NV N/A Laserfiche	✓	✓	✓	✓	✓	
SANTA CLARA HOUSING AUTHORITY, CA AS400 Custom Tyler Technologies	✓			✓	✓	✓
KNOX COUNTY, TN Unqork Neighborly	✓	✓	✓			
MENDOCINO COUNTY, CA N/A Accela	✓	✓	✓			
WASHOE COUNTY SCHOOL DISTRICT, NV PowerSchool BusinessPLUS TBD	✓	✓	✓	✓	✓	✓

Approach & Philosophy

People, Process, and Technology (PPT) Approach



Company Philosophy

Our client-centric philosophy is our cornerstone. We are committed to providing advisory services that are a perfect fit for leaders who dedicate their careers to serving their communities.



CLIENT RETENTION

We maintain exceptional relationships with our clients by utilizing the skills necessary to meet their specific needs. Each client reference is a testimonial to our successful track record of providing exceptional service in an efficient and cost-effective manner.



END-TO-END EXPERTISE

We have experience assisting clients from the very beginning of the IT modernization process to the very end. From current-state discovery to vendor selection and implementation support, our team engages our clients to determine what their specific needs are and providing services to meet those needs.



INDEPENDENT AND UNBIASED

We do not have any affiliations with software or hardware vendors. We work on behalf of our clients as trusted advisors, which ensures that our recommendations are not biased toward any specific technology, platform, or vendor.



INDUSTRY-SPECIFIC SUBJECT MATTER EXPERT

We have provided IT strategic planning services, enterprise system assessment services, and project management services for over 18 years. Our extensive experience allows us to genuinely understand clients' business drivers, goals, and challenges so that we can deliver high-quality service to them.



PROFESSIONAL PROJECT MANAGEMENT

We apply industry best practices to every project we execute, including Project Management Institute standards, as well as Agile, Six Sigma and Waterfall methodologies. Using these techniques allows our clients to see impressive results in operational efficiency, quality assurance, and quality control.

Thought Leadership

At Avèro Advisors, we pride ourselves on being at the forefront of public sector innovation, helping government agencies and industry professionals navigate the complexities of modern technology.

CUTTING-EDGE KEYNOTES

Join our CEO, Abhijit “AV” Verekar, at premier industry conferences such as the International City/County Management Association (ICMA) Annual Conference and the Government Finance Officers Association (GFOA) Annual Conference. His insights empower municipal leaders and industry professionals alike, offering strategies for integrating emerging technologies.



EDUCATIONAL INTERVIEWS

Explore our YouTube channel for educational discussions with subject matter experts. Topics include ERP system deployment strategies, cybersecurity practices, and business process reengineering, offering a comprehensive look at how technology can transform public sector operations.



SHARING EXPERT ADVICE

Dive into our LinkedIn. Our posts cover a wide range of topics, including IT modernization, cybersecurity trends, and effective leadership strategies. Engage with our community of professionals to exchange ideas and learn about our latest projects, client success stories, and industry news.



UNTANGLED PODCAST

Tune in to Untangled for discussions on public sector IT trends. Our guests are industry leaders and municipal leaders who are passionate about solutions that optimize government operations. Recent episodes have included topics such as digital transformation in government, the role of data analytics in decision-making, and the future of public sector IT.



Technical Proposal

Our commitment to NCTCOG begins with a deep understanding of your current state and your vision for the future. Instead of offering one cookie-cutter solution, we develop strategies that align with your specific needs and goals. By integrating specialized tools and strategic support where necessary, Avèro Advisors will offer the best **ERP Consultancy** services available on the market today.

We will approach this project, as we do every project, by first focusing on the organization's unique needs. Our assessment of your current situation indicates that NCTCOG, through its TXShare Cooperative Purchasing Program, seeks to provide scalable, high-quality ERP consultancy services to public and nonprofit entities nationwide. Given the diversity of TXShare participants, the ERP services must accommodate a range of system lifecycles, from maintenance and optimization of existing platforms to full-scale ERP replacements. Additionally, the need for process standardization, compliance with evolving regulations, and integration across core functions such as finance, HR, supply chain, and reporting are critical considerations.

Given that NCTCOG requires flexible, cost-effective, and vendor-neutral ERP consulting services that support both pre-implementation planning and full ERP transitions, our primary objective will be to deliver a structured yet adaptable approach that aligns with the unique needs of TXShare participants. This will include in-depth business process reviews, strategic ERP selection support, and seamless implementation management to ensure efficiency, compliance, and scalability.

At Avèro Advisors, we know that ERP consultancy projects are never one-size-fits-all. Thus, we would like to provide an alternative methodology to illustrate the flexibility of a consulting firm that is client-focused and capable of adapting to NCTCOG's needs and desires. The alternative methodology is designed for organizations like NCTCOG or TXShare Entities seeking a strategic approach to ERP implementation. We are responding to **Product Categories #2, #3, and #4**, offering comprehensive services for ERP research, preparation, implementation, and standalone business process reviews. Our approach ensures a seamless transition, future-proofing your ERP system and delivering lasting benefits with meticulous planning, stakeholder engagement, and detailed execution.

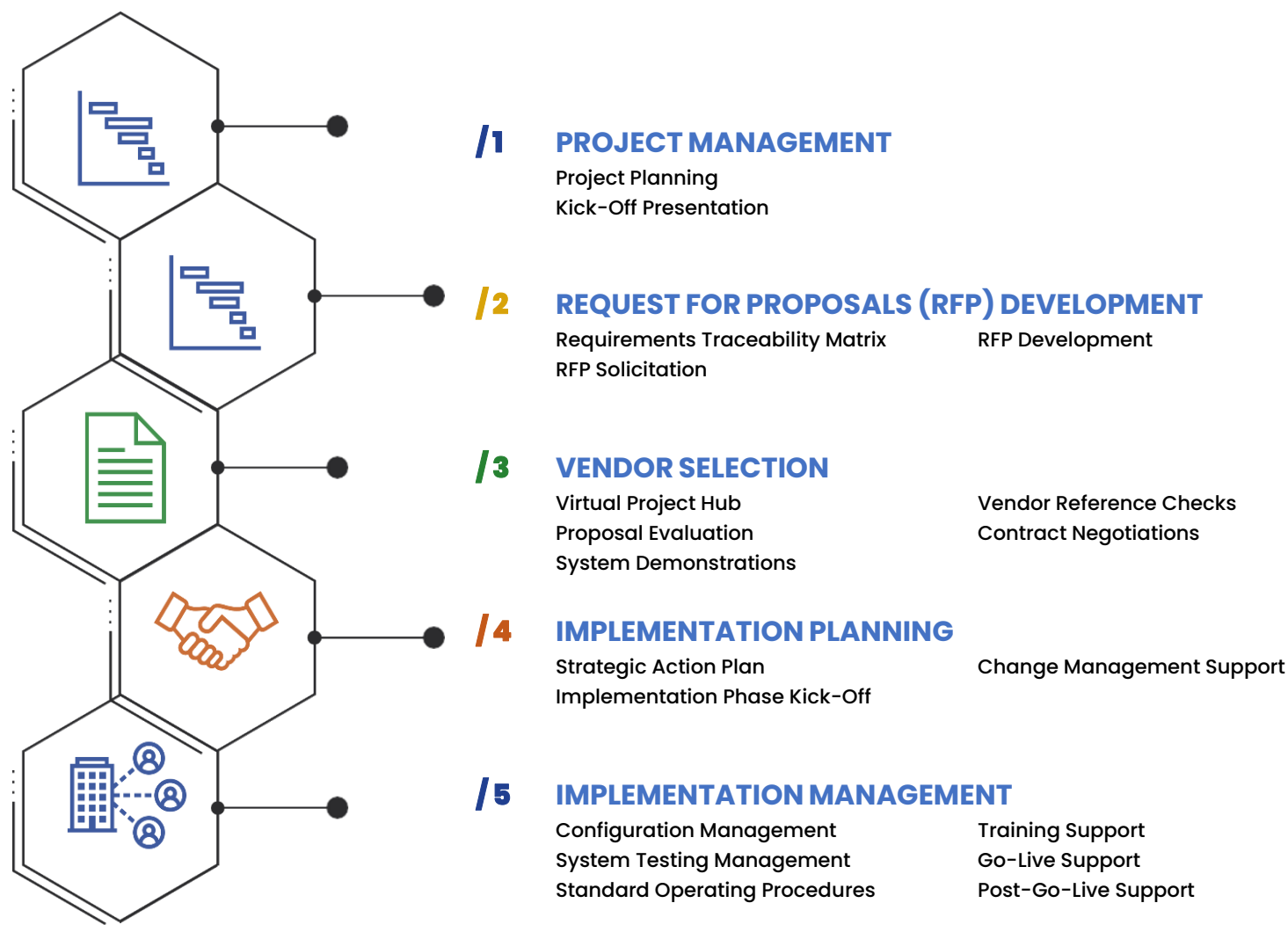
Product Category #2 Project Roadmap

For the organization’s **ERP Consultancy Services** project, Avèro Advisors will draw on our extensive industry expertise and experience to fulfill all the organization’s project requirements. The proposed **Product Category #2 Project Roadmap** below outlines how the Avèro Project Team will deliver the desired project outcomes, leaving room for feedback from the organization’s project sponsors.



Product Category #3 Project Roadmap

For the Organization’s **ERP Consultancy Services** project, Avèro Advisors will draw on our extensive industry expertise and experience to fulfill all the organization’s project requirements. The proposed **Product Category #3 Project Roadmap** below outlines how the Avèro Project Team will deliver the desired project outcomes, leaving room for feedback from the organization’s project sponsors.



Product Category #4 Project Roadmap

For the organization’s **ERP Consultancy Services** project, Avèro Advisors will draw on our extensive industry expertise and experience to fulfill all the organization’s project requirements. The proposed **Product Category #4 Project Roadmap** below outlines how the Avèro Project Team will deliver the desired project outcomes, leaving room for feedback from the organization’s project sponsors.



Additional Strategic Services

At Avèro Advisors, we pride ourselves in our ability to provide the flexibility that NCTCOG needs. Because every project is unique, we are happy to further customize the Organization's project roadmap to suit its needs and desires. We welcome the Organization to request a custom scope of work that includes any of the **Additional Strategic Services** we provide, listed below.

ITSP

IT Strategic Planning

We help organizations develop comprehensive IT strategies to align technology initiatives with business goals, ensuring efficient and effective use of resources.

PMO

On-Call IT Project Management Services

We offer flexible, on-call project management support to help you successfully plan, execute, and complete IT projects on time and within budget.

IMS

Identity Management System Consulting

Our consulting services extend to the assessment and implementation of identity management systems to simplify security, access control, and workflow design.

OCM

Organizational Change Management Consulting

We provide guidance and strategies to help public sector organizations manage and adapt to the changes that accompany technology transitions.

AI

Artificial Intelligence Consulting

Our team provides expert advice on artificial intelligence and how introducing AI-enabled technology to public sector organizations can streamline operations without compromising security or governance.

T&W

Trainings and Workshops

Our experts are equipped to provide engaging hands-on and virtual trainings and workshops to enhance your team's skills and knowledge in various IT and management areas.

SEC

Cybersecurity Assessments

We conduct thorough cybersecurity assessments to identify vulnerabilities, recommend improvements, and help you safeguard your organization against cyber threats.

L&D

Team Leadership and Professional Development

We provide tailored leadership development programs and work planning strategies to enhance team performance and develop professional skills that support organizational goals.

BCP

Business Continuity Planning

We assist organizations in developing and implementing robust disaster recovery and business continuity plans to ensure critical operations can continue in the face of disruptions.

GOV

IT Governance and Compliance

Our services include establishing and maintaining IT governance frameworks. IT governance provides multiple benefits including ensuring compliance with relevant regulations and standards.

Product Category #2

Avèro Advisors understands that not all organizations require in-depth process mapping as part of their ERP research and preparation. Some organizations have a solid understanding of their workflows but need expert guidance in defining system requirements, evaluating available ERP solutions, and preparing for an effective transition.

Our methodology for ERP Research & Preparation (Category #2) is designed to support strategic decision-making by focusing on stakeholder engagement, business process inventory, needs assessment, ERP market evaluation, and implementation planning—without performing detailed process mapping. Process Mapping and Future-State Workflow Documentation are reserved for Product Category #4, where we offer structured process redesign services for organizations seeking more detailed documentation of their ERP workflows.

Project Methodology

/ 1 Project Management

1.1 Project Planning

Our team will conduct project planning activities to prepare for effective communication throughout the project. This project task will include the following:

- List Organization stakeholders who will be involved in this engagement.
- Develop a **Stakeholder Register** of all the relevant Organization stakeholders who will have a role in the current-state discovery process and future-state visioning process.
- Identify roles and responsibilities for Organization leaders for this engagement.
- Discuss the contents of the weekly **Project Status Reports** that will be provided to the Organization's project sponsors.
- Determine a meeting time for the weekly **Project Update Meetings** that will cover the details of the Project Status Reports and be held with the Organization's project sponsors.

1.2 Kick-Off Presentation

Our team will hold a kick-off meeting with the Organization's project sponsors to assimilate project expectations. This project task will include the following:

- Introduce our Project Team for this engagement.
- Present a detailed **Project Work Plan**, including project tasks, goals, timeframes, deliverables, and milestones, and finalize it with feedback and approval of the Organization.
- Answer any questions from meeting attendees.

/ 2 Discovery & Visioning

2.1 Current-State Discovery

Our team will conduct current-state discovery across all relevant Organization departments to gain a comprehensive understanding of the current-state enterprise software environment. This project task will

include the following:

- Collect documents that are transferred within the Organization's current-state enterprise software environment, including policies and procedures.
- Analyze data sources, such as software systems and applications, outside spreadsheets, and information transferred in paper format within the current-state enterprise software environment.
- Develop a **Business Process Inventory** so that we can track departmental processes, process owners, and statuses of the included processes.
- Hold **Current-State Discovery Sessions** with Organization stakeholders identified on the Stakeholder Registry to evaluate the current-state ERP environment through the perspective of staff.
- Determine how they utilize the existing ERP system to perform their job tasks.
 - Understand what they believe the system's pros and cons are.
 - Determine the nature of the data that the system currently holds and how staff interact with that data.
 - Identify current business processes that are executed using the system, what the pros and cons of these processes are, and which of these processes are paper based.

2.2 Future-State Visioning

Our team will conduct future-state visioning across all relevant Organization departments to gain a comprehensive understanding of the ideal future-state ERP environment. This project task will include the following:

- Conduct a best practices review to understand the best practices of similar public sector organizations that have excellent operational practices in place enabled by current technologies.
- Review the marketplace of ERP vendors and products to provide the Organization's project sponsors with exposure to the business process efficiencies created by modern technology.
- Develop an **ERP System Market Analysis** to provide a comparative evaluation of ERP vendors, technology trends, and key differentiators. This analysis will summarize major ERP solutions in the market, highlighting how they align with the Organization's functional and technical needs.
- Hold **Future-State Visioning Sessions** with Organization stakeholders identified on the Stakeholder Registry to understand the ideal future-state ERP environment through the perspective of staff.
 - Determine how they would like to utilize the existing ERP system to perform their job tasks.
 - Understand what they believe the system's capabilities could be.
 - Identify what the Organization's ideal, modernized business processes would look like in the future-state ERP environment.

2.3 Needs Assessment

Our team will develop a thorough Needs Assessment that details the ERP-related needs and desires of the Organization. This project task will include the following:

- Document strengths, weaknesses, opportunities, and threats impacting critical business operations (i.e., a **SWOT Analysis**).
- Document what the current-state finance environment looks like, what the ideal future-state finance

environment looks like, and what the gaps between them are (i.e., a **Gap Analysis**).

- Include any "wish list" functionalities desired in the current system.
- Make recommendations regarding modernization opportunities that will address the challenges present in the Organization's current-state ERP environment.
- Finalize the **Needs Assessment** with the feedback and approval of the Organization's project sponsors.

2.4 Requirements Traceability Matrix (RTM)

Our team will develop a Requirements Traceability Matrix (RTM) that includes the key requirements that the Organization has for a new ERP system. This project task will include the following:

- Hold **Requirements Development Workshops** with the Organization's relevant stakeholders to define the business requirements, functional requirements, integration requirements, and technical requirements of the future system.
- Organize the requirements by module/functional area.
 - Label each requirement according to its priority (critical/desired or high/medium/low).
- Finalize the **Requirements Traceability Matrix (RTM)** with the feedback and approval of the Organization's project sponsors.

Product Category #2 Deliverables

The Avèro project team will make the necessary revisions as requested by the Organization's project sponsors before transferring ownership of the following **Deliverables** to the Organization.

1

Project Management

1. Stakeholder Register

2. Project Work Plan

3. Weekly Project Status Reports

2

Discovery & Visioning

4. Business Process Inventory

5. ERP System Market Analysis

6. Needs Assessment

7. Requirements Traceability Matrix
(RTM)

Product Category #3

Avèro Advisors understands that every organization has unique needs when it comes to ERP implementation. Some organizations have already conducted their discovery and visioning efforts and are ready to execute a well-defined implementation strategy, while others may need additional preparation and process mapping before selecting a system.

Our methodology for ERP Implementation & Replacement (Category #3) is designed for organizations that are prepared to transition from system selection to execution and need structured project management, vendor coordination, system testing, change management, and go-live support to ensure a seamless ERP deployment.

For organizations that require additional discovery and visioning support, we also offer Category #2 (ERP Research & Preparation) to assist with stakeholder engagement, business process inventory, needs assessment, and ERP vendor evaluation before implementation. Likewise, organizations that seek detailed process mapping, workflow documentation, and process optimization can leverage Category #4 (Business Process Documentation & Reviews) to support their transition.

By tailoring our approach to each organization's readiness level, Avèro Advisors ensures that clients can combine multiple service categories to build a comprehensive ERP strategy that fits their specific needs—whether they are starting from scratch, refining their system selection, or ready for full-scale implementation.

Project Methodology

/ 1 Project Management

1.1 Project Planning

Our team will conduct project planning activities to prepare for effective communication throughout the project. This project task will include the following:

- List Organization stakeholders who will be involved in this engagement.
- Develop a **Stakeholder Register** of all the relevant Organization stakeholders who will have a role in the current-state discovery process and future-state visioning process.
- Identify roles and responsibilities for Organization leaders for this engagement.
- Discuss the contents of the weekly **Project Status Reports** that will be provided to the Organization's project sponsors.
- Determine a meeting time for the weekly **Project Update Meetings** that will cover the details of the Project Status Reports and be held with the Organization's project sponsors.

1.2 Kick-Off Presentation

Our team will hold a kick-off meeting with the Organization's project sponsors to assimilate project expectations. This project task will include the following:

- Introduce our Project Team for this engagement.
- Present a detailed **Project Work Plan**, including project tasks, goals, timeframes, deliverables, and

milestones, and finalize it with feedback and approval of the Organization.

- Answer any questions from meeting attendees.

/ 2 Request for Proposal (RFP) Development

2.1 Requirements Traceability Matrix (RTM)

Our team will develop a Requirements Traceability Matrix (RTM) that includes the key requirements that the Organization has for a new ERP system. This project task will include the following:

- Hold **Requirements Development Workshops** with the Organization's relevant stakeholders to define the business requirements, functional requirements, integration requirements, and technical requirements of the future system.
- Organize the requirements by module/functional area.
 - Label each requirement according to its priority (critical/desired or high/medium/low).
- Finalize the **Requirements Traceability Matrix (RTM)** with the feedback and approval of the Organization's project sponsors.

2.2 RFP Development

Our team will assist in the development of a **Request for Proposals (RFP)** for a new ERP system for the Organization. This project task will include the following:

- Help identify critical staff across the Organization's departments to be on the Organization's Selection Committee.
- Develop a draft RFP document.
- Define a set of evaluation criteria that meets the requirements outlined in the pending RFP.
- Hold a review of the RFP document and evaluation criteria with the Selection Committee.
- Revise the RFP document and evaluation criteria based on feedback gained during the review.
- Hold a final review of the RFP document and evaluation criteria with the Selection Committee for finalization and approval.
- Collaborate with the Organization's procurement agent to release the RFP.

2.3 RFP Solicitation

Our team will coordinate with the Organization's Selection Committee to solicit proposals from ERP software vendors. This project task will include the following:

- Coordinate any pre-proposal conference meetings, Q&A sessions, and/or site visits that are needed during the RFP solicitation.
- Review all questions received from vendors and coordinate with the Selection Committee to develop draft responses.
- Develop addenda (if needed) and share/publish appropriately.

/ 3 Vendor Selection

3.1 Virtual Project Hub

A central component of our project management approach is the creation of a Virtual Project Hub. This hub serves as a centralized repository for all project-related information and facilitates real-time communication among project stakeholders. What begins as a tool for distributing materials related to proposal evaluation and vendor selection evolves to become a hub for virtual collaboration throughout the project lifecycle.

Our team will activate the Virtual Project Hub during the Vendor Selection phase of the project to facilitate the process. This project task will include the following:

- Determine the platform that will best integrate with the Organization's current technology environment.
- Customize the hub to include essential project documents, such as vendor evaluation documents, project milestones, and resources from our thought leadership.
- Launch the **Virtual Project Hub** and ensure it is accessible to all relevant stakeholders.
- Train key users on how to access, navigate, and update the hub to maintain real-time communication and document sharing.
- Continuously update the hub as the project progresses, adding new documents, updates, and communication threads to keep all team members informed.
- Provide ongoing support to ensure the hub remains a vital resource throughout the project's lifecycle and in the future.

3.2 Proposal Evaluation

Our team will coordinate with the Organization's selection committee to evaluate the proposals received in response to the RFP. This project task will include the following:

- Provide insight and direction to the Selection Committee during the process of evaluating the proposals received in response to the RFP.
- Provide an **RTM Analysis** document that captures the summary score of each vendor's responses to requirements listed in the RTM.
- Provide **Proposal Evaluation Scorecards** to guide Selection Committee members to conduct a fair and objective evaluation of each proposal.
- Facilitate a finalists determination meeting to determine which vendors qualify for the shortlist based on:
 - The solution's ability to meet the Organization's documented requirements
 - The vendor's overall approach to the implementation project
 - Ability to follow the instructions provided in the RFP
 - Costs related to licensing, implementation, traveling, training, support, and maintenance
 - Any other determining factors defined by the Organization
- Finalize a shortlist of the top three to five vendors who will move to the next round of evaluations.

3.3 System Demonstrations and Vendor Reference Checks

Our team will oversee the interview and demonstration process, as well as the reference checking process, to assist the Organization's Selection Committee with vendor selection. This project task will include the following:

- Facilitate system demos for all the vendors on the Vendor Shortlist.
 - Supply **System Demonstration Scripts** to the vendors that the presenters will follow, ensuring that the most critical requirements from the Requirements Traceability Matrix (RTM) are demonstrated during the presentation.
 - Supply interactive **System Demonstration Scorecards** to the Selection Committee to guide their evaluation of the system demonstrations.
 - Reach out to the shortlisted vendors to schedule on-site or virtual system demonstrations.
 - Be present on-site or virtually during system demonstrations to ensure the Selection Committee understands each system's functionalities, as well as each vendor's work ethic and culture.
- Facilitate reference checks for all the vendors on the Vendor Shortlist.
 - Schedule calls with vendors' ERP system clients, using a quantifiable rubric to score each reference's experience with the solution's effectiveness, the implementation process, and the value their organization has gained from the system.
 - Follow up with references (as needed) to help the Selection Committee gain further insight.
- Maintain documentation of all the final scores given to each vendor from the RTM Analysis, Proposal Evaluation Scorecards, System Demonstration Scorecards, and reference check scores in a comprehensive **Vendor Evaluation Summary Workbook** to aid in the final decision making process.

3.4 Contract Negotiations

Our team will facilitate the contract negotiations process between the Organization and the selected vendor. This project task will include the following:

- Meet with the Organization's Selection Committee once all system demos and reference checks are finished.
- Provide our professional recommendation for the vendor that we believe will fulfill the Organization's requirements and ultimately be the best fit for the Organization.
- Correspond with the vendor(s) to request and secure their Best and Final Offers (BAFO).
- Obtain official approval on vendor selection once the Selection Committee has agreed on a vendor.
- Assist with the presentation for the selection and award of the chosen vendor.
- Review the contract language, Statement of Work, and final pricing.
 - Request modifications (as needed), based on feedback from the Organization.
 - Ensure the Organization reviews and validates the final agreement document.

To support this process, we are proud to include Marcus Harris, a partner at Taft Stettinius & Hollister LLP, as a Subject Matter Expert (SME) on our team. Marcus has established one of the country's leading practices devoted to drafting and negotiating Enterprise Software related licenses, implementation,

and SaaS agreements. His extensive experience includes successfully representing government entities in resolving complex ERP implementation issues, providing contract guidance, and recovering damages from failed software projects. Marcus's unique expertise stems from his role as a former in-house attorney for leading software companies, enabling him to anticipate vendor tactics and advocate effectively for clients.

With Marcus's involvement, the Organization will benefit from proven strategies to ensure the negotiation process results in agreements that are equitable, secure, and aligned with the Organization's long-term objectives. His track record of navigating high-stakes contract negotiations with both public sector clients and major software vendors will provide critical insights and add significant value to this project.

/ 4 Implementation Planning

4.1 Strategic Action Plan

Before the implementation, our team will meet with the selected vendor and key stakeholders representing the Organization to prepare for the ERP system implementation. Our team will create a strategic action plan aligned with Organization requirements. For this task our primary goal is to prepare to guide the Organization seamlessly through the implementation, ensuring that each step is anchored in clarity, efficiency, and a shared vision of transformation that is in alignment with the executive project sponsors' vision for the Organization's future state. This project task will include the following:

- Develop an **Implementation Plan**, which will outline each phase of the implementation, including anticipated costs and timeframes, anticipated staff resources needed, and recommendations for how staff members can balance their current workloads with the workload demands related to implementation.
- Develop a **Communications Plan**, which will include the type of communication, the group that will be communicating with, the purpose of the communication, the frequency of the communication, and the method of communication.
- Plan for providing continuous feedback loops to adjust strategies and respond to challenges.
- Ensure that adequate, qualified staff resources from all project teams will be available to support the Organization, monitoring the rollout of new systems and processes to ensure a smooth transition.

4.2 Change Management Support

Our team will deliver comprehensive change management support using ProSci change management models and best practices from our extensive experience in implementation projects. This project task will include the following:

- Conduct in-person or virtual workshops to educate stakeholders on change management principles and their roles in the process.
- Provide tools and resources to help stakeholders manage change effectively within their teams.
- Offer coaching sessions for leaders to equip them with the skills needed to lead their teams through the transition.
- Establish feedback mechanisms to monitor the progress of change management efforts and make necessary adjustments.

- Empower key stakeholders to become advocates for the new system, fostering a culture of acceptance and enthusiasm.
- Develop a **Change Management Plan**, which will prepare Organization staff using the new software for the changes ahead, set appropriate expectations for these users, and describe how we will manage any resistance identified by these users.

4.3 Implementation Phase Kick-Off

Our team will mark the inception of the implementation phase of the project with a kick-off presentation to engage the Organization's project team, synchronizing expectations and goals, and providing vital information about the next steps in the process of implementing the newly selected ERP system. This project task will include the following:

- Hold a kick-off meeting with representatives from the selected vendor and the Organization's project sponsors to facilitate introductions, assimilate project expectations, answer questions, and present the Implementation Plan, Communications Plan, and Change Management Plan.

/ 5 Implementation Management

5.1 Configuration Management

Our team will coordinate with the Organization and the selected vendor to ensure the success of system configuration and integration. This project task will include the following:

- Ensure that all data, controls and permissions, and workflows are properly configured across all the modules within the new ERP system.
- Ensure that all required software systems are properly integrated with the new ERP system.
- Support the Organization's project team throughout the system configuration and integration process.
- Share all workstream configuration documents with the team utilizing the Virtual Project Hub.

5.2 System Testing Management

Our team will work with the Organization and the selected vendor to ensure the success of system testing. This project task will include the following:

- Ensure the success of data verification and data validation efforts, employing expertise from within the Avèro project team and communicating with Organization stakeholders about the migration and conversion of the data necessary to move to the next phases of system testing.
- Engage in initial system testing in cooperation with the selected vendor.
 - Conduct initial testing on the system's operability and effectiveness.
 - Ensure that the required system functionalities across all modules are operable and that automated workflows are functioning correctly.
 - Document any system requirements that are not executable by our testing team and report them to the vendor for required system maintenance before System Integration Testing and User Acceptance Testing with Organization staff begins.
- Manage System Integration Testing.
 - Work with the selected vendor to schedule testing sessions with the right Organization

stakeholders.

- Be present during the System Integration Testing sessions to document progress and escalate any issues with the vendor team or the software solutions that are uncovered during the sessions.
- Oversee User Acceptance Testing
 - Facilitate the selection of a group of stakeholders for User Acceptance Testing across the Organization's departments to test all system requirements across all modules, in accordance with the Organization's contract with the vendor.
 - Provide **System Test Scripts** to the Organization's testing team with instructions showing what will be performed on the system to ensure that it functions as promised before End-User Training begins.
 - Monitor the user experience regarding system functionalities, system navigation, and automated workflows.
 - Document any system requirements that are not executable by the Organization's testing team and report them to the vendor for required system maintenance before End-User Training with Organization staff begins.

5.3 Training Support

Our team will coordinate with the Organization and the selected vendor to ensure the success of End-User Training. This project task will include the following:

- Provide **Quick Reference Guides** to the Organization's end-user community that include clear, brief instructions for how to use various aspects of the new ERP system – with the goal of introducing tasks to the end-users who will execute them.
- Assist with providing interactive End-User Training to the Organization's end-user community that best meets their training needs.
- Ensure that end-users receive appropriate levels of training, depending on how much they will use the system.
- Schedule subsequent training sessions (as needed) for any end-users who desire them.

5.4 Standard Operating Procedures

Standard Operating Procedures (SOPs) document the best practices and workflows that incorporate the new system's features, making it easier for staff to adapt to changes and perform their tasks efficiently. Clear and detailed SOPs help minimize disruptions, reduce errors, and enhance productivity by providing a reliable reference for all users.

Our team will develop **Standard Operating Procedures** to the Organization's end-user community that include detailed step-by-step instructions for how to use various aspects of the new ERP system – with the goal of enabling end-users to execute their tasks uniformly and efficiently without reverting back to habits that may have been formed as a result of the previous ERP environment. This project task will include the following:

- Collaborate with the vendor and Organization stakeholders to synthesize detailed information about the new system and its applications in the Organization's daily operations.

- Create customized SOPs to reflect the specific needs and workflows of each functional area within the organization.
- Validate the SOPs with stakeholders to ensure accuracy and completeness.
- Train users to utilize the SOPs effectively to navigate the new ERP environment.
- Create an ongoing framework to empower the Organization to update and refine the SOPs as needed, ensuring they remain relevant and effective as the system receives new software updates and the Organization evolves.

5.5 Go-Live Support

Our team will coordinate with the Organization and the selected vendor to provide onsite support during the Go-Live event for each module of the new ERP system. By project managing Go-Live, we will serve as the support liaison between the Organization and the vendor. We will document any issues that Organization staff experience, including any issues related to system functionality, navigation, workflow execution, or integration, and subsequently manage the resolution of all documented issues with the vendor.

Prior to Go-Live, our team will conduct a structured review to ensure the Organization is fully prepared for system deployment. This includes verifying system performance, validating that critical workflows are functioning as intended, and ensuring end-users have received adequate training and support. We will work closely with key stakeholders to confirm that all essential pre-launch activities have been completed, address any outstanding concerns, and mitigate potential risks to minimize disruption during the transition.

5.6 Post Go-Live Support

Our team will coordinate with the Organization and the selected vendor to provide virtual support during the Post Go-Live period. By project managing Post Go-Live, we will continue to act as a support liaison between the Organization and the vendor. For a period of time following the Go-Live event, we will continue to document any issues that Organization staff experience, including any issues related to system functionality, navigation, workflow execution, or integration, and subsequently manage the resolution of all documented issues with the vendor. Furthermore, we will authorize system acceptance for the project closeout and oversee the knowledge transfer of all final project notes and deliverables to the Organization.

Product Category #3 Deliverables

The Avèro project team will make the necessary revisions as requested by the Organization's project sponsors before transferring ownership of the following **Deliverables** to the Organization.

1

Project Management

1. Stakeholder Register

2. Project Work Plan

3. Weekly Project Status Reports

2

RFP Development

8. Requirements Traceability Matrix (RTM)

9. Request for Proposals (RFP)

3

Vendor Selection

10. Virtual Project Hub

11. RTM Analysis

12. Proposal Evaluation
Scoresheets

13. System Demonstration
Scripts

14. System Demonstration
Scoresheets

15. Vendor Evaluation
Summary Workbook

4

Implementation Planning

16. Implementation Plan

17. Communications Plan

18. Change Management
Plan

5

Implementation Management

19. System Testing Scripts

20. Quick Reference
Guides

21. Standard Operating
Procedures

Product Category #4

Avèro Advisors understands that some organizations require a deep dive into their current business processes, workflows, and operational challenges before committing to ERP selection or implementation. These organizations need a structured approach to documenting their processes, identifying inefficiencies, and mapping out a clear vision for their future-state workflows to ensure a smooth transition to an ERP system.

Our methodology for Business Process Documentation & Review (Category #4) is designed for organizations that want to gain clarity on their operational workflows, pinpoint inefficiencies, and establish standardized processes before moving forward with ERP selection or implementation. This service is particularly valuable for organizations that lack comprehensive documentation of their current processes or need to ensure alignment across departments before transitioning to a new system.

For organizations that are ready to move forward with ERP system selection and implementation, we also offer Category #2 (ERP Research & Preparation) to assist with system readiness, vendor evaluation, and RFP development. Likewise, organizations that have completed their process documentation and are prepared for full ERP deployment can leverage Category #3 (ERP Implementation & Replacement) for structured project execution, vendor coordination, and system go-live support.

By offering a standalone process mapping and documentation service, Avèro Advisors ensures that organizations have a comprehensive understanding of their current operations and a clearly defined roadmap for ERP transformation before making critical technology decisions.

Project Methodology

/ 1 Project Management

1.1 Project Planning

Our team will conduct project planning activities to prepare for effective communication throughout the project. This project task will include the following:

- List Organization stakeholders who will be involved in this engagement.
- Develop a **Stakeholder Register** of all the relevant Organization stakeholders who will have a role in the current-state discovery process and future-state visioning process.
- Identify roles and responsibilities for Organization leaders for this engagement.
- Discuss the contents of the weekly **Project Status Reports** that will be provided to the Organization's project sponsors.
- Determine a meeting time for the weekly **Project Update Meetings** that will cover the details of the Project Status Reports and be held with the Organization's project sponsors.

1.2 Kick-Off Presentation

Our team will hold a kick-off meeting with the Organization's project sponsors to assimilate project

expectations. This project task will include the following:

- Introduce our Project Team for this engagement.
- Present a detailed **Project Work Plan**, including project tasks, goals, timeframes, deliverables, and milestones, and finalize it with feedback and approval of the Organization.
- Answer any questions from meeting attendees.

/ 2 Discovery & Visioning

2.1 Current-State Discovery

Our team will conduct current-state discovery across all relevant Organization departments to gain a comprehensive understanding of the current-state enterprise software environment. This project task will include the following:

- Collect documents that are transferred within the Organization's current-state enterprise software environment, including policies and procedures.
- Analyze data sources, such as software systems and applications, outside spreadsheets, and information transferred in paper format within the current-state enterprise software environment.
- Develop a **Business Process Inventory** so that we can track departmental processes, process owners, and statuses of the included processes.
- Hold **Current-State Discovery Sessions** with Organization stakeholders identified on the Stakeholder Registry to evaluate the current-state ERP environment through the perspective of staff.
- Determine how they utilize the existing ERP system to perform their job tasks.
 - Understand what they believe the system's pros and cons are.
 - Determine the nature of the data that the system currently holds and how staff interact with that data.
 - Identify current business processes that are executed using the system, what the pros and cons of these processes are, and which of these processes are paper based.

2.2 Current-State Business Process Mapping

Understanding and documenting current-state business processes is a pivotal step in managing organizational change during ERP implementation. This process not only helps identify specific areas of improvement but also fosters stakeholder engagement and buy-in. By involving end-users from the beginning, we ensure that their insights and concerns are addressed, reducing resistance to change and building a foundation of trust. This prepares all functional area teams for a smooth transition to new processes and technologies while ensuring all team members are aligned and informed.

Our team will develop Business Process Modeling Notation (BPMN) diagrams based on documentation collected and stakeholder feedback gathered during current-state discovery. This project task will include the following:

- Map daily activities to business processes across the Organization's current-state ERP environment.
- Diagram and document current-state workflows.
- Identify inefficiencies, such as bottlenecks and duplications.

- Identify where key business activities or key controls are missing.
- Determine the condition of the existing data and where there is insufficient access to data.
- Determine undefined or poorly defined process ownership responsibilities.
- Validate the **Current-State Business Process Maps** with the Organization's project sponsors.

2.3 Future-State Visioning

Our team will conduct future-state visioning across all relevant Organization departments to gain a comprehensive understanding of the ideal future-state ERP environment. This project task will include the following:

- Conduct a best practices review to understand the best practices of similar public sector organizations that have excellent operational practices in place enabled by current technologies.
- Review the marketplace of ERP vendors and products to provide the Organization's project sponsors with exposure to the business process efficiencies created by modern technology.
- Develop an **ERP System Market Analysis** to provide a comparative evaluation of ERP vendors, technology trends, and key differentiators. This analysis will summarize major ERP solutions in the market, highlighting how they align with the Organization's functional and technical needs.
- Hold **Future-State Visioning Sessions** with Organization stakeholders identified on the Stakeholder Registry to understand the ideal future-state ERP environment through the perspective of staff.
 - Determine how they would like to utilize the existing ERP system to perform their job tasks.
 - Understand what they believe the system's capabilities could be.
 - Identify what the Organization's ideal, modernized business processes would look like in the future-state ERP environment.

2.4 Future-State Business Process Mapping

Gaining an in-depth understanding of future-state business processes is a critical step in envisioning and designing the optimal operational workflows that the new ERP system will support. This process not only highlights the efficiencies and improvements that modernized technology can bring but also deeply involves stakeholders in shaping their future work environment. By facilitating discussions where the Avèro team helps stakeholders identify how their workflows can be streamlined and improved, we ensure they are personally invested in the technology transformation. This investment fosters a sense of ownership and enthusiasm for the new system, significantly enhancing user adoption.

Our team will develop Business Process Modeling Notation (BPMN) diagrams based on documentation collected and stakeholder feedback gathered during future-state visioning. This project task will include the following:

- Identify where bottlenecks, duplications, manual activities, in-house workarounds, unclear ownership responsibilities, and potential legal and compliance risks can be eliminated.
- Determine the positive impact of data integration, workflow automation, and process controls offered by modernized ERP solutions.
- Map daily activities to ideal business processes across the Organization's ideal future-state ERP environment.

- Diagram and document future-state workflows.
- Validate the **Future-State Business Process Maps** with the Organization's project sponsors.

2.5 Needs Assessment

Our team will develop a thorough Needs Assessment that details the ERP-related needs and desires of the Organization. This project task will include the following:

- Document strengths, weaknesses, opportunities, and threats impacting critical business operations (i.e., a **SWOT Analysis**).
- Document what the current-state finance environment looks like, what the ideal future-state finance environment looks like, and what the gaps between them are (i.e., a **Gap Analysis**).
- Include any "wish list" functionalities desired in the current system.
- Make recommendations regarding modernization opportunities that will address the challenges present in the Organization's current-state ERP environment.
- Finalize the **Needs Assessment** with the feedback and approval of the Organization's project sponsors.

Product Category #4 Deliverables

The Avèro project team will make the necessary revisions as requested by the Organization's project sponsors before transferring ownership of the following **Deliverables** to the Organization.



We desire to note assumptions that we used to price the **Implementation** phase of the project:

1. **Complexity of Project Management:** Assumes a certain level of complexity in managing the project, considering unknown variables due to the absence of a selected vendor.
2. **Change Management Effort:** Estimates the degree of change management required based on the organization's size, culture, and adaptability to new systems.
3. **Stakeholder Engagement:** Assumes the need for extensive stakeholder engagement activities to manage expectations and align diverse interests.
4. **Communication Needs:** Assumes a comprehensive communication strategy will be necessary to keep all parties informed and engaged throughout the project.
5. **Training Requirements:** Estimates the extent of training required for users, which can vary depending on the eventual ERP solution chosen.
6. **Vendor Selection Impact:** Considers the potential impact of different vendors on project scope, timeline, and costs, as each vendor may offer different features and implementation support.
7. **Resource Allocation:** Assumes the need for allocation of internal and external resources for the implementation phase, including consultants, IT staff, and user representatives.
8. **Timeline Uncertainties:** Accounts for potential delays and extended timelines due to the unknowns associated with vendor selection and system capabilities.
9. **Risk Management:** Focuses on identifying and preparing for risks specifically related to change management, communication, and project coordination without knowing the vendor specifics.
10. **Feedback and Iteration Processes:** Assumes the need for mechanisms to gather feedback and iterate on change management and communication strategies as the project progresses.
11. **Documentation and Reporting Requirements:** Estimates the level of documentation and reporting needed to track progress and address challenges in the implementation phase.
12. **Alignment with Business Objectives:** Ensures that all PMO, change management, and communication efforts align with the broader business objectives and goals of the ERP implementation.

We are committed to working closely with the Organization to ensure that the project does not exceed the proposed cost. If any project tasks outside the scope of the initial contract arise, they will be billed separately at the individual rates listed in the **Hourly Rate Chart**, upon prior written approval from the NCTCOG & Avèro Advisors. Invoices for completed services will be submitted monthly by Avèro Advisors. We remain flexible in our approach and welcome any feedback for modifications that the Organization may deem necessary.

Appendix A: Work Samples

ERP Assessment and Selection Consulting Services

Town of Collierville, Tennessee

ERP Needs Assessment

Strategic Recommendation

Key Findings

The Tyler New World assessment revealed the following key findings:

1. System Integration Challenges

The assessment identified significant integration challenges between third parties and New World. These issues lead to data silos and inefficiencies in the data flow across systems, resulting in increased manual data entry, the potential for errors, and a lack of real-time data access.

2. Manual Process Reliance

Due to system limitations, many business processes such as time and attendance tracking, payroll, spreadsheets, and manually handle outside of New World. This reliance on manual processes increases the workload on staff, introduces a higher risk of errors, and decreases operational efficiency.

3. Data Availability and Reporting

The configuration of the existing system provides inadequate functionality for critical processes, such as audit history and data access. It hinders productivity due to the manual effort required to collect information that should be readily available in a modern ERP system. For instance, the current financing system lacks a true audit trail, relying heavily on manual processes. Forecasting and reporting are also hindered by the absence of adequate data tracking. The current system also contributes to slow turnover in specific positions.

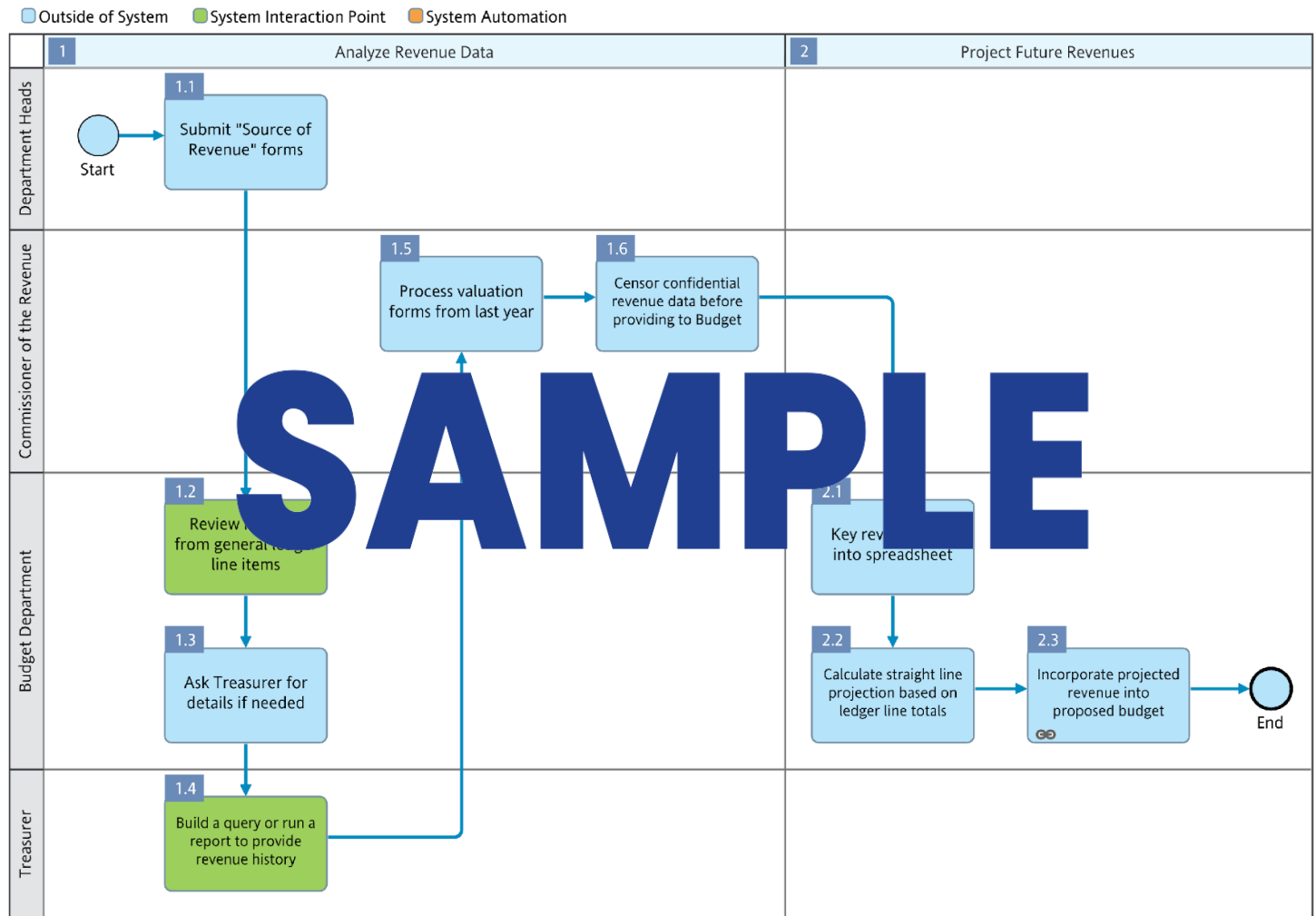
4. System Constraints and Functionality

Continued use of the current system has and will continue to lead to challenges in scalability and flexibility, hindering growth and adaptation to new needs. Growth constraints, rigid architectural design, and integration issues with new technologies lead to operational inefficiencies, slow response times, and significant cost

ERP Consulting Services

Shenandoah County, Virginia

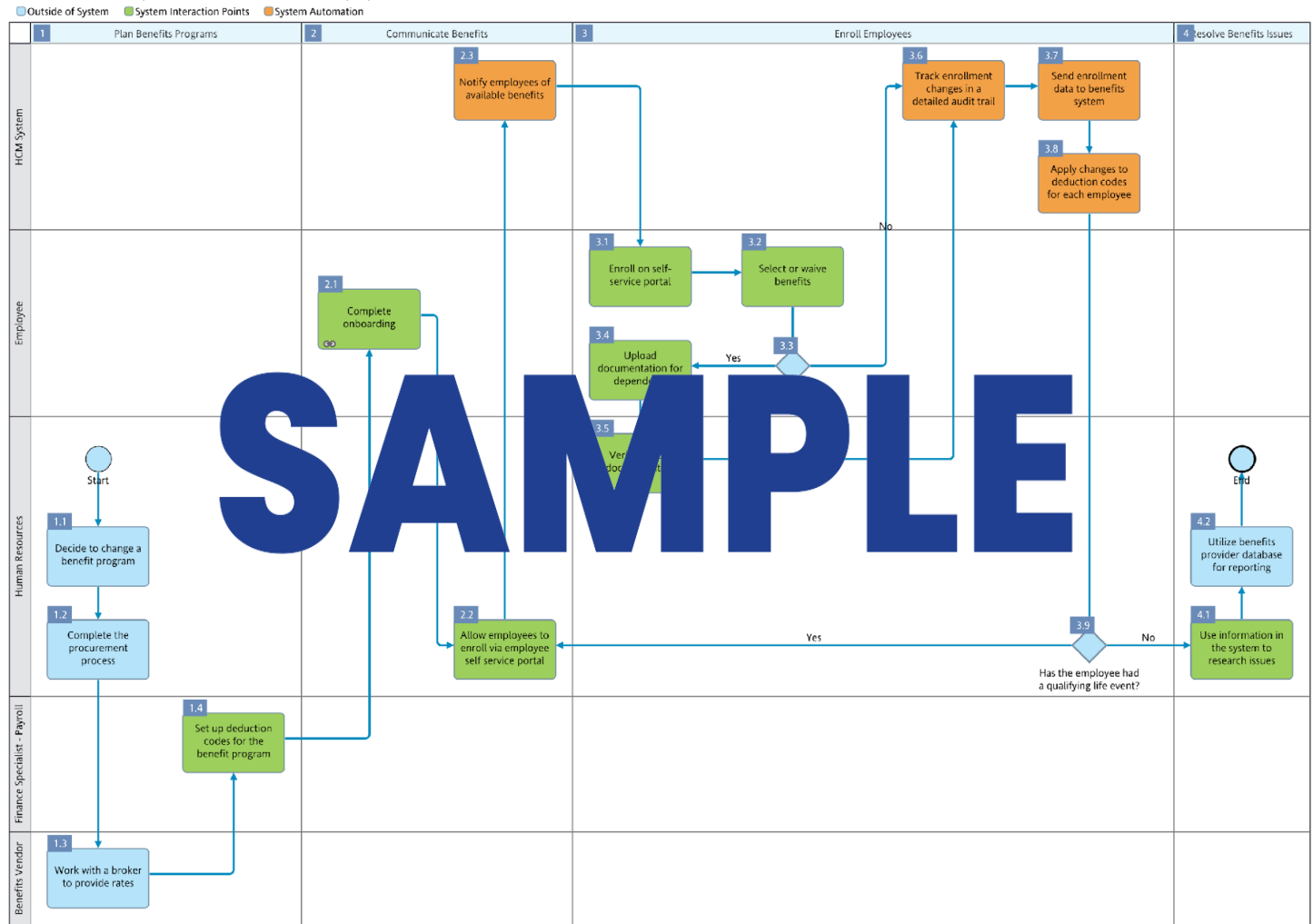
Current State – Revenue Forecasting Business Process Map



ERP Consulting Services

Shenandoah County, Virginia

Future State – Benefits Administration Business Process Map



System Demo Script

Washoe County School District, Nevada

Consulting Services for ERP Pre-Selection Activities, Selection Process, and Conversion

Business and Financial Services	
Student Activity Funds	
Duration: 120 mins	
FIN - 6	Provide an overview of the functionality of the Enterprise Software System related to Student Activity Funds, which includes the following: General Requirements 1. Centralize customer payment processing for over 100 distinct locations. Point of Sale Module 1. Create an item to be sold and link it to a specific account for proper revenue allocation. 2. View and apply payments to Accounts Receivable balances via the point-of-sale module or third-party integration. 3. Accept and process payments via a point-of-sale integration or point of sale module. Cashiering 1. Integrate or provide a seamless cashiering solution. 2. Accept and process payments on-site. 3. Provide reporting on fees associated with processing payments. 4. Support standardized fee schedules and payment options across locations. 5. Charge miscellaneous fees and select the revenue account at the time of sale. Reconciliation 1. Run end-of-day reconciliation in the point-of-sale module/third-party integration for at least one cash, one check, and one credit card transaction. 2. Demonstrate the process of getting the reconciled transactions to show up in the general ledger. Accounts Payable 1. Demonstrate a decentralized expense reimbursement workflow that can be used at the school site level, alerting the proper approver for the requestor. 2. Demonstrate a decentralized procurement workflow that can be handled by the school site directly by virtue of the selected account being a school-specific account rather than a District-wide account.

Quick Reference Guide

Blount County, Tennessee

IT Modernization Project, Business Process Mapping and Redesign, and Implementation Support Services

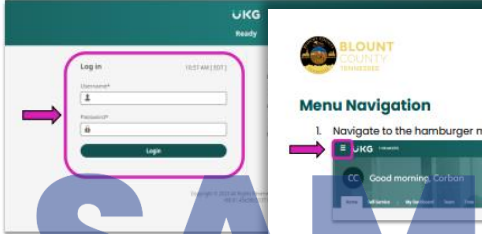



Basic Site Navigation
Quick Reference Guide

Sign-in

Through the Web Browser:

1. Navigation to UKG Ready - <https://secure6.sgaahr.com/ta/6119025/login>
2. Sign in using your County email address and temporary password.
 - a. *The first time you log in, UKG will request that you change your password




Menu Navigation

1. Navigate to the hamburger menu in the upper left corner and expand the menu.
2. A drop-down menu will appear. Under "My Info" you will be able to access information pertaining to you. This is where you can access functions that are specific to you such as your timesheet and your time off requests.







Page | 3

Required Attachments

**ATTACHMENT I:
INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

Compliance with the NCTCOG Standard Terms and Conditions

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 2.2 - General Terms and Conditions.

Name of Organization/Contractor(s):

Megan Seaton

Signature of Authorized Representative:


Megan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

**ATTACHMENT II:
CERTIFICATIONS OF OFFEROR**

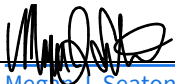
I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.

I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Megan Seaton (typed or printed name) certify that I am the VP of Strategic Growth (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:



Megan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

ATTACHMENT III:

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:


Megan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

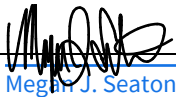
The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:



Meghan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

**ATTACHMENT V:
DRUG-FREE WORKPLACE CERTIFICATION**

The Avero Advisors (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the Avero Advisors (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

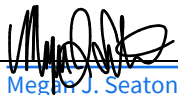
Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:



Megan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

**ATTACHMENT VI:
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST**

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:



Megan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐

Yes

☐

No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐

Yes

☐

No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed;
- or
- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

- (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
- (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

- (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
- (B) that the vendor has given one or more gifts described by Subsection (a); or
- (C) of a family relationship with a local government officer.

**ATTACHMENT VII:
CERTIFICATION OF FAIR BUSINESS PRACTICES**

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

Avero Advisors

Signature of Authorized Representative:



Meghan J. Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

**ATTACHMENT VIII:
CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION**

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

 X

The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation): ☐ Sole Proprietor
 ☐ Partnership
 ☐ Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

Megan Seaton Vice President of Strategic Growth

(Printed/Typed Name and Title of Authorized Representative)



Signature Seaton (Feb 25, 2025 13:21 EST)

Date: 02/25/2025

**ATTACHMENT IX:
HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR
DISADVANTAGED BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB companies should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

Submitter must include a copy of its minority certification documentation as part of this solicitation.
If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

☒ Minority-Owned Business Enterprise
☐ Women-Owned Business Enterprise
☐ Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

Authorized Signature

Megan Seaton
Typed Name

02/25/2025
Date

Subscribed and sworn to before me this 25th day of February (month), 2025 in

Marquise (city), Brow (county), Tennessee (state).

SEAL

Notary Public in and for Blair (County),
State of Tennessee Commission expires: 05/24/2027





Certificate Number: 103118-04
Industry: Information Technology Consulting

The Governor's Office of Diversity Business Enterprise



for the State of Tennessee, having determined that

Avero, LLC DBA Avero Advisors

has successfully met the certification requirements as outlined in Tennessee Code Annotated Title 12, Chapter 3, Part 8, and the policies adopted thereunder hereby grants the designation of

Minority Owned Business

And is recognized as such until the expiration of registration and certification on

October 31, 2027

In Witness Whereof, the Governor of the State of Tennessee and the Commissioner of General Services hereto affix our hand and the Great Seal of the State.

A handwritten signature in cursive script that reads "Kim Henry".

Kim Henry
Director, Governor's Office of Diversity Business Enterprise

ATTACHMENT X

NCTCOG FEDERAL AND STATE OF TEXAS REQUIRED PROCUREMENT PROVISIONS

The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

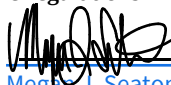
PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT CERTIFICATION

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
 - B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
 - C) Telecommunications or video surveillance services used by such entities or using such equipment.
 - D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.
- The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:



Megan J. Seaton (Feb 25, 2025 13:21 EST)

NAME OF AUTHORIZED PERSON:

Megan Seaton

NAME OF COMPANY:

Avero Advisors

DATE:

02/25/2025

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that “discrimination against a firearm entity or firearm trade association” includes the following:

A) means, with respect to the entity or association, to:

- I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
- II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
- III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.

B) An exception to this provision excludes the following:

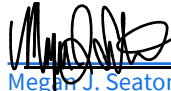
I. contracts with a sole-source provider; or

II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☒ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

**SIGNATURE OF AUTHORIZED
PERSON:**



Megan J. Seaton (Feb 25, 2025 13:21 EST)

NAME OF AUTHORIZED PERSON:

Megan Seaton

NAME OF COMPANY:

Avero Advisors

DATE:

02/25/2025

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

**SIGNATURE OF AUTHORIZED
PERSON:**

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

BOYCOTTING OF CERTAIN ENERGY COMPANIES

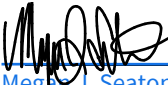
This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

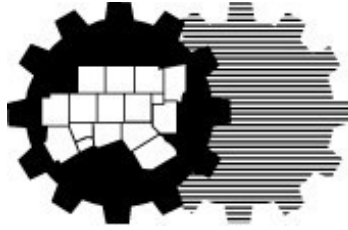
☒ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.**

SIGNATURE OF AUTHORIZED PERSON:	 Megan J. Seaton (Feb 25, 2025 13:21 EST)
NAME OF AUTHORIZED PERSON:	<u>Megan Seaton</u>
NAME OF COMPANY:	<u>Avero Advisors</u>
DATE:	<u>02/25/2025</u>

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.**

SIGNATURE OF AUTHORIZED PERSON:	_____
NAME OF AUTHORIZED PERSON:	_____
NAME OF COMPANY:	_____
DATE:	_____



**ADDENDUM TO THE
REQUEST FOR PROPOSALS
Enterprise Resource Planning (ERP) Consultancy Services**

ADDENDUM NO. 1

DATE ISSUED: January 24, 2025

**REQUEST FOR PROPOSALS NUMBER: NCT-2025-017
ORIGINAL RFP SUBMISSION DATE: February 5, 2025
REVISED RFP SUBMISSION DATE: February 26, 2025**

RFP NCT-2025-017, dated January 6, 2025, is hereby amended to incorporate in full text the following provisions:

Cover Page

Proposal Submittal Deadline

The solicitation response deadline is now Wednesday, February 26, 2025.

Section 3.3 Typographical Error

The deadline for questions for this project is Friday, January 24, 2025.

Section 3.4 Solicitation Schedule

SOLICITATION SCHEDULE

The anticipated schedule for the RFP process is given below. All times indicated are Central Standard Time (CST). NCTCOG may change this schedule at any time through the addenda process.

The anticipated schedule is as follows:

RFP Issued	January 6, 2025	
Pre-Proposal Conference	None	
Inquiry Period Ends	January 24, 2025	5:00 PM CT
Proposal Due Date	February 26, 2025	2:00 PM CT
Executive Board Meeting	April, 2025	
Anticipated Start Date	April, 2025	

Section 3.5

Proposal Submission

Date of proposal updated to reflect February 26, 2025. All other information remains the same.

Section 3.6 Public Opening

3.6 PUBLIC OPENING

The public opening for this RFP will be conducted at approximately 2:05 PM CT on Wednesday, February 26, 2025. The meeting will be held digitally via Microsoft Teams, and will be recorded for the RFP file. Please be advised that a large volume of proposals will result in delays in the decryption process. Access information and the meeting invite will be posted to Public Purchase prior to the date of the public opening.

Section 5.0

Page 12

Product Category information is hereby modified and replaced with:

Product Category #1: Provide *ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #2: Provide *ERP Consultancy Services to assist NCTCOG or TXShare Entity's research and preparation for ERP implementation* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #3: Provide *ERP Consultancy Services to implement or replace an ERP system for NCTCOG or TXShare Entities* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #4: Provide *Standalone Review and Documentation Services for NCTCOG or TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #5: Provide *ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa* for the NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.

Product Category #6: Provide *ERP Consultancy Services otherwise not anticipated in this RFP.*

Exhibit A
Page 34

Exhibit A is replaced in its entirety with the following page:

EXHIBIT A

Description of Desired Product Categories for Proposed Pricing

Respondents should furnish a proposal that specifies pricing for the products and services they propose.

Responses are encouraged from vendors who can only provide a handful of products and services.
Respondents are not expected to be able to provide the entirety of the desired services, though are welcome to if they are able!

Product Category #1: Provide *ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #2: Provide *ERP Consultancy Services to assist NCTCOG or TXShare Entity's research and preparation for ERP implementation* through a contract on the TXShare Cooperative Purchasing Program.

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Product Category #4: Provide *Standalone Review and Documentation Services for NCTCOG or TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation* through a contract on the TXShare Cooperative Purchasing Program.

Product Category #5: Provide *ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa* for the NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.

Product Category #6: Provide *ERP Consultancy Services otherwise not anticipated in this RFP.*

Challenge Objectives

The following list of project deliverables are anticipated by TXShare Entities leveraging a contract resultant of this RFP.

In addition to the narratives desired regarding your firm's capability to provide Product Categories 1-6, and the Primary Components/Other Features of an ERP, Respondents are invited to propose solutions that address the following operational challenges, including but not limited to:

- How can your firm assist in the maintenance and efficiency improvements of or the total replacement of a public-sector entity's legacy Budget, Financial Management, Financial Reporting, Procurement, and other logistical systems?
- How can your firm reduce the sizable technology risk exposure resulting from software obsolescence, hardware/technical infrastructure obsolescence, and the increasing scarcity of technical resources?

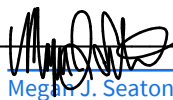
- How can your firm resolve much of the fragmentation of existing administrative systems environment, which hinders process efficiency due to dual data entry, system reconciliations, data-synchronization adjustments, reporting from fragmented data sources, etc.?
- How would your firm incorporate functionality that meets or exceeds Federal security standards (e.g., NIST, FedRAMP Moderate), and provide security functions such as role-based segregation of duties and configurable approval rules that significantly strengthen financial controls?
- What recommend improvements for a system that would be fully integrated with the financial management, asset management, and inventory functions, thereby improving process efficiency and control would your firm suggest?
- What services can your firm provide for better tracking and management of the projects and assets?
- How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?
- What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;
- What methods could your firm provide for the capturing and production of consistent, expandable set of data;
- How can your firm enable a more flexible solution to meet evolving business requirements (e.g., compliance with Governmental Accounting Standards Board [GASB] guidance) that is configurable by business users and does not require software developers to adjust/maintain system rules; and
- How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.
- How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?
- How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?
- How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?

Craig Johnson
Chief Procurement Officer

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Avero, LLC, DBA Avero Advisors

SIGNATURE: _____



Megan J. Seaton (Feb 25, 2025 13:21 EST)

NOTE: Company name and signature must be the same as on the RFP documents.

Exhibit B
Page 36

Exhibit B is replaced in its entirety with the following page. No change to Exhibit B Cont'd.

EXHIBIT B
Service Questionnaire

Indicate the services you are able to provide:

SERVICE	YES	NO
Product Category #1		X
Product Category #2	X	
Product Category #3	X	
Product Category #4	X	
Product Category #5		X
Product Category #6		X

Respondents should address the following items in Tab D: Technical Proposal if they are applicable for the service(s) being proposed.

- Respondents are asked to identify services that they are able to provide.
- Respondents are not required to be able to respond to all services in order to provide a proposal to this RFP.
- Those Respondents that are capable of providing more than a single service, indicate which in the table above, and provide an individual narrative relating to the needs of each Bid Item as described in Exhibit A.
- Responses should consist of detailed descriptions of what a Respondent's firm is capable of providing to the TXSHARE Public Purchasing Cooperative. The narrative for each Product Category must be addressed, but Respondents are encouraged to provide additional detail about their operation and capabilities.

Craig Johnson
Chief Procurement Officer

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Avero Advisors

SIGNATURE: 
Megan J. Seaton (Feb 25, 2025 13:21 EST)

NOTE: Company name and signature must be the same as on the RFP documents.

Exhibit B Cont'd
Pricing Proposal (Firm/Organization)

Respondents are to provide a rate chart for the labor categories/ skill sets outlined below. All rates should be presented as fully loaded hourly rates. Include any other cost categories that should be considered within the “other” category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation.

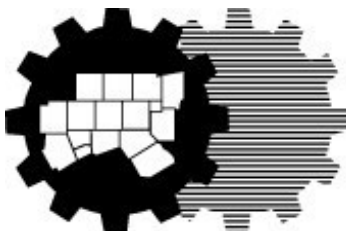
Pricing Format Request Example		Procurement No.:	NCT 2025-017
Respondent Name:			
Notes:	1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2025-017 2. Please provide hourly rates for all staff that would be involved in ERP Consultancy related projects. 3. Use as many lines as needed. 4. Detail any additional information necessary. 5. Proposers are encouraged to offer additional ERP Consulting functions or services to be offered as a catalog option. Please provide any additional options with 'list less' or 'cost plus percentages for pricing. A copy of any catalog services your firm can provide should be included with this response. If no such catalog exists, state “rates as submitted.”		
Enterprise Resource Planning Consultancy - SHARE Cooperative Purchasing Program			
Item	Description	Offered Price	
1	Position Title Project Executive	Specify Rate (Hourly) \$300	
2	Position Title VP of Client Success	Specify Rate (Hourly) \$250	
3	Position Title Director of Client Success	Specify Rate (Hourly) \$225	
4	Position Title Project Manager	Specify Rate (Hourly) \$200	
5	Position Title Associate / Senior Consultant	Specify Rate (Hourly) \$175	
6	Position Title	Specify Rate (Hourly)	
7	Other, Miscellaneous, Etc. We estimate an additional 10% of the total project cost for travel	Specify Rate (Hourly, Daily, Weekly)	
8	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)	
Contractor shall provide additional Enterprise Resource Planning goods or services at cost plus:		%	

EXHIBIT C

RFP 2025-017	Texas Service Area Designation or Identification		
Proposer Name:	Avero Advisors		
Notes:	Indicate in the appropriate box whether you are proposing to service the entire State of Texas		
	Will service the entire State of Texas	Will not service the entire State of Texas	
	X		
	If you are not proposing to service the entire State of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands-Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

RFP 2025-017	Nationwide Service Area Designation or Identification Form		
Proposer Name:	Avero Advisors		
Notes:	Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.		
	Will service all Fifty (50) States	Will not service Fifty (50) States	
	X		
	If you are not proposing to service to all Fifty (50) States, then designate on the form below the States that you will provide service to. By designating a State or States, you are certifying that you are willing and able to provide the proposed goods and services in those States. If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.		
Item	State	Region/MSA/City	Designated as a Service Area
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		
20.	Maryland		
21.	Massachusetts		

22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		



**ADDENDUM TO THE
REQUEST FOR PROPOSALS
Enterprise Resource Planning (ERP) Consultancy Services**

ADDENDUM NO. 2

DATE ISSUED: February 7, 2025

REQUEST FOR PROPOSALS NUMBER: NCT-2025-017
ORIGINAL RFP SUBMISSION DATE: February 5, 2025 REVISED
RFP SUBMISSION DATE: February 26, 2025

RFP NCT-2025-017, dated January 6, 2025, is hereby amended to incorporate in full text the following provisions:

Questions and Answers

Question #1

What ERP applications or products are potentially in scope for this contract? Specifically:

- Which on-premises applications are potentially in scope?
- Which Software-as-a-Service (SaaS) applications are potentially in scope?

Answers

Theoretically, the answer is "all of them."

Unlike traditional procurements, the intent of this contract is retain qualified vendors for ERP Consultancy Services that can then be used as-needed by *any* public sector entity that needs such services without their having to perform a subsequent RFP of their own.

While the NCTCOG will consume from this contract as well, the idea of using rate card pricing is to allow Contractors to curate proposals leveraging the Master Agreement that will result from this RFP for any public sector customer they desire to engage with during the life of the Master Agreement.

The hourly rate card allows a Contractor to scale services to any project, regardless of where in the United States they are providing them.

As a result, each subsequent engagement that Contractors will perform with TxShare Participating Entities will itself be unique.

Question #2

Do services have to be performed using only onshore resources or can offshore resources be utilized to deliver services?

Answers

Respondents should identify all services that are provided by offshore resources in their responses.

Question #3

Good morning. Would it be possible to extend the submission date. As an Oracle sales and implementation partner, we are also responding to your RFPs 2025-018 and 2025-023, thus we need additional time. Kind thanks, Kerry.

Answers

Project has been extended for 3 weeks.

Question #4

Does a Vendor/Respondent need to submit at least four (4) references for each of the product categories it chooses to respond to in the proposal? Or a vendor can submit at least four (4) references overall irrespective of product categories?

Answers

The intent is for four references overall.

Question #5

If a Vendor/Respondent chooses to include subcontractors in the response, can it include the subcontractor's project/client references as part of the overall response? Can subcontractor's project references be counted as part of the required number of references?

Answers

References should be for the Responding firm.

Question #6

Is the rate card for the pricing proposal applicable for the entire contract duration i.e, initial period of 2 years followed by optional annual renewals (up to three years)? Can the rates be modified during annual renewals and/or on case-on-case basis?

Answers

TxShare contracts utilizing rate-cards for services anticipate that the fees are static during the initial term.

Recognizing inflationary impacts and market overhead, awarded contractors may propose fee modifications (either increase or decreases) at each of the renewal option years following the initial term.

Such forecasting information should not be included in the original RFP response.

Question #7

Can the Cost proposal be included in the main Proposal or we need to submit it as a separate attachment?

Answers

Respondents may submit a single document or may submit multiple documents (individual Tabs, cost proposal, etc.)

The cost proposal is extracted by the NCTCOG procurement group regardless before being passed to the Evaluation Committee.

Question #8

Is the Vendor Response to this RFP required to be uploaded as a single PDF file or multiple files can be uploaded?

Answers

Please see answer to question number 7.

Question #9

Do we need to complete Exhibit A and upload it as an attachment to the proposal or we can include our response to Exhibit A as part of the "Technical Proposal" section?

Answers

Exhibit A is simply the comprehensive collection of the desired product categories (deliverables) as well as the solicitation challenge questions.

Respondents may elect to provide responses to this section by either addressing it directly as an individual document, or within their technical proposal response.

If they elect the latter, Respondents should include reference to the challenge question they're addressing in their proposals.

Question #10

In Section 5.0 Scope of Work, the list of "Other Features" includes "Sales", "Order" and "Management" as three separate bullets. We understand that this is a single feature "Sales Order Management". Please confirm.

Similarly, for "E-commerce Market Management". Currently "E-Commerce" and "Market Management" are two separate bullets. Please confirm.

Answers

The product categories and desired features are presented in such a way to organize them into desired services, while potentially using redundant language to ensure no loss of capability in regards to the final product's capability.

Should your firm bundle features such as these under a singular module, please denote in your response what each module does and how it addresses the desired need.

Question #11

As there are multiple categories for a vendor to respond, can we request a 2-week extension to the proposal submission deadline?

Answers

Project has been extended for 3 weeks.

Question #12

Do we need to include the completed "Attachment Checklist" as part of the attachments while uploading our proposal?

Answers

The attachment checklist (page 18 of the solicitation) is for your own reference to ensure you've provided a signed copy of each attachment. The checklist itself is not a required item of your RFP response, but please be sure to include signed copies of the attestations themselves.

Question #13

Can we submit an RFP response as a prime as well as be a subcontractor to another firm who submits an RFP response as the prime?

Answers

Yes

Question #14

Will NCTCoG provide more details on expectations under Product Category #3, for example, is the intention for the vendors to propose ERP system solutions or to provide consulting support to a NCTCoG member agency who is implementing/replacing a system with a third-party software provider?

Answers

It is for consultancy services relating to an Entity that is looking to implement their very first ERP system, or to transition to another ERP system.

There will be a forthcoming RFP for ERP solutions themselves. This project is geared for consultancy services used in conjunction with existing ERPs to increase their efficiencies, planning for the initial adoption of ERP, or for any other consultancy related need.

For clarification - another RFP soon to be published by NCTCOG will be for ERP Systems/solutions themselves. That is not the intended purpose of this project (2025-025).

Question #15

Please confirm if the Product Category #1 Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure through a contract on the TXShare Cooperative Purchasing Program - means providing maintenance / managed services for the deployed ERP application or the IT infrastructure that hosts the ERP application.

Answers

This could be either/or.

The language is intentionally open to allow for the greatest amount of services to fall within each Product Category. The intent is to ensure that Contractors are able to provide services for any potential need that may arise from a TxShare Entity that fall within the parameters of each Product Category.

As multiple entities will consume services off of this contract, we do not desire to artificially limit the services that can be available to them.

This is an enormous value to both the Contractor and their potential clientele.

Question #16

Reference: Attachment IX (HUB, Minority or Women-Owned or Disadvantaged Business Enterprise).

Question: Would NCTCOG recognize MBE certification from either South Central Texas Regional Certification Agency or the National Minority Supplier Development Council?

Answers

Yes, certifications will be accepted as long as they are within valid date periods (if applicable)

Question #17

To provide a comprehensive response across all requested categories, can vendors please have a two-week extension for RFP submittals?

Answers

Project has been extended for 3 weeks.

Question #18

Could NCTCOG provide a copy of CG 20 10-additional insured? Or otherwise provide its additional insured requirements?

Answers

NCTCOG will not be the only consumer off of this contract, and is not considered to be the primary customer.

Any TxShare Participating Entity that has a desire to utilize this cooperative contract will have access to it, therefore it is not prudent to provide only the NCTCOG's insurance requirements.

Contractors will enter into subsequent contracts with each client leveraging the Master Agreement that will be awarded from this RFP. Specific insurance needs will be addressed with each client.

Question #19

Does NCTCOG anticipate the selected firm will hold the fully loaded hourly rates for the 24- month term of the contract?

Answers

Please refer to the answer of Question #6.

Question #20

Is NCTCOG open to negotiating the fully loaded hourly rates per year?

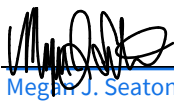
Answers

Please refer to the answer of Question #6.

Craig Johnson
Chief Procurement Officer

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Avero Advisors

SIGNATURE: 
Meghan J. Seaton (Feb 25, 2025 13:21 EST)

NOTE: Company name and signature must be the same as on the RFP documents.