

PROPOSAL

PROPOSAL FOR:

**North Central Texas Council
of Governments**

**ENTERPRISE RESOURCE PLANNING
CONSULTANCY SERVICES RFP NO. 2025-017**

SUBMITTED BY:

BERRY, DUNN, MCNEIL & PARKER, LLC
2211 Congress Street, Portland, ME 04102

Jonathan Grace

Principal | Berry, Dunn, McNeil & Parker, LLC

Proposal Submitted On:

February 26, 2025 before 2:00 p.m. CST



Cover Letter

February 26, 2025

North Central Texas Council of Governments
Attn: Craigan Johnson
616 Six Flags Drive
Arlington, TX 76011

Dear Craigan Johnson:

Thank you for the opportunity to submit this proposal in response to North Central Texas Council of Governments' (NCTCOG's) request for proposals (RFP) 2025-017 for Enterprise Resource Planning (ERP) Consultancy Services. We have read the NCTCOG's request and reviewed its terms, conditions, and the contents presented therein, and are proposing on Product Categories 2, 3, 4, 5, and 6. Our proposal is a firm and irrevocable offer valid for 90 days from the submission deadline of February 26, 2025 before 2:00 p.m. CST.

BerryDunn is a nationally recognized independent management and IT consulting firm, headquartered in Portland, Maine, with 10 office locations. We are focused on **inspiring organizations to transform and innovate** and have preserved our reputation for excellence throughout our 51-year history. Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. We proudly tailor each of our projects to recognize the work our clients do every day. **We care about what we do, and we care about the people impacted by our work—including NCTCOG staff and constituents.**

Meet BerryDunn

BerryDunn is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide services. Since 1974, BerryDunn has helped businesses, nonprofits, and government agencies throughout the U.S., its territories, and Canada solve their greatest challenges. The firm's tax, advisory, and consulting services are provided by Berry, Dunn, McNeil & Parker, LLC, and its attest services are provided by BDMP Assurance, LLP, a licensed CPA firm.

BerryDunn is a client-centered, people-first professional services firm with a mission to empower the meaningful growth of our people, clients, and communities. With 73 principals and 37 owners, BerryDunn employs more than 935 staff across 10 offices nationally. Our Consulting Services Team employs more than 335 staff and has been serving state, local, and quasi-governmental agencies for over 30 years. From extensive project experience for more than 900 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Our firm provides a full range of professional services that supports our ability to complete tasks outlined by NCTCOG on this initiative. These include:

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

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and planning for success. Our consultants have experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents NCTCOG serves.

Figure 1: Local Government Practice Group Specialization



Our Highly Specialized Enterprise Digital Transformation Practice

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

BerryDunn Bridge and Our Independence



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

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

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

Why Choose the BerryDunn Team?

As it relates to the requested ERP Consulting Services, we would like to highlight the following unique attributes offered by our firm:

Full system life cycle experience from assessment through implementation

Integrated change management methodologies through each product category

Independence from the vendor marketplace and broad experience with most ERP vendors and system integrators

Extensive experience in the State, with multiple team members residing in Texas and with State public-sector experience

We appreciate the opportunity to propose, and the time and consideration taken by NCTCOG to review our submission. As a principal in BerryDunn's Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. **If you have any questions regarding our proposal or updates on the evaluation process, please consider me your primary point of contact and feel free to contact me directly.**

Sincerely,



Jonathan Grace, PMP®, Prosci® CCP, Principal

Berry, Dunn, McNeil & Parker, LLC

BerryDunn, 2211 Congress Street, Portland, ME 04102

Tel: 207.541.2260 | Email: JGrace@berrydunn.com

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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.

Legal Name of Proposing Firm

Contact Person Title

Telephone Number E-Mail Address

Street Address of Principal Place of Business City/State Zip

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

Statement of Understanding

The right ERP system can help increase efficiencies, improve financial oversight, reduce risk, and promote data-driven decisions. Implementing a new system is a critical decision with significant business and cost impacts. Recognizing the growing complexity and demands of ERP systems and the challenges associated with maintaining outdated infrastructure, preparing for system implementation, and managing ERP deployments, NCTCOG seeks qualified vendors to assist NCTCOG or TXShare Cooperative Purchasing Program (TXShare) entities to deliver ERP solutions that:

- Maintain, repair, or modify existing ERP infrastructure
- Provide strategic guidance and resources to assist in the preparation for ERP system implementation or replacement
- Execute full-scale ERP implementation projects, helping ensure seamless integration, user training, and post-launch support
- Identify and address emerging challenges leveraging industry expertise and best practices to deliver forward-thinking solutions

These services will reduce risks associated with software obsolescence and fragmented administrative environments; enhance operational efficiency through standardization of processes and integration of core ERP components; and foster long-term value for participating entities.

As a nationally recognized firm with a dedicated Local Government Practice Group, we have more than 30 years of relevant experience and have conducted more than 200 comparable projects for local government organizations across the country. We have a proven background leading public-sector agencies through the ERP needs assessments, preparation of an RFP, evaluation and identification of a solution, and implementation support. As a result of this experience, and our independent and objective advisory services, we are familiar with all major software vendors in the marketplace, including those systems NCTCOG and TXShare entities may have or consider.

Key Personnel

Forming a Team to Satisfy Your Needs

At BerryDunn, we believe in the synergy that accompanies a team approach. We assemble project teams to accommodate our client's specific needs, rather than rely on the same team for each project.

We provide executive-level leadership to help ensure commitment of our firm, appropriate resource allocation, approval of deliverables, and leadership to support our project lead and team as needed. Our subject matter experts (SMEs) are well-versed in local government operations and the functional and technical areas that support service delivery to internal and external stakeholders alike. Notably, 75% of our Local Government Practice Group team members are former public-sector employees. Our experts leverage their backgrounds, project experience, and knowledge of local government best practices to best identify ways in which to improve their clients' current environments. We provide a procurement SME to align efforts to the entity's procurement rules and develop RFPs that result in easily compared vendor responses and entity-specific requirements. In combination, we put our best foot forward with the best team possible to satisfy overall project goals and objectives.

We value building long-lasting relationships with our clients. While we have a deep pool of resources available to support NCTCOG and TXShare entities—including more than 335 in our Consulting Services Team—the teams we propose on projects are the people entities will work with day-to-day in project activities. We understand that organizations as innovative, progressive, and complex as NCTCOG and TXShare entities require a certain level of care and attention to detail to help ensure project success, and we will align our approach to meet client staff where they are and deliver exceptional services to match their caliber.

Did you know?

Our nationwide experience includes more than 50 consulting engagements with cities, counties, and quasi-governmental agencies in the State. We have more than 30 employees who call the State home and team members with prior public-sector experience in Texas.

Typical Roles and Responsibilities

Product Categories 2-6

In the pages below, NCTCOG will find typical roles we consider when composing a team to satisfy client needs. We assign qualified resources to fill the roles identified and customize the teams we propose to reflect the level of support needed in future task orders.

Our **project principal** will have overall responsibility for the services we propose to clients. They will help ensure commitment of our firm and appropriate resource allocation and will review and approve all deliverables in accordance with BerryDunn's quality assurance processes. They will also provide leadership support to our project lead and project team, as needed.

Our **engagement manager** will work with the project manager to monitor the project's progress, track the initiation and completion of tasks and milestones, and oversee the work of our project team.

Our **project manager** will act as primary liaison with a client and will be responsible for maintaining a constructive and clear line of communication between agency staff and BerryDunn. They will monitor project progress, track the initiation and completion of tasks and milestones, and facilitate our meetings and project activities.

Our **business analysts** will provide business analysis support to the project team as it relates to facilitating meetings, preparing status reports, business process mapping, and developing project deliverables in a timely manner. They will also help assess a client's current environment, develop requirements, form recommendations across functional areas, facilitate meetings, and prepare status reports.

Our **project coordinator** will assist with communications between client staff and BerryDunn, monitor progress of the project, track the initiation and completion of tasks and milestones, assist in facilitating meetings and preparing status reports, and assist in the development of project deliverables.

Our **support analyst** will assist certain project management efforts, contribute to reports, and identify and track risks, issues, and action items. They will also propose recommended mitigation and remediation strategies and provide lessons learned from similar engagements.

Did you know?

At BerryDunn, we believe in the synergy that accompanies a team approach. We assemble project teams to accommodate our client's needs, rather than rely on the same team for each project. We carefully assemble dynamic, experienced project teams to lead our work efforts.

Our **financial SME** will assist in the examination of a client's financial functions and provide expertise as it relates to developing sound business requirements and procuring for a supportive solution. They will also assist the business analysts in assessing a client's current environment, business process mapping, developing recommendations, and providing expertise as it relates to finance processes for a future state.

Our **IT specialist/technology analyst** will take part in assessing a client's current environment and developing recommendations for its future state as it relates to any technical considerations a client might encounter, including potential integrations, data requirements, interfaces, and security. They will also assist with facilitating meetings, preparing status reports, and developing project deliverables in a timely manner.

Our **human resources (HR)/payroll specialist** will support the project team by assessing a client's current HR and payroll functions and provide expertise as it relates to developing sound business processes and procuring for a supportive HR and payroll future state.

Our **procurement SME** will oversee the request for information (RFI) and RFP processes with clients as well as provide perspective on procurement processes and best practices.

Our **quality assurance analyst** will assist certain quality assurance efforts, contribute to reports, and identify and track risks, issues, and action items. They will also propose recommended mitigation and remediation strategies and provide lessons learned perspectives from similar engagements as needed.

Our **organizational change management (OCM) lead** will be responsible for providing ongoing stakeholder engagement and support with a client's team to help ensure effective OCM and progress is made with minimal resistance. They will also assist the project team with project deliverables.

Our **training manager** will be responsible for reviewing the training strategy and plan created by the vendor implementation firm, reviewing training materials, helping design a training approach for end users, and helping evaluate if learning objectives have been met.

Our **trainer** will help review and develop training materials, provide training support for end users, and help determine if learning objectives have been met.

Our **strategy lead** will work with client leadership, primarily during early visioning sessions, to craft goals and a vision that will be used throughout the project.

Our **utility management and customer information system (CIS) specialist** will leverage lessons learned and knowledge of best practices gained through extensive experience leveraging technology within local

government utilities and public works departments, assist with fact-finding and assessment activities, and assist with deliverable development.

Our **customer relationship management (CRM)/311 specialist** will help assess a client's current CRM/311 processes and functions and contribute their expertise in developing sound business processes and procuring for supportive future solutions.

Our **asset/inventory management specialist** will help assess a client's current work order and asset management processes and functions and contribute to the work effort where and when it will benefit the client most.

Our **planning specialist** will leverage their experience and knowledge of planning and permitting best practices to provide expertise on in-scope services, assist with documentation reviews, process diagramming, and help facilitate meetings.

Key Personnel

Below and on the following pages, we include brief biographies for representative team members for further review and consideration and the Product Categories we would propose them in. The qualifications and experience exhibited by these team members reflect what NCTCOG can expect of project team members assigned to client engagements.



Seth Hedstrom, PMP®, LSSGB | Categories 2, 3, 4, 5, 6

Berry, Dunn, McNeil, & Parker LLC

Seth is a principal and leads BerryDunn's Local Government Practice Group. Seth has more than 15 years of experience assisting public-sector clients, leading them through many of the complex decision points and issue-resolution processes typical of business process analysis and focused reviews of business processes needing change. He has also managed over 75 enterprise process and technology planning projects. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.



Jonathan Grace, PMP®, Prosci® CCP | Categories 2, 3, 4, 5, 6

Berry, Dunn, McNeil, & Parker LLC

Jon is a principal in our Local Government Practice Group and leader of our EDT practice with over 24 years of experience assisting public-sector agencies with project management, technology planning, business process improvement, software system selection, implementation and design, and ERP systems. He has managed every step of the systems planning process and leverages his extensive knowledge of systems functionality and business process best practices to help ensure his clients experience successful selection and implementation outcomes. He also has experience serving BerryDunn's K-12 public education clients. Prior to joining BerryDunn, he provided user support and assisted in system implementation of ERP products. Jon serves as project principal for projects across the country, and he has managed every step of the procurement process—from assessing the current environment to leading contract negotiations and large-scale system implementations.



Ryan Doil, MBA, Prosci® CCP, CPPB, NIGP-CPP | Categories 2, 3, 4, 5, 6

Berry, Dunn, McNeil, & Parker LLC

Ryan is a principal in our Local Government Practice Group with over 15 years' experience who focuses on ERP system selection and implementation activities – having been involved in over 130 municipal software system planning and implementation projects. He is a Certified Professional Public

Buyer (CPPB), Certified Procurement Professional (NIGP-CPP), and member of the National Institute of Government Procurement (NIGP). Ryan brings more than five years of experience in a federal procurement role and has managed projects similar in scope and size to the services requested by NCTCOG for a number of BerryDunn clients. Ryan is skilled in managing the challenges and constraints for complex, enterprise-wide projects. He has led and assisted in the assessment of current environments, helped define future system requirements through a collaborative and structured system evaluation process, and been involved in overseeing the implementation of a variety of software systems.



David Ledbetter, Prosci® CCP | Categories 2, 3, 4, 5, 6

Berry, Dunn, McNeil, & Parker LLC

David is a senior manager in our Local Government Practice Group with over 10 years' experience in systems planning, selection, and implementation engagement with local government clients. He focuses on finance and administration-related projects, including business process analysis, system selection and implementation, and OCM activities. He has managed more than 65 implementations and brings a unique set of qualifications to this role, having experience serving as finance administrator for Whitman County, WA. As finance administrator, David served as liaison for the county auditor to implement a new ERP software suite, prepare financial reports, and lead change management initiatives.

Did you know?

Our Local Government Practice Group is dedicated to serving public-sector clients, and 75% of our team members are former public-sector employees. Our team leverages their backgrounds, project experience, and knowledge of local government best practices to best identify ways in which to help clients achieve their desired future state.



Jen Ferguson, MPA | Category 2

Berry, Dunn, McNeil, & Parker LLC

Jen Ferguson is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator and director of finance. She is a member of the Government Finance Officers Association (GFOA) and International City/County Management Association (ICMA). Supplementing her background in public-sector administration, Jen actively led or assisted in implementing new ERP software systems for municipalities, and is well-versed in operations, process improvement, organizational development, and performance management.



Charline Petit Homme, MPA, CAPM®, Prosci® CCP | Categories 2, 4, 6

Berry, Dunn, McNeil, & Parker LLC

Charline is a manager in our Local Government Practice Group with six years of public-sector experience. She is a Certified Associate in Project Management® (CAPM®) and has several years of experience with engagement and project management, business process diagramming, conducting research, data collection, organizational reporting, gap analysis, and recommendations development. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts and promoting buy-in.



Ross DeFalle, MBA | Categories 2, 4

Berry, Dunn, McNeil, & Parker LLC

Ross is a senior consultant in our Local Government Practice Group. He has more than three years of IT project management and systems implementation leadership and over seven years in client relationship building and account management. Ross is an experienced change agent for enterprise systems and leading concurrent projects following best practices, tracking scope, milestones, and deliverables. His experience includes providing strategic leadership for complex IT strategic plans, cultivating client

relationships, and consistently achieving functionality goals. Ross has provided business process improvement services to many BerryDunn clients during enterprise system selection. His experience includes fact-finding, recommendations development, and requirements definition. He draws on experience and industry best practices when assisting clients with business process recommendations.



Michelle Graham, MS, MBTI, CPM | Categories: 2, 3, 5

Berry, Dunn, McNeil, & Parker LLC

Michelle is a senior consultant in our Local Government Practice Group with experience managing and executing various types of projects and initiatives while maintaining a constant focus on organizational development and human capital management (HCM). She has experience managing and executing various types of projects and initiatives while maintaining a constant focus on organizational development and HCM. Prior to joining BerryDunn, Michelle held various leadership roles for the City of Pearland, Texas, for more than 20 years. Her experience includes six years as director of HR and more than 15 years of parks and recreation leadership. She has a proven track record in employee retention and has earned multiple departmental and individual awards for her initiatives. She utilizes her professional skills, abilities, ethics, experience, and education to focus on the clients' needs and provide for meaningful work.



Kate Offerdahl-Joyce, NIGP-CPP | Categories 2, 3, 5

Berry, Dunn, McNeil, & Parker LLC

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



Austin Nichols, MBA | Categories 2, 4, 6

Berry, Dunn, McNeil, & Parker LLC

Austin is a senior consultant in our Local Government Practice Group with more than 14 years of relevant experience. Austin has led multiple software system replacement projects and excels by developing action plans through understanding participant requirements, setting goals with measurable outcomes, managing project risks and issues, and providing transparent communication throughout the life cycle of the endeavor. He has successfully managed the implementation of large-scale projects, including ERP and computer-aided dispatch/records management systems (CAD/RMS). While with the City of Weatherford, Texas, he developed a mobile app to connect citizens to organizational services and led a work smarter initiative to reduce cost and increase the efficiency of utility and public works departments.



Tammie Warren, LSS, PMP®, ITIL®4 | Categories 2, 4

Berry, Dunn, McNeil, & Parker LLC

Tammie Warren is senior consultant in our Local Government Practice Group. She is a results-driven business leader with experience in project management, management of large-scale, multi-state enterprise systems, and she has over 12 years focused on HR- and finance-related business operations. She is highly skilled in interpreting and analyzing business processes, with a passion for problem solving and delivering solutions and experience with working with cross-functional teams and facilitating the successful execution of project objectives and milestones. While working with the IDEA Public Schools in

Weslaco, Texas, she provided ERP project management for highly complex systems and integrations as well as analysis and design for multifaceted business processes.



Emma Brown | Categories 2, 4
Berry, Dunn, McNeil, & Parker LLC

Emma Brown is consultant in our Local Government Practice Group and brings a strong background in client work and cross-team collaboration. Her ability to combine data, processes, and technology highlights her commitment to quality analysis and client satisfaction. Further, Emma's attention to detail and communication skills help enable her to convey complex information effectively.

Did you know?

Our clients like partnering with us and find our people make the difference. We value building long-lasting relationships with our clients. Team members we propose for projects are the people clients will work with day-to-day in project activities, each of whom have *chosen this work as their career.*



Allisha Ouellette, MBA | Categories 2, 4
Berry, Dunn, McNeil, & Parker LLC

Allisha Ouellette is a consultant in our Local Government Practice Group. She leverages her eight years of project management, analysis, and coordination experience to develop high-quality deliverables, monthly aggregate reporting, and project management support for state and local government clients. Allisha understands small, local governments with competing resources, and large, complex organizations including Jefferson County Public School District in Colorado, Denton County Transit Authority in Texas, Madison Metropolitan Sewerage District in Wisconsin, and the Massachusetts Executive Office of Energy and Environmental Affairs.



Shannon Schulman, PMP® MA | Categories 2, 4
Berry, Dunn, McNeil, & Parker LLC

Shannon is a consultant in our Local Government Practice Group and is experienced with stakeholder engagement, project coordination, and project documentation. She is also well-versed in business process improvement activities, including current environment assessments and existing data and documentation analysis. Prior to joining BerryDunn, she worked as an implementation consultant for Tyler Technologies where she served a wide range of clients during her three-year stretch with the firm, including assisting in map building for school districts across the nation and implementing utility billing (UB) software for local governments.



Jonathan Sullivan, MBA, MA, MURP | Categories 2, 4
Berry, Dunn, McNeil, & Parker LLC

Jonathan is a consultant in our Local Government Practice Group with more than three years of relevant experience. He brings a strong background in public service and urban planning, zoning, interested party relations, and digital integration experience. Jonathan is skilled at documenting project outcomes, communicating, and researching to support consulting projects. Further, he has contributed to best practice research, project outcomes documentation, and project meeting logistics coordination.



Erin Provazek, MBA, CGCIO, ITIL®, Prosci® CCP, PMP®, COBIT 2019 | Categories 3, 4, 5
Berry, Dunn, McNeil, & Parker LLC

Erin is a senior manager in our Technology Management Practice within our Local Government Practice Group. She is an experienced information systems (IS) executive with extensive public-sector experience. Most recently, she served as the Assistant IT Director for the City of College Station, Texas. With over 24 years of experience working with local government agencies and extensive experience assisting public-sector entities in implementing technology solutions, planning, problem solving, and service delivery,

Erin has demonstrated skills in enhancing operational efficiency and maximizing use of limited resources. Erin is particularly adept at working with clients through translation of technical aspects of selection and implementation projects, including interfaces, integrations, conversion preparation and execution, structured and sustainable access controls, and identification of opportunities to leverage technical features to enhance business processes.



Ian Biggers, Prosci® CCP, PMP® | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Ian is a manager in our Local Government Practice Group who focuses on finance and administration-related projects, including system assessments, selection, and project management. Through his 13 years of public-sector experience, Ian has gained an in-depth background related to finance, HCM, and system management. He leverages this experience to deliver thoughtful, insightful, and creative solutions that provide value for his clients' participants. Ian is skilled in analyzing existing processes and requirements and recommending change to achieve the ideal outcome. He is one of two project managers who recently led Louisville Jefferson County Metropolitan Government, Kentucky's implementation of Workday and UKG. Ian also led our Wake County, North Carolina, HCM implementation advisory services where Wake County implemented Dayforce. In addition, Ian spent several years working for Tyler Technologies as a senior client experience manager and senior technical support specialist. In this role, he planned and facilitated more than 80 client state user group meetings in 38 states annually, including Texas.



Valerie Goetz, MA, Prosci® CCP | Categories 3, 5, 6

Berry, Dunn, McNeil, & Parker LLC

Valerie is a manager in our Local Government Practice Group who is serving as project manager for the Syracuse City School District, New York, on its Oracle Cloud implementation project. Valerie also provided project management services for Yamhill County, Oregon Oracle Cloud implementation. She is a passionate project manager, product owner, product manager, trainer, and senior implementation consultant who effectively manages projects and consultants from discovery to delivery. This includes training, mentoring, troubleshooting, and product advancement using Agile, Iterative, and Waterfall methodologies. She can identify and investigate pain points for any business and through deep analysis find ways to save time and money. Valerie thrives in a fast-paced environment and manages products across complex projects. She champions the needs of business teams throughout the entire process to obtain project goals and objectives.



Clark Lathrum, PMP®, Prosci® CCP | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Clark is a manager in our Local Government Practice Group and an experienced chief information officer, IT director, and project manager with more than 30 years in the public-sector managing, developing, enhancing, testing, and implementing diverse software applications and complex infrastructure projects. He applies his skills to help government customers capitalize on opportunities through technology and process improvement that align with government objectives and business goals. During his tenure with the Arizona Corporation Commission, Clark developed and implemented technology strategic plans, goals, objectives, and budgets to meet agency objectives. He successfully drove the technology component of process improvement initiatives for the agency and, through ongoing collaboration with agency executives and senior management, identified opportunities for expanded integration of technology into business processes. Clark is the project manager for our ERP needs assessment and system selection work with Amarillo, Texas, and ERP system planning work in Tempe, Arizona.



Ryan Brabo, Prosci® CCP | Categories 3, 4, 5

Berry, Dunn, McNeil, & Parker LLC

Ryan is a senior consultant in our Local Government Practice Group. He has over 14 years of experience assisting public-sector agencies with project management, technology planning, business process improvement, system implementation and design, and software systems. Ryan is skilled in managing all aspects of enterprise-wide system implementation projects and is familiar with meeting facilitation and risk management. Ryan has assisted over 35 local government clients with their business and technical systems projects. Prior to joining BerryDunn, Ryan worked in the New World Systems division of Tyler Technologies. This involved the building, revision, imports, and adjustments of the chart of accounts, version upgrades, patch application, user acceptance testing, and user security management and workflow maintenance.



Amy Clark, MA, CGFO | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Amy is a senior consultant in our Local Government Practice Group with a history as a governmental accountant. She has more than 16 years of experience serving the public-sector, of which 12 years were spent implementing ERP software. Amy is well-versed in maintaining internal controls and improving efficiencies, as well as understanding, translating, and applying the rules promulgated by the Governmental Accounting Standards Board to deliver the highest quality work possible.



Pam Coleman, CPP, Prosci® CCP | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Pam is a senior consultant in our Local Government Practice Group with more than 20 years of experience in the municipal software industry, ranging from customer service and training to project management of implementations. She has a deep understanding of how public-sector clients leverage technology to meet their finance, budget, payroll, and HR needs. During Pam's eight-year tenure with a public-sector software provider, she primarily assisted mid- to large-sized city and school district clients in the implementation of enterprise system products for finance, budget, payroll, and human resources functions. As an implementation consultant, she routinely supervised configuration, testing, training, and go-live activities. Furthermore, Pam is a Certified Payroll Professional (CPP).



Daniel Earnest, PMP®, CSSBB | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Daniel is a senior consultant in our Local Government Practice Group with over 10 years' experience in project management, operations, and supply chain management. During his time with Tyler Technologies, Daniel managed software implementation projects for clients across the United States and Canada. While managing software implementations, Daniel developed a project management system for future project managers, drafted project processes, client-facing training agendas, and support policies. He brings a strong background in process improvement, department growth, and change implementation.



Robert Hatton | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Robert is a senior consultant in our Local Government Practice Group and implementer with a proven track record of successful complex implementations. He has over 30 years of project management experience, leading both internal and external project teams. Robert is skilled in clarifying business requirements, performing gap analysis, including the development of risk analysis tools, and designing processes with system improvements to increase productivity and reduce costs. Robert's original accounting background has extended to extensive experience delivering business and system

solutions for a variety of industries from governmental municipalities to blue chip international corporations. Robert provided project management services for the Hamilton County, Indiana, Workday implementation project and is currently serving as the project manager for the City of Galveston, Texas, Workday implementation project.



Keith Linton, PMP®, ITIL® (F) | Categories 3, 4, 5
Berry, Dunn, McNeil, & Parker LLC

Keith is a senior consultant in our Local Government Practice Group who specializes in addressing complex issues by providing resolutions in a fair, concise, and transparent manner. He focuses on managing stakeholder expectations by developing solid internal and external business relationships, and he excels at maintaining a focus on the big picture vision while managing details to meet organizational goals and objectives.



Abigail Starr, Prosci® CCP | Categories 3, 5
Berry, Dunn, McNeil, & Parker LLC

Abigail is a senior consultant in our Local Government Practice Group. She has over 10 years of experience in project management, OCM, business analysis, and project coordination, including as it relates to software integration, training and development, and strategy and planning for IT projects. She leverages her experience as a Prosci® CCP to help clients manage change and builds OCM tenants and techniques into client work plans, projects, and initiatives, generating participant buy-in to help ensure the success of future states. She specializes in providing agencies with recommendations for creating and implementing technology platforms to improve system processes.



Michele Riazzi, PMP®, MBA | Categories 3, 5
Berry, Dunn, McNeil, & Parker LLC

Michele is a senior consultant in our Local Government Practice Group. Through her combined background of implementation experience in the public sector and as a former implementation project manager, she brings more than 10 years of experience in business process review, current/future state analysis, business process diagramming, and information-gathering from stakeholders. In her work for the City of Long Beach, California, she led the City's HCM system initiative. There, she managed and coordinated a Tyler team of implementation consultants, as well as form design and development personnel, to meet the City's needs to implement a new system. Her work included defining roles and responsibilities, developing and managing the project plan and schedule, and collaborating and managing resources, constraints, scopes and timelines.



Shaunteria Brown, PMP®, CSM®, CSPO® | Categories 3, 5
Berry, Dunn, McNeil, & Parker LLC

Shaunteria Brown is a consultant in our Local Government Practice Group with over five years in project coordination, business analysis, and digital marketing. Shaunteria is skilled in process documentation, requirement management, and risk mitigation. She has delivered quality results under tight deadlines, optimized workflows, and collaborated cross-functionally.

Did you know?

We are proud to offer a pool of over 335 consulting resources. These resources offer experience and expertise among practices such as community development and planning; technology management; justice and public safety; parks, recreation, and libraries; and health and community services, among others. Collectively, we are well-qualified to support clients as they seek to improve, transform, and innovate as well as achieve their desired future state.



Brianna Padron, PMP® | Categories 3, 4, 5

Berry, Dunn, McNeil, & Parker LLC

Brianna is a senior consultant in our Local Government Practice Group. She leverages her expertise in project coordination, project controls, and business analysis to develop high-quality deliverables, work breakdown structures, and project budgets for state and local government clients. Brianna advises project managers as to whether those schedules were logical, complete, and satisfactory of contract requirements. She prepares and disseminates aggregate weekly and monthly reports on cost performance, trends, forecasts, and savings. Brianna also analyzes variances in cost and schedule performance against the plan and communicated reasons for the issuance of variance and proposed mitigation plans.



Melissa Urteaga, MSW | Categories 3, 5

Berry, Dunn, McNeil, & Parker LLC

Melissa Urteaga is a consultant in BerryDunn's Local Government Practice Group with more than 20 years of experience in project management, process improvement and implementation, and data management. Melissa provides her clients with a team-centric approach meant to promote knowledge transfer and a blueprint for success for future teams. As a consultant and administrative expert, Melissa is skilled in deliverable development, review and analysis of vendor documentation, and stakeholder engagement throughout OCM initiatives for her clients.



Kevin Price, MPP, PMP®, Prosci® CCP | Category 6

Berry, Dunn, McNeil, & Parker LLC

Kevin is a principal in our Local Government Practice Group and leader of our Technology Management and Community Development and Utility Operations practice groups. He assists local government clients with business process improvement, technology planning, system selection, and implementation projects. A certified PMP®, Kevin has extensive experience in assessing the business needs and processes of public-sector clients for overall IT environments. Kevin is also a Lean Six Sigma Green Belt, allowing him to continuously define, measure, analyze, improve, and control projects and environments for his clients.



Evan Agnello, MS | Category 6

Berry, Dunn, McNeil, & Parker LLC

Evan is a senior consultant in our Local Government Practice Group. He is an experienced leader with a demonstrated history of working with both internal and external clients. He has extensive experience with enterprise software selection projects, public-facing technologies, and recently served as project manager for the City of Tampa, Florida as it implemented a CRM solution. Prior to joining BerryDunn, Evan served as senior customer success manager for CentralSquare Technologies as well as in multiple leadership roles at Tyler Technologies/New World Systems, including technical services manager. Evan utilizes his extensive experience in system selection and project management to develop a thorough understanding of a client's needs, helping ensure continued success and effective adoption of the right product solutions.



Cheree Ladner, MBA | Category 6

Berry, Dunn, McNeil, & Parker LLC

Cheree is a senior consultant in our Local Government Practice Group with more than 15 years of experience in local government utilities and public works departments. A seasoned project manager for CIS, UB, community development, enterprise asset management, and ERP software, her approach is shaped by her focus on relationship building and business education. She is experienced with implementing enterprise-wide software solutions, including facilitating planning sessions to develop project management

plans, providing ongoing project updates, developing risk management plans, and communicating changes. She will leverage lessons learned and knowledge of best practices gained through her extensive experience with technology within local government utilities and public works departments.



Cary Pankovich | Category 6

Berry, Dunn, McNeil, & Parker LLC

Cary is a senior consultant in our Local Government Practice Group who focuses on customer service and financial systems. With more than 20 years of experience assisting clients, including as a testing governance and development liaison to water and sewer utilities, Cary has facilitated and implemented programs that promote team building, as well as increase the productivity and reliability of systems. He prioritizes client satisfaction by helping ensure projects stay on time and on budget. Further, Cary understands the complexities and nuances of a wide range of systems, thus understanding the most efficient, effective, and user-friendly solutions for his clients. His experience includes program and project leadership, billing operations, and software applications.



Joy Payne | Category 6

Berry, Dunn, McNeil, & Parker LLC

Joy is a senior consultant in our Local Government Practice Group. She is an expert in IT with progressive leadership experience as it relates to assisting clients with large-scale software changes. She often serves as the chief facilitator and central communicator on projects, bridging communication gaps between business area representatives and IT staff.



Andrea Brinkley, MPA, PMP® | Category 6

Berry, Dunn, McNeil & Parker, LLC

Andrea is a senior consultant in BerryDunn's Local Government Practice Group. She has 24 years of municipal government experience with prior public-sector titles ranging from capital improvement program director to assistant director of capital projects and assistant director of public works for the City of Pflugerville, Texas. As such, she has extensive experience in operational and capital improvement budgets, training, project management, analysis of service delivery, operational assessment, and engagement with communities. She has worked with utilities, public works, and finance department teams to formulate project-related costs, conduct forecasting, and assist with programming and planning for debt issuances and new source funding. Andrea has supported BerryDunn's asset-management-related consulting projects for clients such as the cities of Cedar Park and Fort Worth, Texas.



Khara Dodds, MCRP, AICP | Category 6

Khara is a manager in BerryDunn's Local Government Practice Group. She is an AICP-certified planner with over 20 years of planning and community engagement experience, including 13 years of experience in public-sector leadership roles. She has led various departments in planning and land use services, economic development, code compliance, and fire and inspections services. Most recently, she served as the Director of Development Services for the Town of Prosper, Texas, and as Director of Planning and Land Use Services for the Town of Glastonbury, Connecticut. Khara has supported planning and permitting improvement projects for clients such as the City of Miami Beach, Florida; City of Woodinville, Washington; and the Cities of Fort Worth and Leander, Texas.

References

The greatest testament of our high-quality work is the expressed satisfaction shared by our clients. Below, we describe and provide contact information for several recent projects for NCTCOG's consideration. These clients can speak well to the quality and satisfaction we deliver on comparable engagements.

City of Amarillo, Texas

ERP Needs Assessment System Selection

Laura Storrs, City Manager and Chief Financial Officer

806.378.6207 | laura.storrs@amarillo.gov



The City of Amarillo retained BerryDunn to provide consulting services to conduct an evaluation of the various applications currently in use throughout the City against business needs and best practices in municipal agencies. The focus of this project was to identify, define, evaluate, and plan for the replacement of the existing ERP system software (JD Edwards) as well as for applications that support related business processes. Following a successful engagement to select a new ERP system, the City retained BerryDunn to provide project management support for the ERP system implementation and for an additional scope of work to assist with the replacement of its legacy UB system.

08/2021 – present

City of Galveston, Texas

ERP Systems Consulting Services

Hope Dean, Executive Director and CITO

409.797.3578 | hdean@galvestontx.gov



The City of Galveston selected BerryDunn to conduct a needs assessment and provide consulting services to evaluate its former ERP system, Banner. With approximately 850 employees, the City sought to modernize its ERP technology to streamline processes across departments and enhance service delivery. BerryDunn led a multi-phase project that included conducting a comprehensive needs assessment, defining functional and technical requirements, and guiding the City through RFP development and vendor selection. Key activities involved analyzing current business processes, identifying gaps, engaging stakeholders through surveys and workshops, and hosting vendor outreach sessions. The project also incorporated OCM strategies to help ensure alignment with the City's objectives. Following the selection process, BerryDunn supported the City in contract negotiations and implementation planning for the chosen ERP vendor, Workday. BerryDunn is currently providing project management services for the City's Workday implementation.

05/2020 – present

City of Denton, Texas

ERP Replacement Needs Assessment

Leisha Meine, Chief Technology Officer

940.634.9278 | Leisha.meine@cityofdenton.com



BerryDunn was selected by the City of Denton to assess their existing ERP environment. We began by developing and administering a milestone stakeholder readiness assessment web survey. A memo was compiled based on the findings from the survey and sent to the City's project team for feedback. We then held fact-finding meetings to gain insights from City

staff as it related to the current landscape and functionality of the existing ERP system. This led to the development of a needs assessment report outlining key considerations including a high level summary of findings, gaps/deficiencies, best practices, opportunities for improvement, and additional preliminary considerations. Currently, we have completed the needs assessment phase and are preparing for the procurement phase.

03/2023 – present

City of Mansfield, Texas

ERP Needs Assessment and System Selection

Troy Lestina, Chief Financial Officer

817.276.4258 | troy.lestina@mansfieldtexas.gov



BerryDunn was chosen by the City of Mansfield to conduct its ERP system needs assessment and selection process. We worked with the City to develop and issue an end-user web survey and an information request to evaluate opportunities and challenges with its business processes. We also facilitated fact-finding meetings with City staff to evaluate their experiences in daily interactions with legacy systems.

BerryDunn then worked to develop functional and technical requirements, developed an RFP, assisted with system selection activities, and provided contract negotiation and approval assistance.

12/2020 – 02/2022

Project-Related Experience and Qualifications

Our Ability to Meet the Requirements of Product Categories 2-6

As is evident in the key points that follow, we are well-qualified to partner with NCTCOG and TXShare entities on services in Product Categories 2-6. We look forward to leveraging our strengths to support participating clients' related needs both now and in the future.



Our full life cycle experience from system selection to implementation, including contract negotiations. With BerryDunn, the entities will be served by a firm with extensive experience assisting clients in every stage of the enterprise system planning, selection, contract negotiations, and implementation life cycle. In fact, we have conducted more than 200 systems-related engagements. We have provided implementation project management and project oversight, including engagements involving multiple ERP vendors. As a result of this

and our independence from the vendor marketplace, we have become familiar with all major ERP vendors and the functionalities their systems provide.



Our integrated change management and project management methodologies. Our work for the entities will be guided by established project management methodologies and best practices as defined by the Project Management Institute® (PMI®), as well as inputs from Agile and Lean principles. We know the important role OCM plays in business process improvement and system replacement projects; therefore, we integrate a disciplined change management approach to our work, using the Prosci® change management

methodology as a foundation. This integration will help ensure client stakeholders have opportunities to provide input, support, and buy-in for all decisions and are invested in the success of the client's future state.



Our independent and objective advisory services. Central to our identity is the preservation of our independence and objectivity. Our team has many years of large-scale enterprise business process, system advisory, and implementation experience, but our firm does not sell, develop, or provide staff augmentation services for software, hardware, or implementation vendors. We do not have any preferred vendors and clients will not find our name listed as partners, affiliates, or sponsors of any vendor, nor does BerryDunn sell

hardware or software products. This—along with our BerryDunn Bridge program—allows us to provide unbiased system consulting services and only work in the client's best interests at all times. Our ability to objectively advise the client on considerations related to evaluating system functionality, as well as related system integrators, will be critical to the client's initiatives in Product Categories 2-6.



Our proud history serving those in the State's local government landscape. With BerryDunn, NCTCOG and TXShare participating entities will be served by a firm well-versed in local government operations and best practices, both nationally and within the State. Our consulting engagements in the State include work with more than 50 cities, counties, and quasi-governmental agencies, many of which focused on addressing system replacement needs, ERP implementations, business process reviews and documentation, ERP system

upgrades and/or migrations from on-premises solutions to cloud solutions and vice versa, and other ERP consultancy services. We have more than 30 employees who call the State home, and team members with prior public-sector experience in the State. This deep and expansive background will help ensure we bring firsthand insights, as well as industry, regional, and national best practices to clients' projects.

In Table 1 below, we highlight the experience and strengths we bring to Product Categories 2-6. Additional detail can be found in the **Relevant Experience**, **Additional Services**, and **Technical Proposal** sections.

Table 1: Ability to Meet Requirements in Product Categories 2-6

Category 2 Provide ERP Consultancy Services to assist NCTCOG or TXShare's research and preparation for ERP implementation	
• Core BerryDunn service • Collaborative approach with diverse stakeholder participation • RFI and benchmarking analysis	• RFP development and contract negotiation support • Team members with cooperative purchasing background
Category 3 Provide ERP Consultancy Services to implement or replace an ERP system	
• Core BerryDunn service • Team members with prior ERP implementation experience	• Multiple project management offerings • Familiar with ERP vendors implementation approaches
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	
• Core BerryDunn service • Facilitate sessions by functional area to document current business processes	• Document process in narrative and visual formats • Document challenges and areas for improvement
Category 5 Provide ERP system upgrades and/or migrations from on-premises to cloud solutions and vice versa	
• Core BerryDunn service • RFP development and contract negotiation support • Team members with prior ERP implementation experience	• Multiple project management offerings • Familiar with ERP vendors upgrade and/or migration approaches
Category 6 Provide ERP Consultancy Services otherwise not anticipated in the RFP	
• OCM • Strategic vision and sponsor coaching	• Related systems consultancy experience (e.g. HCM, Time & Attendance systems, UB systems, permitting and licensing systems, asset management and work order systems)

Brief BerryDunn Background

BerryDunn is a professional services firm with practices dedicated to serving state, local, and quasi-governmental agencies. We were formed in 1974 and have experienced sustained growth throughout our 51-year history. BerryDunn employs more than 935 staff members (including more than 335 in our Consulting Services Team) and has more than 30 years' experience providing state and local agencies across the country with the services in Product Categories 2-6. Our Consulting Services Team serves more than 900 state, local, and quasi-governmental agencies across all 50 states, as well as in Puerto Rico and Canada, while our Local Government Practice Group alone has served more than 500 clients. BerryDunn is headquartered in Portland, Maine, and serves clients nationally through our 10 office locations and home offices across the nation.

BerryDunn has a demonstrated commitment to serving public-sector clients in the State. We have developed a strong understanding of the public-sector landscape in the State through recent or ongoing consulting engagements with clients in 14 out of the 16 regions of the State as outlined in Exhibit C, as seen below. TXShare participating organizations are in **bold**. We intend to provide services to the entire State, as well as all 50 states.

- 
- ▶ **City of Allen**
 - ▶ City of Amarillo
 - ▶ **City of Arlington**
 - ▶ City of Austin
 - ▶ **City of Benbrook**
 - ▶ **City of Burleson**
 - ▶ City of Carrollton
 - ▶ **City of Cedar Hill**
 - ▶ **City of Cedar Park**
 - ▶ City of College Station
 - ▶ **City of Dallas**
 - ▶ **City of Denton**
 - ▶ **City of DeSoto**
 - ▶ **City of Duncanville**
 - ▶ **City of Ennis**
 - ▶ **City of Farmers Branch**
 - ▶ **City of Fate**
 - ▶ **City of Fort Worth**
 - ▶ **City of Frisco**
 - ▶ **City of Galveston**
 - ▶ **City of Garland**
 - ▶ **City of Georgetown**
 - ▶ **City of Grand Prairie**
 - ▶ **City of Irving**
 - ▶ City of Katy
 - ▶ City of Leander
 - ▶ **City of Mansfield**
 - ▶ **City of Mesquite**
 - ▶ City of Midland
 - ▶ City of New Braunfels
 - ▶ **City of Pasadena**
 - ▶ City of Pearland
 - ▶ **City of Pflugerville**
 - ▶ **City of Plano**
 - ▶ City of Port Arthur
 - ▶ **City of Richardson**
 - ▶ **City of Rowlett**
 - ▶ City of Sugar Land
 - ▶ **City of University Park**
 - ▶ City of Weatherford
 - ▶ City of West University Place
 - ▶ City of Wichita Falls
 - ▶ **Denton County Transit Authority**
 - ▶ **Ellis County**
 - ▶ **Galveston County**
 - ▶ **North Texas Emergency Communications Center**
 - ▶ Round Rock Independent School District
 - ▶ **Tarrant County College District**
 - ▶ Texarkana Water Utilities
 - ▶ Texas A&M University
 - ▶ Travis County
 - ▶ **Williamson County**

We have also had consulting engagements with the following TXShare participating organizations outside of Texas:

- ▶ City of Avondale, Arizona
- ▶ City of Denver, Colorado
- ▶ City of Lawrence, Kansas
- ▶ City of Louisville, Kentucky
- ▶ City of Port Orange, Florida
- ▶ City of Richmond, Virginia
- ▶ City of Scottsdale, Arizona
- ▶ City of Springfield, Oregon
- ▶ El Paso County, Colorado
- ▶ Louisville/Jefferson County Metropolitan Government, Kentucky
- ▶ Loudoun County, Virginia

Relevant Experiences

Full System Replacement Life Cycle (Categories 2, 3, 5, 6)

BerryDunn has extensive experience in providing a variety of system consulting services to clients in Product Categories 2, 3, 5, and 6. In Table 2, we have included a summary of public-sector system consulting projects with which our firm has assisted **in the last five years**. We have also provided population data for additional context.

Table 2: Systems Consulting Experience

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Counties and Regional Governments							
Adams County, Colorado (519,570)	•	•	•	•	•	•	•
Berks County, Pennsylvania (415,000)	•	•	•	•	•	•	
Calumet County, Wisconsin (53,000)	•	•	•				
Carver County, Minnesota (102,100)						•	•
Chesterfield County, Virginia (353,000)	•	•	•	•	•	•	
Clark County, Washington (488,000)	•	•	•	•	•	•	•
Coconino County, Arizona (140,000)						•	•
Doña Ana County, New Mexico (218,000)	•	•	•	•	•	•	
Ellis County, Texas (185,000)	•	•	•	•	•	•	•
Fauquier County, Virginia (75,600)						•	•
Goochland County, Virginia (23,000)	•	•	•	•	•	•	•
Hamilton County, Indiana (338,000)	•	•	•	•	•	•	•
Henrico County, Virginia (325,000)	•	•	•	•	•		
Kaua'i County, Hawai'i (72,000)	•	•	•	•	•		
King George County, Virginia (28,000)	•	•	•	•	•	•	
Maui County, Hawai'i (167,000)	•	•	•	•	•	•	
Middlesex County, Virginia (10,900)	•	•	•	•	•	•	
Minnehaha County, South Dakota (183,000)	•	•	•	•	•	•	•

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Mobile County Health Dept, Alabama (415,000)	•	•	•	•	•	•	•
Monroe County, Florida (74,000)	•	•	•	•	•	•	•
Montgomery County, Pennsylvania (831,000)	•	•	•	•	•	•	•
Outagamie County, Wisconsin (184,000)	•	•	•	•	•	•	•
Peoria County, Illinois (179,000)	•	•	•	•	•	•	•
Person County, North Carolina (39,000)							•
Saginaw County, Michigan (191,000)	•	•	•	•	•	•	•
Scott County, Iowa (166,000)	•	•	•	•	•	•	•
Sussex County, Delaware (200,000)	•	•	•	•	•	•	•
Washington County, Minnesota (252,000)	•	•	•	•	•	•	•
Waukesha County, Wisconsin (407,000)	•	•	•	•	•	•	
Yamhill County, Oregon (107,000)	•	•	•	•	•	•	•
Municipalities							
City of Alameda, California (79,000)							•
City of Amarillo, Texas (199,000)	•	•	•	•	•	•	•
City of Aurora, Colorado (369,000)	•	•	•	•	•	•	•
City of Avondale, Arizona (85,000)	•	•	•	•	•	•	•
City of Beaverton, Oregon (97,000)	•	•	•	•	•	•	•
City of Boca Raton, Florida (91,000)	•	•	•	•	•	•	•
City of Boulder, Colorado (105,000)							•
City of Brighton, Colorado (40,000)	•						
City of Broken Arrow, Oklahoma (112,000)	•	•	•	•	•	•	•
City of Burlington, Vermont (43,000)							•
City of Cedar Falls, Iowa (41,000)	•	•	•	•	•	•	

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
City of Cedar Park, Texas (77,600)	•	•					
City of Coral Springs, Florida (128,000)	•	•	•	•	•	•	•
City of Danville, Virginia (41,000)	•	•	•	•	•	•	
City of DeSoto, Texas (53,000)	•	•	•	•	•	•	
City of Detroit, Michigan (675,000)	•	•	•	•	•	•	•
City of Dover, Delaware (37,453)	•	•	•	•	•	•	•
City of Duncanville, Texas (40,000)							•
City of Edina, Minnesota (52,000)	•	•	•	•	•	•	•
City of Fargo, North Dakota (122,000)	•	•	•	•	•	•	
City of Farmers Branch, Texas (35,000)	•	•	•	•	•	•	•
City of Fort Collins, Colorado (165,000)	•	•					
City of Fountain Valley, California (56,000)	•	•	•	•	•	•	•
City of Frisco, Texas (177,000)	•	•	•	•	•	•	•
City of Gahanna, Ohio (35,000)	•	•	•	•	•	•	•
City of Gaithersburg, Maryland (68,000)	•						
City of Garland, Texas (238,000)	•						
City of Glendale, Arizona (237,000)	•	•	•	•	•	•	•
City of Grand Prairie, Texas (193,837)							•
City of Helena, Montana (32,000)	•	•	•	•	•	•	•
City of Independence, Missouri (117,000)	•	•	•	•	•	•	•
City of Irvine, California (273,000)	•	•	•	•	•	•	•
City of Irving, Texas (230,000)	•	•	•	•	•	•	•
City of La Mesa, California (60,000)	•						
City of Lakeville, Minnesota (64,000)	•	•	•	•	•	•	•
City of Lawrence, Kansas (96,000)	•	•	•	•	•	•	•

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
City of Livermore, California (90,000)	•	•	•	•	•	•	
City of Long Beach, California (470,000)							•
City of Mansfield, Texas (70,000)	•	•	•	•	•	•	
City of Midland, Texas (119,000)	•	•	•	•	•	•	•
City of Minot, North Dakota (48,000)						•	•
City of Ormond Beach, Florida (42,000)							•
City of Philadelphia, Pennsylvania (1,581,000)	•	•					
City of Plano, Texas (287,000)	•	•	•	•	•	•	
City of Puyallup, Washington (41,000)						•	•
City of Redding, California (92,000)	•	•	•	•	•	•	•
City of Richland, Washington (53,000)	•	•	•	•	•	•	•
City of San Leandro, California (90,000)	•	•	•	•	•	•	
City of Santa Fe, New Mexico (70,000)	•	•	•	•	•	•	•
City of Simi Valley, California (126,000)							•
City Spokane Valley, Washington (98,000)	•	•	•	•	•	•	•
City of St. Charles, Missouri (70,000)	•	•	•	•	•	•	
City of Sugar Land, Texas (89,000)			•	•	•	•	•
City of Surprise, Arizona (121,000)	•	•	•	•	•	•	•
City of Tampa, Florida (388,000)	•	•	•	•	•	•	•
City of Tucson, Arizona (525,000)	•	•	•	•	•	•	•
City of Weatherford, Texas (31,000)	•	•	•	•	•	•	•
City of Wheat Ridge, Colorado (31,000)	•	•	•	•	•	•	
City of Wilmington, North Carolina (117,000)	•	•	•	•	•	•	•
Village of Oak Park, Illinois (52,000)	•	•	•	•	•	•	•
Regional and Special Purpose							

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Coachella Valley Association of Governments, California (represents 10 cities, one county, and four Native American tribes)	•	•	•	•	•	•	•
Chicago Metropolitan Agency for Planning, Illinois (CMAP) (2,710,000)	•	•	•	•	•	•	•
City-County Information Technology Commission (CCITC), Wisconsin (serves Marathon County, the City of Wausau, three counties' healthcare, four police departments, and Marathon public library system)	•	•	•	•	•	•	
Lafayette Consolidated Government, Louisiana (242,000)	•	•	•	•	•	•	
Louisville/Jefferson County Metro, Kentucky (740,000)	•	•	•	•	•	•	•
Metropolitan Government of Nashville and Davidson County, Tennessee (684,000)	•	•	•				
Omaha-Council Bluffs Metropolitan Area Planning Agency, Nebraska (968,000)	•	•	•	•	•	•	
Tri-County Health Department, Colorado (1,400,000)	•	•	•	•	•	•	•
Waste Commission of Scott County, Iowa (175,000)	•	•	•	•	•	•	
K-12 Public Education							
Chesterfield County and Public Schools, Virginia (62,000 students)	•	•	•	•	•	•	
City of Worcester and Public School Department, MA (23,000 students)	•	•	•	•	•	•	•
Jefferson County School District, Colorado (69,000 students)	•	•	•	•	•		
Laramie County School District One, Wyoming (14,000 students)	•	•	•	•	•	•	

	BerryDunn's Involvement						
	Needs Assessment	Requirements Definition	RFI/RFP Development	Evaluation Criteria Development	Vendor Selection	Contract Negotiations and Approval	Implementation Assistance
Metro Nashville Davidson County Schools, Tennessee (86,000 students)	•	•	•	•			•
Newport School District, New Hampshire (1,000 students)	•						
Syracuse City School District, New York (20,000 students)				•	•	•	•

Functional Area Familiarity (Categories 2- 6)

BerryDunn has extensive experience assisting clients in every stage of the enterprise system planning, selection, and implementation life cycle; experience and familiarity with all systems and their associated modules in the marketplace; and lack of affiliation with any specific vendor. Our experience assessing a wide variety of vendors means that we understand the capabilities and limitations of today's systems. Enterprise systems that we have reviewed as part of system planning engagements and those that clients have selected for implementation are included in Figure 2 below. While BerryDunn does not recommended particular systems, we provide clients with the information they need to feel confident in the decision they make for moving forward with future solutions. NCTCOG and TXShare entities will be pleased to notice that we have experience with all in-scope modules, also described in Figure 2, thereby helping ensure a thorough and insightful process.

Did you know?

Our services align with all the functional areas outlined in Section 5.0 and more.

Figure 2: Enterprise System Vendors



 Financial Management Accounting, Finance, General Ledger Accounts Payable Accounts Receivable Budgeting Check Reconciliation Grant Management Payroll Procurement, Purchasing Project Accounting Treasury Management	 Human Capital Management Applicant Tracking Benefits Certificates and Training Employee Timecard Human Resources Learning Management Payroll Performance Management Personnel Recruiting Time Entry, Scheduling	 Tax, Billing, Collections Cash Receipts Credit Card Functionality Debt Service Management Miscellaneous Billing Payment Card Processing Point of Sale Revenue Collections Tax Billing and Collections	 Permitting and Land Use Building Permits and Licenses Code Enforcement Computer Assisted Mass Appraisal Electronic Plan Review GIS Inspections Land Management Permitting Planning and Zoning	 Public Safety Computer-Aided Dispatch Fire Records Management Records Management
 Enterprise Asset Management Facilities Management Fixed/Capital Asset Management Fleet Management Inventory Management Work Orders	 Utility Billing Customer Information Management Service Order Management Utility Management and Billing	 Customer Relationship Management Customer-Facing Web Interface Customer Information Management Request for Service	 Justice Municipal Court Jail Management Probation Management Prosecution Management	 Other Business Intelligence Clerk/Recorder's Contract Management Document Management Electronic Health Records Occupational Licensing Special Assessments

Implementation Assistance (Category 3)

BerryDunn has conducted more than 200 systems-related projects, and we have been involved in all stages of the system life cycle. This involvement includes requirements and RFP development, vendor and/or system integrator selection, the contract negotiations and approval process, and implementation support activities. In Table 3, below, we list those systems consulting clients for which we provided comparable implementation services—whether in a project management, oversight, quality assurance, or independent verification and validation (IV&V) capacity. We have served a wide variety of organizations on similar engagements, as seen below.

Table 3: Local Government Implementation Support Experience

Adams County, CO Carver County, MN Chicago Metropolitan Agency for Planning, IL City of Alameda, CA City of Allen, TX City of Amarillo, TX City of Aurora, CO City of Avondale, AZ City of Beaverton, OR City of Bismarck, ND	City of Fargo, ND City of Farmers Branch, TX City of Fountain Valley, CA City of Frisco, TX City of Gahanna, OH City of Glendale, AZ City of Grand Prairie, TX City of Grants Pass, OR City of Helena, MT City of Independence, MO City of Irvine, CA	City of Rapid City, SD City of Redding, CA City of Richland, WA City of San Leonardo, CA City of Santa Fe, NM City of Shoreline, WA City of Simi Valley, CA City of Sioux Falls, SD City of Snoqualmie, WA City of South Jordan, UT	Guilford County, NC Hamilton County, IN Louisville Jefferson County Metropolitan Government, KY Metro Nashville Davidson County, TN Minnehaha County, SD Mobile County Health Department, AL Monroe County, FL
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City of Bloomington, MN	City of Irving, TX	City of Spokane Valley, WA	Montgomery County, PA
City of Boca Raton, FL	City of Kirkwood, MO		Outagamie County, WI
City of Boulder, CO	City of Lawrence, KS	City of Sugar Land, TX	Peoria County, IL
City of Broken Arrow, OK	City of Long Beach, CA	City of Surprise, AZ	Person County, NC
City of Burlington, VT	City of Manassas, VA	City of Tampa, FL	Pitkin County, CO
City of Carrollton, TX	City of Mercer Island, WA	City of Tucson, AZ	Saginaw County, MI
City of Chaska, MN	City of Mesquite, TX	City of Waynesboro, VA	Scott County, IA
City of Cleveland, OH	City of Midland, TX	City of Weatherford, TX	Sussex County, DE
City of College Station, TX	City of Milpitas, CA	City of Wilmington, NC	Syracuse City School District, NY
City of Coral Springs, FL	City of Minot, ND	Clark County, WA	Town of Greenwich, CT
City of Corona, CA	City of Ormond Beach, FL	Coachella Valley Association of Governments, CA	Tri-County Health Department, CO
City of Duncanville, TX	City of Oxnard, CA	Coachella Valley Water District, CA	Village of Oak Park, IL
City of Detroit, MI	City of Pearland, TX	Coconino County, AZ	Washington County, MN
City of Dover, DE	City of Philadelphia, PA	Goochland County, VA	Washtenaw County, MI
City of Edina, MN	City of Prior Lake, MN		Waukesha County, WI
	City of Puyallup, WA		Yamhill County, OR

Business Process Improvement Experience (Category 4)

Analyzing current processes and integrating best practices is the first step in achieving efficient business and technical processes. Our team is experienced with documenting both current and future business processes and identifying tasks that are time-consuming and/or that create bottlenecks or redundancies within processes.

We have extensive experience working on large and complex business process engagements. As part of our approach, we involve stakeholders early and often throughout the project, which helps build awareness for change and promote greater buy-in and support for recommendations and changes in the future (“to-be”) environment.

The basic premise that we use when evaluating new and existing business processes, technologies, and organizational structures is simple: we work with the client to retain those processes, systems, and staffing structures that are functioning optimally, and we introduce optimization recommendations only when existing processes, systems, and/or staffing models are not meeting the needs of the institution. In process work sessions, we create diagrams to show detailed differences between manual, paper, and electronic process steps; decision points; pain points; and potential system requirements. The “as-is” diagrams serve as a starting point for further discussion of “to-be” opportunities and identification of preliminary system requirements.

From our experience, it is the processes involving multiple departments or stakeholders or where there is no consensus or consistency in how processes are followed that are best suited for business process mapping.

BerryDunn has provided business process consulting services to more than 200 clients in Product Category 4, whether the primary contract scope was business process analysis and mapping, or a factor in the scope of the engagement. Table 4, on the following pages, is a representative list of relevant business process improvement consulting projects with which our firm has assisted.

Table 4: Representative List of Relevant Experience

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
Athens-Clarke County, Georgia	✓			✓
Berks County, Pennsylvania	✓			✓
Calumet County, Wisconsin	✓			✓
Carver County, Minnesota	✓			✓
Chesterfield County, Virginia	✓			✓
Chicago Metropolitan Agency for Planning, Illinois (CMAP)	✓			✓
City of Alameda, California	✓			✓
City of Albany, Georgia		✓	✓	✓
City of Amarillo, Texas	✓			✓
City of Attleboro, Massachusetts	✓			
City of Aurora, Colorado	✓			✓
City of Aventura, Florida	✓			✓
City of Avondale, Arizona	✓			✓
City of Bangor, Maine	✓	✓	✓	
City of Beaverton, Oregon	✓	✓	✓	✓
City of Bettendorf, Iowa	✓			✓
City of Bloomington, Minnesota	✓			✓
City of Boca Raton, Florida	✓			✓
City of Boston, Massachusetts	✓	✓		
City of Boulder, Colorado	✓			✓
City of Bozeman, Montana	✓	✓	✓	
City of Brighton, Colorado	✓			✓
City of Broken Arrow, Oklahoma	✓			✓
City of Burlington, Vermont	✓	✓		✓
City of Cedar Falls, Iowa	✓			✓
City of Cedar Hill, Texas	✓			✓

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
City of Cedar Park, Texas	✓			✓
City of Chaska, Minnesota	✓			✓
City of College Station, Texas	✓			✓
City of Cooper City, Florida		✓	✓	
City of Coral Springs, Florida	✓			✓
City of Creswell, Oregon	✓			✓
City of Danville, Virginia	✓			✓
City of Desoto, Texas	✓			✓
City of Detroit, Michigan	✓	✓		✓
City of Dover, Delaware	✓			✓
City of Duluth, Minnesota		✓	✓	✓
City of Duncanville, Texas	✓			✓
City of Edina, Minnesota	✓			✓
City of Eugene, Oregon	✓	✓	✓	
City of Fairfax, Virginia	✓			✓
City of Fargo, North Dakota	✓			✓
City of Farmers Branch, Texas	✓			✓
City of Fernandina Beach, Florida	✓	✓	✓	
City of Foley, Alabama	✓	✓	✓	
City of Fort Worth, Colorado	✓	✓		✓
City of Fort Worth, Texas	✓		✓	
City of Fountain Valley, California	✓			✓
City of Frisco, Texas	✓	✓	✓	✓
City of Gahanna, Ohio	✓			✓
City of Gainesville, Florida	✓	✓	✓	
City of Gaithersburg, Maryland	✓			✓
City of Galveston, Texas	✓			✓

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
City of Glendale, Arizona	✓			✓
City of Grand Prairie, Texas	✓			✓
City of Gresham, Oregon	✓	✓	✓	✓
City of Groveland, Florida		✓	✓	
City of Helena, Montana	✓			✓
City of Hillsboro, Oregon	✓			✓
City of Independence, Missouri	✓			✓
City of Irvine, California	✓			✓
City of Irving, Texas	✓			✓
City of Issaquah, Washington	✓			✓
City of Jacksonville, North Carolina	✓			✓
City of Kirkwood, Missouri	✓			✓
City of Lakeville, Minnesota	✓			✓
City of Lauderdale, Florida		✓	✓	
City of Largo, Florida	✓	✓	✓	
City of Lawrence, Kansas	✓			✓
City of Leander, Texas	✓			✓
City of Livermore, California	✓			✓
City of Long Beach, California	✓			✓
City of Manassas Park, Virginia	✓			✓
City of Mansfield, Texas	✓			✓
City of Margate, Florida	✓	✓	✓	
City of Mercer Island, Washington	✓			✓
City of Mesquite, Texas	✓			✓
City of Miami Beach, Florida	✓	✓	✓	✓
City of Midland, Texas	✓			✓
City of Midvale, Utah	✓			✓

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
City of Milton, Georgia		✓	✓	
City of Minot, North Dakota	✓			✓
City of Newton, Iowa		✓	✓	
City of Northglenn, Minnesota	✓	✓	✓	✓
City of Ormond Beach, Florida	✓			✓
City of Oxnard, California	✓	✓	✓	✓
City of Pearland, Texas	✓			✓
City of Pensacola, Florida		✓	✓	
City of Pasco, Washington		✓	✓	
City of Philadelphia, Pennsylvania	✓			✓
City of Plano, Texas	✓			✓
City of Puyallup, Washington	✓			✓
City of Redding, California	✓			✓
City of Redlands, California		✓	✓	
City of Richland, Washington	✓	✓		✓
City of Rockville, Maryland	✓	✓		
City of Scottsdale, Arizona	✓			✓
City of Shawnee, Kansas			✓	
City of Simi Valley, California	✓			✓
City of Snoqualmie, Washington	✓			✓
City of Spokane Valley, Washington	✓			✓
City of Stillwater, Minnesota	✓	✓	✓	✓
City of Sugar Land, Texas	✓			✓
City of Surprise, Arizona	✓			✓
City of Tampa, Florida	✓			✓
City of Tempe, Arizona	✓			✓
City of Toledo, Ohio	✓			✓

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
City of Tucson, Arizona	✓	✓	✓	✓
City of Wausau, Wisconsin		✓	✓	
City of Weatherford, Texas	✓			✓
City of West University Place, Texas	✓			✓
City of Westminster, Colorado		✓	✓	
City of Wheat Ridge, Colorado	✓			✓
City of Wilmington, North Carolina	✓			✓
City of Worcester, Massachusetts	✓			✓
City of Zephyrhills, Florida	✓			✓
Chesterfield County, Virginia	✓			✓
Clark County, Washington	✓			✓
Doña Ana County, New Mexico	✓			✓
Ellis County, Texas	✓			✓
Guilford County, North Carolina	✓			✓
Hamilton County, Indiana	✓			✓
Henrico County, Virginia	✓			✓
Henrico County, Virginia	✓			✓
Jefferson Parish, Louisiana	✓			✓
Kaua'i County, Hawai'i	✓			✓
Kern County, California	✓			✓
King George County, Virginia	✓			✓
Klickitat County, Washington	✓	✓	✓	
Lafayette Consolidated Government, Louisiana	✓			✓
Lake County, Illinois	✓			✓
Lane County, Oregon		✓	✓	
Laramie County School District One, Wyoming	✓			✓

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
Louisville/Jefferson County Metro, Kentucky	✓			✓
Maine Municipal Association	✓	✓	✓	
Maui County, Hawai'i	✓			✓
Manatee County, Florida	✓	✓	✓	
Maryland National Capital Park and Planning Commission			✓	
Mesa County, Colorado	✓			✓
Metropolitan Government of Nashville and Davidson County, Tennessee	✓			✓
Metropolitan Parks Tacoma, Washington	✓	✓	✓	
Minnehaha County, South Dakota	✓			✓
Mobile County Health Department, Alabama	✓	✓	✓	✓
Monroe County, Florida	✓	✓	✓	
Montgomery County, Pennsylvania	✓			✓
Orange County, North Carolina	✓	✓		
Ottawa County, Michigan	✓	✓		✓
Peoria County, Illinois	✓			✓
Person County, North Carolina	✓			✓
Pitkin County, Colorado	✓	✓	✓	✓
Powhatan County, Virginia	✓			✓
Saginaw County, Michigan	✓			✓
Scott County, Iowa	✓			✓
Sonoma County, California	✓	✓	✓	✓
Stearns County, Minnesota	✓			✓
Town of Christiansburg, Virginia	✓	✓		✓
Town of Longboat Key, Florida	✓	✓	✓	

Client	Project Focus(es)			
	Processes	Policies	Organization	Technology
Town of Mount Pleasant, South Carolina	✓			✓
Town of Yarmouth, Maine	✓	✓	✓	
Town of Wells, Maine	✓	✓		
Travis County, Texas	✓	✓	✓	
Tri-County Health Department, Colorado	✓			✓
Village of Oak Park, Illinois	✓			✓
Village of Schaumburg, Illinois	✓	✓		
Wake County, North Carolina	✓			✓
Washtenaw County, Michigan	✓			✓
Wilmette Park District, Georgia	✓	✓	✓	
Yamhill County, Oregon	✓			✓

Additional Services

OCM Services

Our OCM services are inherent in our project management practices, and our OCM work will be integrated throughout all activities related to Categories 2, 3, 4, 5, and 6. Our change management approach can be found in the [Sample Approach](#) section.

OCM is carefully integrated into our project management approach when conducting system implementation projects. BerryDunn has found that migrating from legacy systems to more modern tools requires a significant change in how work will be performed. Stakeholders' willingness to adopt new processes and tools plays a crucial role in the success—or failure—of the new system(s). It is natural that with significant change comes resistance. Some stakeholders may suffer from change saturation, or, if a previous change has gone negatively, they may resist supporting the efforts to move forward. While OCM is present in all implementation projects, clients' level of support in change management varies depending on a variety of factors.

To showcase a few projects where OCM was a specifically contracted item, rather than an integrated component in ERP system implementation projects, we provide the following in Table 5 below:

Table 5: Sample OCM Experience

Client	Project
City of Amarillo, Texas	ERP Consulting
City of Cleveland, Ohio	HCM and HR Information System Implementation
City of Spokane Valley, Washington	Financial Management Software Selection and Implementation Oversight
Gifford Medical Center, Vermont	System Selection and Implementation Assistance
Louisville Jefferson County Metropolitan Government, Kentucky	ERP System Selection OCM Services and Implementation Project Management
Minnesota State University, Minnesota	Quality Assurance for ERP Implementation, Change Management inclusive
Monroe County Clerk, Florida	ERP Consulting Services and OCM Oversight
Nashville Davidson County Metropolitan Government, Tennessee	Systems Consulting, Business Process Improvement, and Change Management
Syracuse City School District, New York	ERP System Selection, OCM, and Project Management for Implementation
University of Vermont Health Network, Vermont	OCM Consulting for Electronic Health Record (EHR) Implementation
University of Wisconsin, Wisconsin	Quality Assurance for ERP Implementation, Change Management inclusive
Yamhill County, Oregon	ERP Consulting

CRM/311 Services

Our consulting team has extensive experience leading our clients through engagements that involve CRM technologies. Table 6, below, highlights a sample of more recent experience providing comparable services, including assessing local government client needs related to a variety of CRM environments and leading those clients through business process optimization or software system optimization initiatives. This experience includes public-sector clients with clearly defined CRM, 311, complaint submittal, and service request requirements in their RFPs.

Table 6: Sample CRM Experience

Client	Description
City of Philadelphia, Pennsylvania (1,581,000)	BerryDunn assisted the Streets Department with developing functional and technical requirements for a Right-of-Way Permitting system and a Code Violation Notice system. The scope of the Right-of-Way Permitting system included public access requirements, including the ability to submit applications and requests. The scope of the Code Violation Notice system included a required real-time interface to the City's 311 system. BerryDunn also assisted the Water Department with developing functional and technical requirements for a permitting system. This included public portal requirements to support online application submittal.
City of San José, California (956,400)	Customer Service Capability Design and CRM Selection. San José engaged BerryDunn to help improve customer service delivery and conduct a transformation plan for an upcoming Salesforce implementation. We assisted the City in understanding its current state and establishing a baseline understanding for identifying gaps and improvement opportunities. Our work included current state diagramming and future state delivery of customer services and building a transformation plan identifying what internal resources would be needed and estimated costs to achieve its desired state. We also assisted in developing future functionality and documenting future customer service delivery with accompanying applications.
City of Sunnyvale, California (150,800)	CRM System Assessment. The City retained BerryDunn to help its departments deliver a new, higher level of customer service through a new, modern CRM system. Because of its size and complexity, the City requires seamless self-service across departments, accessibility, multiple communication options, and effective request and concern tracking. We are assisting the City in assessing its current Microsoft Dynamic system and engaging the community and City staff to identify unmet needs and potential improvements.
City of Tampa, Florida (408,500)	Customer Experience Strategy Consulting Services and CRM System Implementation. BerryDunn assisted the City in its implementation of Salesforce, which is used to provide customer service and contact management to residents and includes a customer portal, external integrations, and a mobile application. The process to replace the City's aging legacy system touched more than 20 departments and more than 75

Client	Description
	varying services requests. The implementation included both improved business processes and flows and customer outreach and responsiveness.
Louisville/Jefferson County Metropolitan Government (Metro), Kentucky (740,000)	Enterprise CRM Assessment. Metro engaged BerryDunn to better understand how it interacts with customers and citizens and determine if an enterprise CRM might improve service delivery and efficiency. We are conducting discovery meetings with Metro staff and external stakeholders, exploring the daily use of current tools and technology to understand how Metro may better service its customers while also developing a complete understanding of the technology landscape. After assessing the current state, we will present a recommended course of action that will advance Metro toward its desired future state, including descriptions of actions, anticipated benefits of each action, alternatives, and resource requirements.

CIS/UB Services

BerryDunn provides a range of consulting services to municipal water utility, public works, and related departments. We understand the complexity of the services, the stakeholder groups, and the systems and processes that support the delivery of services to customers. Table 7, below and on the following pages, presents highlights of our relevant experience. We are happy to provide more information about any of the projects listed at NCTCOG's request.

Table 7: Utilities, Public Works, and Related Experience

Client	Worked Performed
Aurora Water, Colorado	CIS Consulting and UB Implementation Project
City of Allen, Texas	UB Project Oversight
City of Biddeford, Maine	Wastewater Billing Process Review
City of Boca Raton, Florida	UB System Selection and Implementation Assistance
City of Boston, Massachusetts	Business Process Mapping and Improvement of Right-of-Way Coordination and Management
City of Bozeman, Montana	Engineering Plan Review Fee Review Study
City of Broken Arrow, Oklahoma	Asset Management, and UB System Implementation Project Management
City of Buckley, Washington	Comprehensive Review of Utility Bills
City of College Station, Texas	ERP Assessment, Business Plan, System Replacement, and Implementation Project Management for Integrated Finance, UB, Community Services, and HR System

Client	Worked Performed
City of Grants Pass, Oregon	ERP Consulting Services including CIS and UB System Replacement
City of Denton, Texas	Enterprise Asset Management (EAM) System Needs Assessment and System Selection Assistance
City of Irvine, California	Asset Management and Work Order Needs Assessment and System Selection Assistance
City of Issaquah, Washington	UB Implementation Advisory Assistance
City of Mansfield, Texas	Community Development (CD) and Work Order Needs Assessment and System Selection Assistance
City of Pearland, Texas	Facilities Division Staffing Study Services
City of Philadelphia, Pennsylvania	Municipal Street Addressing Process Review
City of Philadelphia, Pennsylvania	Philadelphia Water Permit Tracking Replacement System
City of Rockville, Maryland	CD and Work Order Business Process Mapping, Analysis, and Training
City of Richland, Washington	UB Process Analysis
City of Santa Fe, New Mexico	UB System Implementation Project and Point-in-Time Assessment
City of Sioux Falls, South Dakota	EnerGov Review
City of Surprise, Arizona	UB Implementation Project Management
City of West Jordan, Utah	ERP/CD System Selection
City of Wilmington, North Carolina	Work Order and CD Implementation Project Management
Irving Water, Texas	ERP and UB System Selection and Implementation
Town of Smithfield, Rhode Island	Public Works Organizational Assessment
Town of Smithfield, Rhode Island	Water and Sewer Rate Study

Community Development and Asset Management Services

BerryDunn has vast firsthand experience working with municipal clients to assess community development and asset management software, including permitting, plan review, land management, and asset management systems. This software is required to carry out functions such as planning, permitting, code enforcement, and

fleet, facility, and road management. As necessary, we have also assisted with related system selection and implementation efforts. Our range of community development and asset management and other relevant department-specific system assessment and implementation work is indicated in the relevant engagements highlighted in Table 8.

Table 8: Summary of Relevant Public-Sector System Selection Experience

Client	Project Details
City of Beaverton, Oregon	BerryDunn worked with the City to provide land management system needs assessment and system selection consulting, which included a current environment assessment and recommendations report, requirements and RFP development, system selection assistance, and contract negotiation assistance. BerryDunn was later engaged to provide implementation project management services during the City's Infor implementation.
City of Boca Raton, Florida	Our team worked with the City to implement a system for land management, planning, permitting, inspections, business licensing, and code enforcement functions, which followed selection activities (requirements definition, RFP development, and procurement assistance).
City of Broken Arrow, Oklahoma	The City of Broken Arrow engaged BerryDunn to assist in its selecting replacement systems for ERP, UB, planning and permitting, and public safety functions. We helped the City in developing functional and technical requirements, as well as the development of its RFP. Following receipt of proposals, BerryDunn assisted the City in system selection, including the development of proposal summary memos, short-list identification, and demonstration facilitation, followed by contract negotiation assistance. BerryDunn was also chosen by the City to assist with the implementation of selected planning and permitting, asset management, UB, ERP, and CAD/RMS systems.
City of Denton, Texas	BerryDunn worked with the City to develop an IT Strategic Plan, which identified a need to replace the City's existing EAM system. The City selected BerryDunn to lead this initiative. We surveyed users and conducted fact-finding work sessions across multiple departments using disparate EAM systems including InforEAM, Cartegraph, CityWorks, IBM® Maximo, and FasterWeb. We then developed a needs assessment report, developed citywide functional and technical requirements, developed an RFP, and assisted with vendor selection.
City of DeSoto, Texas	BerryDunn conducted an assessment of current software needs and assisted the City with the development of an RFP and selection of a replacement software vendor.
City of Farmers Branch, Texas	BerryDunn helped the City define requirements and release an RFP to select an enterprise system replacement, including planning, permitting, and code enforcement as functional areas. Our team also helped the City implement its chosen solution.
City of Fredericksburg, Virginia	The City worked with BerryDunn to develop an enterprise RFP to include planning, permitting, inspections, and code enforcement as functional areas.

Client	Project Details
	Our team also conducted as-is business process diagramming as part of our selection activities.
City of Frisco, Texas	Our team provided electronic plan review (EPR) system consulting, including as-is process diagramming, options analysis, and system selection assistance. BerryDunn is currently providing project management oversight as the City implements Avolve ProjectDox.
City of Irvine, California	BerryDunn is currently assisting the City with a permit software needs assessment, procurement, and implementation project. This project involved conducting a current environment assessment, reviewing previously developed requirements and RFP documents, developing an updated RFP Package, and providing system selection assistance. BerryDunn is currently providing implementation project management support.
City of Irvine, California	Our team is currently assisting the City's Department of Public Works and Transportation as it selects a new work order management system. This system will serve multiple divisions, including but not limited to facilities and rehab, fleet services, streets, landscape, traffic operations, neighborhood traffic, and administrative services. To date, we have assessed the Department's current and future needs, identified pre-qualified vendors, and developed RFP documents. We are currently assisting with system selection and will provide contract negotiation and award assistance.
City of Mansfield, Texas	BerryDunn provided the City with support during its CD and EAM system selection process. This involved developing an RFP, assisting with vendor selection, and providing contract negotiation support.
City of Mesquite, Texas	BerryDunn led a land management and CD system needs assessment and system selection project, which included RFP development, system selection assistance, and contract negotiation assistance.
City of Philadelphia, Pennsylvania	BerryDunn partnered with the City to help the Philadelphia Parks and Recreation Department (PPR) transition from a work order and asset management system that had been in place for seven years. PPR sought a new system that would better handle the size of its environment, focus on asset-level management, and leverage technological advancements. It desired a cloud-based system that could integrate with geographical information system (GIS) systems, handle inventory management, and improve work order management capabilities. We worked with PPR to assess its current state, define its desired future state, develop requirements, analyze the vendor marketplace, and recommend next steps.
City of Plano, Texas	The City first selected BerryDunn to provide business process improvement services to its Building Inspections Department with a goal to increase efficiency, intra-department cooperation, and external transparency during its permitting and service delivery processes. The City then contracted BerryDunn to assist with the selection of a new CD system—including RFP development, vendor selection, contract negotiation assistance, and implementation—and later enlisted BerryDunn to conduct an assessment and gap analysis of the

Client	Project Details
	new system. BerryDunn is currently providing implementation project management support.
City of Scottsdale, Arizona	Our team is currently assisting the City through the implementation of a replacement system to manage planning, permitting, inspections, EPR, and code enforcement functions. We conducted a current environment assessment, documented current business processes, developed requirements, and developed an RFP.
City of Tucson, Arizona	To help the City select and implement a new CD system, BerryDunn conducted a needs assessment, developed an action plan, defined requirements, developed the RFP, assisted with system selection activities, and provided contract negotiation assistance.
City of Wilmington, North Carolina	To assist the City in selecting and implementing an enterprise system, asset management, and work orders as functional areas, BerryDunn conducted a current environment needs assessment, defined requirements, developed an RFP, facilitated selection activities, and guided contract negotiation. Our team assisted with the implementation of the City's chosen system.
City of Woodinville, Washington	The City, on behalf of its Development Services and Public Works Departments, selected BerryDunn to assist with implementing identified improvements; update policies, procedures, and permit review tools; and reconfigure its Accela permit review tracking software.
City of Vancouver, WA	The City contracted BerryDunn to assess its use of Infor Public Sector with a goal of identifying root causes of process and/or system deficiencies, documenting opportunities for improvement in current business processes, identifying gaps in the current system, and evaluating whether an upgrade and/or replacement was necessary. In-scope departments included community development, public works, and utility billing.
Doña Ana County, New Mexico	BerryDunn worked with the County's Community Development Department to assess its needs with regard to a new land management software for building permit review and inspections, code enforcement, business registration, and land use cases, as well as develop an RFP and assist with vendor selection and contract negotiations.
Kern County, California	BerryDunn is currently working with the County to optimize its building permit processes. Throughout this permit process improvement project, our team has focused on improving the County's use of Accela.
Maui County, Hawai'i	The County selected BerryDunn to refine its Department of Parks and Recreation's permitting software needs and requirements and support the acquisition of a new software system. Our work included reviewing a draft RFP, conducting research to understand the Department's needs, finalizing the RFP, and assisting with system selection.
New Kent County, Virginia	BerryDunn conducted an ERP needs assessment project that included conducting a current environment assessment and development of functional and technical requirements for a replacement system, including planning, permitting, and code enforcement.

Client	Project Details
Pitkin County, Colorado	The County requested the completion of a needs assessment, definition of functional and technical requirements, RFP development, and system selection assistance as part of replacing its permitting system. The County replaced its legacy system with support from BerryDunn.
Thurston County, Washington	BerryDunn is currently conducting a needs assessment of the Thurston County Public Works' (TCPW's) asset management system, VUEWorks. BerryDunn is working with TCPW to explore its current and future asset management processes through document and data review, workshop facilitation, process improvement analysis, and current and future state business process mapping. Our goal is to define functional, non-functional, and technical requirements and to determine the best path forward, assuming the County will need to procure and implement a modern asset management system.

IT Strategic Technology Planning Services

IT strategic planning is a core service of our Technology Management Practice Group and can help reduce technology risk exposure resulting from software obsolescence, hardware/technical infrastructure obsolescence, and limited technical resources. In Table 9, below and on the following pages, lists local government clients for whom we have provided strategic assessments or technology planning services.

Table 9: Relevant BerryDunn IT Strategic Planning Engagements

Client	Project Description
Carroll County, Maryland	Strategic Technology Planning
City and Borough of Juneau, Alaska	IT Strategic Planning
City of Allen, Texas	IT Strategic Planning
City of Belmont, California	IT Strategic Planning
City of Bettendorf, Iowa	Citywide Technology Assessment
City of Bloomington, Indiana	IT Strategic Planning
City of Burleson, Texas	IT Strategic Planning
City of Cambridge, Massachusetts	IT Staffing Assessment and Realignment
City of Coronado, California	IT Strategic Planning
City of Denton, Texas	Citywide IT Strategic Planning
City of Harrisonburg, Virginia	Strategic Technology Planning
City of Jackson, Mississippi	Strategic Technology Planning
City of La Vista, Nebraska	Strategic Technology Planning
City of Louisville, Colorado	Strategic Technology Planning
City of Loveland, Colorado	Strategic Technology Planning

Client	Project Description
City of Midland, Texas	IT Strategic Planning
City of Pasco, Washington	Information Services Organizational Assessment and Master Planning
City of Rio Rancho, New Mexico	Technology Needs Assessment
City of Santee, California	Strategic IT Master Planning
City of South Jordan, Utah	Strategic Technology Planning
City of Vancouver, Washington	IT Strategic Planning
City of Winchester, Virginia	Strategic Technology Planning
City of Worcester, Massachusetts	IT Strategic Planning
Dakota County, Minnesota	IT Strategic Plan for Community Services Division
Fairfax Public Schools, Virginia	Network Assessment
Galveston County, Texas	Comprehensive Technology Assessment and Strategic Technology Planning
Glynn County, Georgia	IT Department Opportunities and Risk Assessment
Lindbergh Public Schools, Missouri	Technology Services Assessment
Loudoun County, Virginia	Technology Staffing Analysis
Metro Parks Tacoma, Washington	IT Strategic Planning
Mobile County Health Department, Alabama	IT Strategic Plan for Health Department
Montgomery County, Pennsylvania	IT Staffing Assessment
Ottawa County, Michigan	Technology-Focused Business Process Analysis for Countywide Procurement
Somerset County Parks Commission, New Jersey	IT Assessment and Master Planning
Spokane Public Schools, Washington	Technology Assessment
Springfield Water and Sewer Commission, Massachusetts	IT Department Evaluation
Three Rivers Park District, Minnesota	Technology Systems Planning
Town of Farragut, Tennessee	IT Strategic Planning
Town of Greenwich, Connecticut	Strategic Technology Plan
Town of Mount Pleasant, South Carolina	IT Assessment and Reporting
Town of Prescott Valley, Arizona	IT and GIS Strategic Planning



Client	Project Description
Town of Weston and Public Schools, Massachusetts	IT Assessment
Waukesha County, Wisconsin	IT Staffing Analysis
York County Schools Division, Virginia	K-12 IT Systems Review

Technical Proposal

Description of Services as they Relate to Product Categories 2-6

In Table 13, we outline and describe our services as it relates to meeting or exceeding NCTCOG's and TXShare's member entities' needs in Product Categories 2-6. We would be happy to discuss these in more detail upon request.

Table 13: Ability to Meet the Needs of Categories 2-6

Product Category	Services
Category 2 Provide ERP Consultancy Services to assist NCTCOG or TXShare's research and preparation for ERP implementation	BerryDunn has over 30 years of experience helping clients navigate the life cycle experience from system selection to implementation. In fact, we have conducted more than 200 comparable engagements for a variety of public-sector clients. As such, we have a proven approach for conducting related projects, which can be customized and scaled to meet the specific needs of our clients. Our background in providing systems consulting services includes work with state, local, regional, K-12 public education, and special district government clients, as well as those in higher education, contributing to our strong ability to manage large-scale and highly complex system acquisition projects. Because we serve a wide array of organization types, we also have broad familiarity with the various systems that serve related functional and technical needs. Activities we support in the research and ERP implementation preparation phases include system planning, assessment, and gap analysis; requirements definition; RFI, RFP, and Request for Qualifications (RFQ) development; vendor evaluation and scoring; contract negotiations and approval; and more. From our more than 200 related projects, we have helped clients achieve success in their ERP systems environments. Beyond having a proven approach, lessons learned from comparable projects, and vast industry knowledge, we bring insight into how to best identify and mitigate risk and help prepare our clients for ERP implementation and help ensure success. Through this, we generate trust with our clients and their stakeholders, minimize change resistance, and help ensure projects stay on time and on budget, as well as progress at a healthy pace. Central to our approach is establishing a collaborative relationship with stakeholders in order to gain a thorough and realistic understanding of strengths, challenges, and opportunities in the current environment. We find that engaging a broad range of stakeholders throughout the planning process results in greater buy-in and long-term support for recommendations. This collaborative relationship also helps us adapt our approach to the unique needs and preference of each client. We understand that ERP planning can lead to significant changes. Our approach considers the importance of change management from the outset of the project and shapes the ways in which we communicate and engage stakeholders.
Category 3 Provide ERP Consultancy Services to implement or	BerryDunn is well-versed and deeply experienced in providing ERP implementation assistance, offering the ideal level of service to benefit the clients we serve. Implementation assistance is provided when clients have chosen a system to be implemented and support is needed to coordinate and lead efforts related to the vendor, client, and BerryDunn's project teams. We support a wide range of activities, including:

Product Category	Services
replace an ERP system	• Developing, reviewing, and managing implementation project documents (e.g., project charter, the vendor's implementation plans, stakeholder listings, risk management information and procedures, among others) • Managing the project scope, deliverables, and timeline • Managing task progress and completion • Coordinating resources to complete tasks • Serving as the primary point of contact for the vendor's and the client's project managers • Facilitating stakeholder orientation meetings • Holding monthly meetings with client leadership • Reviewing project budget • Reviewing vendor invoices • Collaborating with vendor and client technical teams • Facilitating workflow process development • Facilitating data conversion process • Facilitating software interface and integration development • Supporting vendor accountability • Providing risk management • Providing change management • Facilitating the user acceptance testing process • Facilitating oversight of vendor training • Conducting a project closeout work session We lead or assist with these activities and others depending on the level of involvement the client desires from the BerryDunn team. When providing full-time implementation project management, our project team acts as the implementation project manager. In this role, we identify project risks and issues, monitor project activities, provide recommendations to mitigate risks, and lead the coordination of vendor activities. There are minimal tasks owned by client stakeholders. This level of service assumes the client will provide a project management team that we will oversee. When providing part-time implementation project oversight, we act as an active advisory to an individual the client designates as project manager. We also lead select implementation activities we mutually agree upon and are likely to include project plan reviews, configuration and analysis support, testing, training, and production cutover support.
Category 4 Provide Standalone Review and Documentation Services for NCTCOG or TXShare Entity's current business	Business process review, mapping, and improvement are core services for BerryDunn. We have developed a methodology that draws upon philosophies and tools from Six Sigma and Lean, but we also leverage elements of other business process improvement methodologies. Our consultants have an eye toward how things can be done more efficiently and more effectively to better deliver expected results. Accordingly, as advisors to NCTCOG and TXShare entities, our focus on business process improvement will include continual assessment of project processes, as well as discrete, focused process improvement activities, including facilitating lessons learned meetings and process mapping sessions.

Product Category	Services
processes, process flows, process integration, and identification of pain points prior to their ERP implementation	We bring an impartial, objective, and cohesive methodology for gathering information from stakeholders and performing all activities. Our methodology combines engaging a broad, diverse group of stakeholders in information-gathering and iterative discussion, with our project team's independent review, research, and knowledge of the public-sector landscape and industry trends and best practices. Prior to engaging in activities with stakeholders, our project team will request and perform reviews of relevant project background information, so they have a foundation—and are prepared—for all meetings, making the meetings as effective and efficient as possible. Throughout all project phases, we will work collaboratively with key stakeholders to understand their perspectives and needs and seek alignment for a unified vision and plan for the future. Determining who we need to work with and how we need to work with them on this project is critically important for project success. Before engaging stakeholders, we will work to help ensure that the client has agreed to communication preferences; we expect that discussion about stakeholder involvement will be iterative and ongoing, so the topic will be revisited as needed, with a flexible approach to accommodate changes as activities progress. Our project team includes experienced facilitators who have the skills and knowledge necessary to establish credibility, build trust, elicit information, encourage collaboration, reach consensus, and develop buy-in with diverse groups of project participants. As such, our recommendations are met with minimal resistance and broad acceptance, thereby helping ensure a more streamlined future state for our clients.
Category 5 Provide ERP system upgrades and/or migrations from on-premises to cloud solutions and vice versa	BerryDunn provides a structured and collaborative approach for clients undergoing ERP system upgrades and/or migrations from on-premises to cloud solutions and vice versa. Central to our approach is engaging a broad range of stakeholders in the process, resulting in greater buy-in and support for the recommendations. Activities we support in this product category include developing a needs analysis report to provide the client with an objective analysis of the current systems' strengths and weaknesses and identification of options for the future systems environment. We will also perform a cost-benefit analysis containing the costs and benefits of modifying its current system. Should a client decide to modify its existing system, we would develop a system planning memo to include high level anticipated costs based on market research, resource requirements, and future ERP improvement scope and timeline considerations. Should the client decide to explore the vendor marketplace for a transformational change to a new ERP platform, we conduct a gap analysis and needs analysis report between the client's current ERP, a cost-benefit analysis of migrating and a project plan of with timelines, resources, and milestones. We would also include many of the activities related to Categories 2 and 3, including requirements definition; RFI, RFP development; vendor evaluation and scoring; contract negotiations and approval; as well as implementation support.
Category 6 Provide ERP Consultancy Services otherwise not anticipated in the RFP	OCM Stakeholders' willingness to adopt new processes and tools plays a significant role in the success—or failure—of related software systems projects. BerryDunn has observed resistance to change in virtually all our engagements. As such, our project management approach is carefully integrated with change management

Product Category	Services
	methodologies to promote buy-in and consensus for the project. We will work with the client to proactively address resistance by: • Engaging stakeholders at the right level throughout the project—from initial planning through implementation—to build understanding for the need for change and gain support from the people who will be using the future solutions and who are most familiar with current processes • Developing and executing a communications plan that considers the information needs of each stakeholder group • Documenting business processes and working with stakeholders to understand how their work will be performed in the future environment We have adopted the Prosci® change management methodology and have trained over 100 consultants to become Prosci® CCPs®. A central focus of the Prosci® change management approach is the belief that, for change to work in an organization, individuals must be willing to change and understand change. Additionally, according to research conducted by Prosci®, the likelihood of project success increases significantly and in alignment with the level of change management focus applied to the project. Even small increases in focus on change management, from “poor” to “fair,” are likely to have a positive impact on system adoption and project success. Consistent with the Prosci® methodology, clients can expect our change management approach to involve three stages: 1. Preparing for Change Developing change management strategies, based on input from client stakeholders on the existing environment. 2. Managing Change Overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan. 3. Reinforcing Change Evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes. Strategic Vision and Sponsor Coaching As part of our ERP readiness services, we will facilitate digital transformation visioning sessions to promote buy-in from leadership and identify a North Star vision for ERP engagements to serve as a guide throughout the project. During a visioning session, we will work with client leadership to identify the overarching digital transformation strategy for the project and discuss current challenges and goals the client may have to gain a deep understanding of the current digital landscape and prepare for change. Our sponsor readiness coaching helps prepare project sponsors for their role in ERP digital transformation projects. The goal is to create awareness and provide the tools necessary to help ensure superior performance outcomes. In our experience, conducting this coaching session at the beginning of a project proves most beneficial to the sponsors as well as the client and BerryDunn project teams. Related Systems Consultancy Services BerryDunn’s team of business process and software system experts have in-depth familiarity with related systems consultancy services, including: • HCM • Time & Attendance

Product Category	Services
	• UB/CIS • Permitting and Licensing • Asset Management and Work Order Systems • CRM/311 Many of these services are provided through our Community Development and Utility Operations Practice which focuses on municipal and county policies, processes, fees, and systems related to planning, zoning, permitting, inspections, development services, code enforcement, land management, work order, and asset management functions. This practice is composed of industry experts with both firsthand and project experience. As American Institute of Certified Planners (AICP)-certified planners, our team understands the importance of sound planning principles, community vision setting, and the need for innovative policies and regulations to carry out planning priorities. Our team has firsthand experience working with community development departments and asset management functions and regularly consults these departments as they assess current systems and processes, identify opportunities for improvement, and implement recommendations. Regardless of the system type, our experience focuses on helping ensure the technology enables the business process and supports the ultimate goals and objectives of serving the customers.

Sample Approach

We customize our approach to reflect our clients’ specific needs and the information that follows provides guidance for what NCTCOG and TXShare entities might expect of a project as it relates to Product Categories 2-6.

Guiding Methodologies

Project Management

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

Figure 3 illustrates the standards of project management as defined by performance domains and project delivery principles that are critical for effective delivery of project outcomes.

Figure 3: Performance Domains and Project Management Guiding Principles | PMBOK® Guide



Change Management

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

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

Figure 4: ADKAR Change Management Approach



We have adopted the Prosci® change management methodology and trained **over 100 consultants to become Prosci® Certified Change Practitioners (CCPs)**. A central focus of the Prosci® change management approach is the belief that, in order for change to work in an organization, individuals must be willing to change and understand change. Based on this belief, Prosci® developed the ADKAR change management approach, defined in Figure 4.

Consistent with the Prosci® methodology, the client can expect our change management approach to involve three stages, as described on the following page.

1: Preparing for Change

Involves developing of change management strategies, based on input from client stakeholders on the existing environment.

2: Managing Change

Involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan.

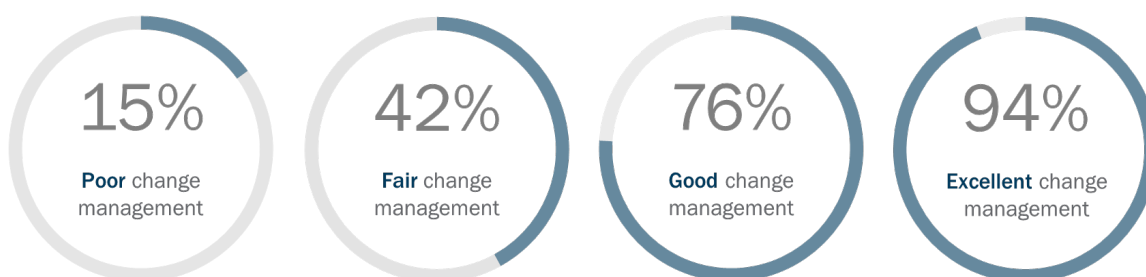
3: Reinforcing Change

Involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes.

The client can be confident in our flexibility while developing and executing our change management approach. We understand that no two engagements are exactly alike, and we believe that one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.

Additionally, according to research conducted by Prosci®, the likelihood of project success increases significantly and in alignment with the level of change management focus applied to the project. Figure 5, below, shows that even small increases in focus on change management, from "poor" to "fair," are likely to have a positive impact on system adoption and project success.

Figure 5: Change Management's Impact on Project Success



How We Will Interact with Your Team

When undertaking systems-related projects, we have found establishing an effective governance structure is key to successfully guiding project efforts, making key decisions, and helping manage risks and issues. Establishing a governance committee with clear roles, responsibilities, and lines of authority will help prevent project delays due to lack of decision-making—or worse yet, decisions being made without appropriate authority and/or key stakeholder inputs. We will discuss the project’s governance structure with the client—and make recommendations accordingly—during project initiation. We will also seek to understand the client’s authority to influence different stakeholders and to address the challenges identified so that we develop meaningful, realistic recommendations and an actionable, practical roadmap for the project. In the organizational chart in Figure 6 below, we highlight the project leadership and reporting structure a client can expect.

Figure 6: Sample Project Leadership and Reporting Structure

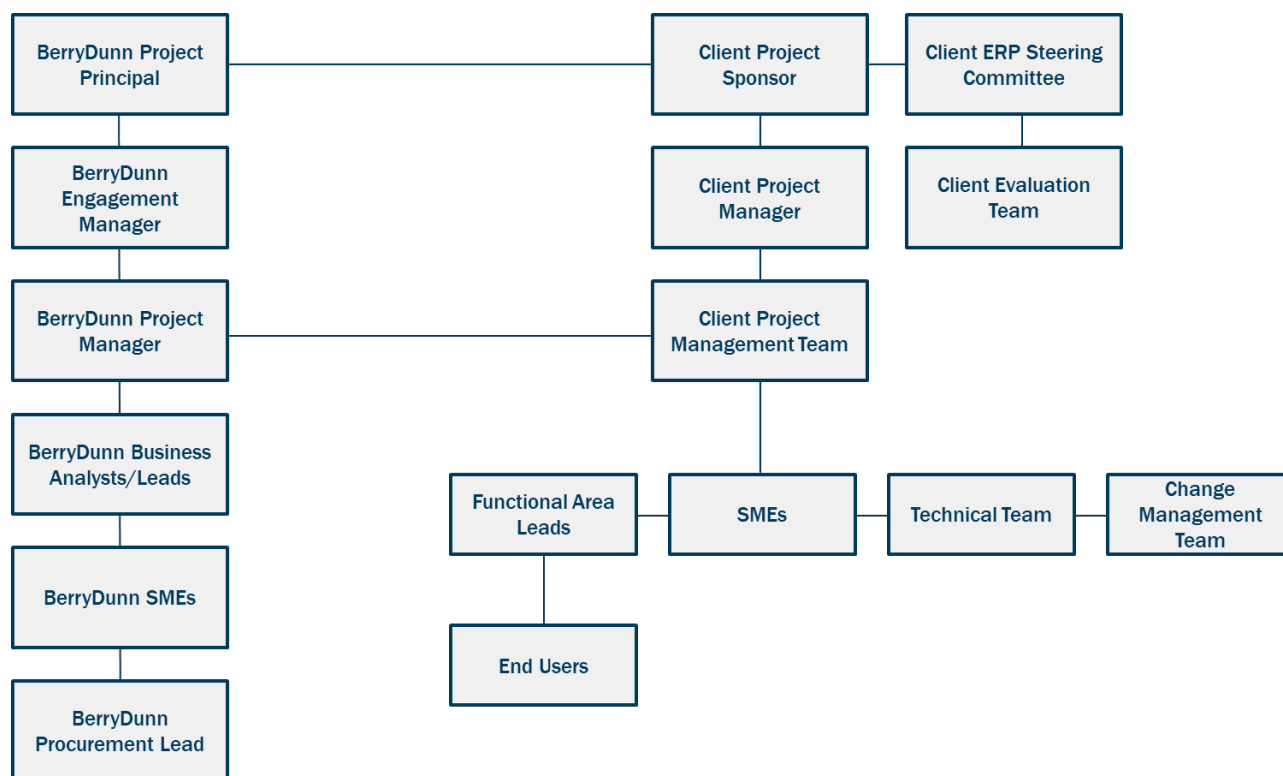


Table 10 identifies key BerryDunn roles within a typical systems project and their related descriptions, and how the project team will interface with NCTCOG and TXShare participating entities. In some cases, these roles are filled by single individuals, and in others, they are filled by groups of individuals. This approach to the project team organization allows the benefit of a single consistent resource in some roles and, in others, the benefit of being able to draw on the expertise of many.

Table 10: BerryDunn Roles and Descriptions

Role	BerryDunn Role Description
Project Principal	The project principal has overall responsibility for the services provided by BerryDunn. For this engagement, the principal will help ensure the commitment of our firm and appropriate resource allocation, and review and approve all deliverables in accordance with BerryDunn's quality assurance processes. The principal will also oversee project progress, the initiation and completion of tasks and milestones, meetings and information-gathering activities, the development of project deliverables, and the work of the BerryDunn project team.
Project Manager	The project manager will serve as the primary point of contact for the client during this engagement. The project manager will actively manage project progress and the initiation and completion of tasks and milestones, facilitate meetings and information-gathering activities, and lead the development of project deliverables.
Lead Business Analysts	The lead business analysts will lead the assessment of the client's current environment and the development of recommendations for future state processes and system requirements. As part of these efforts, they will lead fact-finding meetings, prepare status reports and project deliverables, and contribute knowledge when and where it will benefit the client the most.
Business Analysts	The business analysts will work closely with the BerryDunn team to provide support in analyzing the client's current environment, facilitate meetings, prepare status reports, and help ensure the timely completion of project deliverables.
Technical Business Analyst	The technical business analyst will support the BerryDunn project team with facilitating meetings, preparing status reports, and developing project deliverables in a timely manner. They will also take part in assessing the client's current environment and developing recommendations as it relates to any technical considerations the client might encounter, including potential integrations, requirements, and interfaces.
Procurement SME	The procurement SME will support the project manager in the completion of project tasks related to procurement, such as the development of an RFI, RFP, and contract negotiations.
Additional BerryDunn Resources	BerryDunn's Consulting Team includes more than 335 consultants who can help the project team with efforts related to fact-finding, research, and deliverable development as needed.

Table 11 identifies key client roles within a typical systems project, related descriptions, and how the client team will interface with BerryDunn.

Table 11: Client Roles and Descriptions

Role	Description/Responsibilities
Project Sponsor	• Provide executive support, sponsorship, and overall direction and tactical vision for the project • Commit/assign resources to the project • Participate in project kickoff meeting and stress goals and objectives for the project to client staff • Provide executive-level decision-making when needed and maintain overall responsibility for the project • Distribute communications, as necessary, that support the project and provide it with adequate visibility and priority
Project Manager / Project Lead	• Maintain overall responsibility for the project and act as main point of contact between BerryDunn and the client • Circulate deliverables for review and collect feedback, and provide signoff • Participate in the project kickoff meeting and stress goals and objectives for the project to client constituents • Participate in key work sessions • Assist in collecting background documentation and share with BerryDunn in advance of our work • Provide names and contact information for client employees involved in project
Project Team	• Prepare for interview(s) as needed • Provide necessary feedback and subject matter expertise to help inform BerryDunn's project deliverables • Participate in project meetings and work sessions • Review project deliverables
Steering Committee/ End Users	• Complete the web survey • Assist with compiling requested documentation • Participate in related fact-finding meetings • Review project deliverables associated with the analysis phase • Participate in requirements review work sessions • Participate in vendor demonstrations

Role	Description/Responsibilities
Evaluation Team and Contract Team	- Review vendor proposals and Proposal Executive Summary Memo - Participate in vendor scoring meetings - Participate in vendor demonstrations - Participate in vendor reference checks and site visits - Participate in vendor contract negotiations
Technical Team	- Participate in related fact-finding meetings - Review project deliverables associated with the analysis phase - Participate in requirements review work sessions - Participate in vendor demonstrations
OCM Team	- Assess organizational readiness - Assist with project communication efforts - Monitor change resistance

Implementation Assistance Roles

We are prepared to offer two potential project management implementation assistance options to lead or assist with various activities to support NCTCOG and TXShare entities at the level necessary and desired for their implementation projects. With **full-time management**, our project team will act as the implementation project manager, and there will be minimal project management tasks owned by stakeholders. This level of service assumes the client will provide a project management team that we will oversee. With **implementation oversight**, we will act as an active advisory to an individual the client designates as project manager. We will also lead select implementation activities we mutually agree upon.

One of the keys to project success is enabling the client's teams to take on appropriate roles and responsibilities and to make informed decisions for both implementation and long-term operational success and ownership of the software. Our project management approach is designed with this in mind. We will provide specialized expertise throughout the project. Throughout the implementation, we will bring our prior implementation and local government experience to provide a forward-looking perspective, reduce risk, and promote the achievement of the goals and objectives for the project. We anticipate being involved in the following key project management or oversight activities of the implementation, as shown in Table 12 below and on the following pages.

Table 12: Implementation Activities per Level of Service

No.	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
1	Reviewing the Project Plan and Schedule in conjunction with other project team members	✓		✓	

No.	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
2	Managing the project scope, deliverables, and timeline with assistance from other project team members	✓			✓
3	Helping to ensure that the project team stays focused, tasks are completed on schedule, and that the project stays on track	✓			✓
4	Coordinating project tasks with assistance from other project team members	✓			✓
5	Functioning as the main point of contact for the vendor's project manager, participating in daily project activities (when applicable), and tracking project tasks	✓			✓
6	Facilitating an implementation kickoff meeting	✓			✓
7	Holding monthly meetings with the client's Executive Committee to update project status and budget status, and to research a verdict on any escalated process decisions that need to be made	✓		✓	
8	Reviewing the project budget, including change orders, and the vendor's contract compliance	✓			✓
9	Facilitating the client's staff's development of workflow processes for each department		✓		✓
10	Facilitating the data conversion process with the vendor and client staff		✓		✓
11	Facilitating the development of software interfaces/integrations with the vendor and client staff		✓		✓
12	Working with the vendor and client staff and helping to ensure vendor accountability by: - Identifying any opportunities to leverage technical enhancements to improve the products and services delivered to the client - Facilitating the gathering and sharing of any technical information requested by the vendor	✓			✓
13	Providing risk management, including the following: - Identifying project risks - Developing mitigation strategies - Communicating project risks to client and vendor staff - Assigning key activities to mitigate or resolve project risks	✓			✓

No.	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
14	Providing weekly or biweekly tracking of the following: • Reporting of project risks and issues • Recently completed tasks and upcoming project activities	✓			✓
15	Providing change management oversight, including the development and maintenance of a Change Management Plan that may include the following: • Target State Definition • Change Structure and Governance Approach • Change Impact Assessment • Stakeholder (or User) Analysis • Communication Plan • Behavior Change Plan	✓			✓
16	Managing the user acceptance training (UAT) process, including: • Reviewing the vendor's test plan and any applicable test scripts • Providing on-site assessment of testing activities • Providing recommendations for modifications to the testing plan to increase the likelihood of success • Directing client staff in the development of tailored test scripts • Managing logistics related to scheduling UAT activities • Providing analysis of test results • Overseeing regression testing and required configuration changes	✓		✓	
17	Facilitating oversight of vendor training activities, including: • Reviewing the vendor's training plan and training materials • Overseeing vendor training activities • Providing recommendations for modifications to the training delivery • Providing feedback on the vendor's	✓		✓	

No.	Key Implementation Activity	Project Management		Project Oversight	
		Lead	Assist	Lead	Assist
	training documentation				
18	Providing go-live support	✓			✓

Addressing the Primary Components of an ERP System

BerryDunn is experienced with all the components of ERP systems as defined in Section 5.0 of the RFP, including accounting and financial management, HR, CRM, business intelligence (BI), supply chain management (SCM), manufacturing and logistics management, inventory management, and warehouse management as well as the other features associated with efficient ERP systems. We have assessed each functional area, are experienced with the associated modules, have developed RFPs to procure software systems, and assisted clients in implementing systems.

Below and on the following pages, we outline a high level approach to working with the primary components of an ERP system in Product Categories 2, 3, 4, 5, and 6 and the deliverables a client could expect for NCTCOG's review and consideration.

Representative Work Plan

We welcome the opportunity to discuss our approach in more detail at the appropriate time with NCTCOG. Our intent is to work with staff to help ensure we make the best use of a client's time. Ultimately, consistent collaboration can help promote buy-in and understanding for final recommendations. The overarching benefits a client can expect of our approach include:

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

Phase 0: Project Planning and Ongoing Management

Objectives:

Develop a clear and agreed-upon Project Work Plan and Schedule

Establish a process for updating the client on project progress, risk and issues, and upcoming tasks

Identify a North Star Vision and create a project vision map to serve as a guide throughout the project

Conduct sponsor readiness coaching to create awareness and provide necessary tools to help ensure superior performance and project outcomes

To establish a strong foundation for the project and help ensure a high level of quality and communication throughout the engagement, we will utilize project management best practices based on PMI®'s PMBOK® Guide and our experience conducting similar projects with clients throughout the country.

The client can expect our team to complete the following project activities:

- ▶ Thorough project planning, including an initial planning teleconference between BerryDunn's team and applicable staff to confirm project goals, objectives, and expectations

Phase 0: Project Planning and Ongoing Management

- ▶ Discussing our approach to managing communications, scope, risks, and resources, thereby preparing for common pitfalls and reaching agreement on how to address and help prevent issues
- ▶ Development of a Project Work Plan and Schedule reflecting our proposal and outlining the major tasks, timelines, and identified milestones.
- ▶ A visioning session with client leadership to identify the overarching digital transformation strategy for the project; during the session, we will discuss current challenges and goals to gain a deep understanding of the current digital landscape and prepare for change
- ▶ Project readiness coaching to help prepare client sponsor(s) for their role in the process
- ▶ Ongoing Project Status Meetings, which will describe activities and accomplishments for the reporting period, risk mitigation, deliverable reviews, scheduling discussions, and more

Deliverable 1. Project Work Plan and Schedule

Deliverable 2. Ongoing Status Updates and Communications

Phase 1. Current Environment Analysis

Objectives:

Gather staff feedback regarding opportunities and areas of concern and offer input that will augment specifications

Conduct a thorough evaluation of the current ERP system, including third-party applications and shadow systems

Identify current strengths and weaknesses created by current platform configurations and business processes

During Phase 1, our project team will virtually interview staff and review applicable documentation. We will use this information to analyze the current ERP environment. The client can expect our team to complete the following activities:

- ▶ Information request sheet and strengths, weaknesses, opportunities, and threats (SWOT) web survey. We will provide the client with an information request sheet to gather available documentation that will help us begin to assess the client's current state and develop fact-finding interview guides. These documents will also include an announcement memo and functional area listing. We will develop and distribute a SWOT web survey to understand issues and challenges with the client's current system(s). This survey will also include an OCM initial assessment.
- ▶ Virtual kickoff meeting. We will conduct a virtual kickoff meeting with the client's project team and identified stakeholders to discuss in greater detail the client's goals and objectives for the project.
- ▶ Fact-finding and business process analysis meetings. We will conduct meetings with client staff identified as current and future users of the ERP solution based on functional area, exploring their experiences in daily interaction with the system. Our goal is to review, evaluate, and document existing system functionality and understand processes that are critical or unique to the client.

We will develop a Current State Analysis that includes business practices and areas in which needs are not being met by the current ERP solution, areas for improvement provided by a new ERP solution, and recommended key decisions points.

- ▶ Business process mapping sessions. We will conduct highly collaborative business process analysis meetings by functional area, exploring stakeholders' experiences in daily interaction with the ERP system and business processes, along with any additional areas identified in the Current State

Phase 1. Current Environment Analysis

Analysis. Process mapping will include identification of waste, inefficiency, and pain points, as well as system flow between transactional and source systems of record, batch process instances, and manual integration point that could be automated. The purpose of these meetings is to review, evaluate, and document the client's existing processes.

- ▶ Develop as-is business process diagrams. After conducting the process mapping meetings, we will develop draft diagrams for the client's review.

Deliverable 3. Current State Analysis

Deliverable 4. As-Is Business Process Diagrams

Phase 2. Requirements Gathering and RFP Package Development

Objectives:

Issue a RFI to identify potential vendors and systems

Assist in estimation of short-term and long-term costs

Review, evaluate, and document existing systems and determine and document the functional and technical requirements to include in an RFP Package

Requirements definition and confirmation of requirements with client stakeholders via collaborative joint planning process (JRP)

Confirm knowledge and compliance with client procurement processes and policies

Develop an RFP Package

During Phase 2, our project team will develop and issue an RFI to identify potential vendors and systems likely to meet the client's requirements. This will help assist in the estimation of costs and help ensure that vendor proposals received align with the client's specific system needs and reflect our collective understanding of today's market and its capabilities. After the RFI is issued, we will develop an RFI Summary Memo which will compare vendor responses and provide the client with the full picture of qualifications, cost, and ability to meet needs in the vendor market. If desired, we will conduct industry benchmark research for best practices that are similar to the client's scope and use the findings as a guide when determining the differences between the current state of processes and industry best practices.

Prior to hosting sessions for requirements development, our procurement lead will meet with the client's purchasing agent to understand the procurement program the ERP selection process should follow. BerryDunn has developed a database of technical and functional requirements based on our experience with other governmental agencies, as well as our knowledge of ERP software system functionality and best practices.

Drawing from this database, we will make refinements based on those processes that are critical or unique to the client and develop Preliminary Functional and Technical Requirements. These requirements will support supplemental functionality requirements with key reporting, interface, and conversion enhancements. We will then facilitate a virtual JRP work session with client stakeholders and our project team members to review the preliminary requirements. We will reconvene many of the same stakeholders, organized by functional area, who met during fact-finding activities to discuss the future system capabilities and gather feedback on the critical needs of each area when determining rating criteria. Using the preliminary list, we will review and confirm each item as well as assign a relative criticality to communicate to vendors responding to the list as part of their RFP responses.

We will then develop an RFP Package that incorporates information pertaining to the history of the project, a high level description of the client's current environment, desired approach to implementing a new ERP

Phase 2. Requirements Gathering and RFP Package Development

solution, and Final Functional and Technical Requirements. We will work with the client to develop objective evaluation criteria, provide a scoring matrix, and assist in distributing the RFP Document to ERP vendors in the marketplace.

Deliverable 5. RFI Summary Memo

Deliverable 6. Preliminary Functional and Technical Requirements

Deliverable 7. Final Functional and Technical Requirements

Deliverable 8. RFP Package

Phase 3. Evaluation and Selection of ERP

Objectives:

Facilitate vendor demonstrations, evaluation, and system selection activities

Advocate for the client and assist in contract negotiations and approval with the chosen vendor

During Phase 3, our project team will assist the client with vendor demonstrations, evaluations, and system selection activities to include:

- ▶ Publication of the client's RFP through its preferred communications channels
- ▶ Respond to vendor questions and addenda
- ▶ Facilitate pre-demonstration conference calls
- ▶ Assist in the review of proposals
- ▶ Develop a Proposal Summary Memo of vendor proposals identifying key areas for evaluation and short-list vendors who meet the client's requirements and review the Memo with the client's project team
- ▶ Attend and facilitate vendor demonstrations and participate in scoring meetings from an objective, non-scoring standpoint and help the client prepare for reference checks and site visits

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

- ▶ Developing a draft contract
- ▶ Reviewing contract documents with the client's project team to help ensure that requirements are fully defined
- ▶ Participating during negotiations with the preferred vendor
- ▶ Supporting presentation development and delivery to client leadership as it relates to receiving approval and contract execution

We will assist the client with development of a scope of services for an ERP integrator to implement the ERP software for a subsequent RFP. Following a similar process for evaluating ERP vendor proposals, we will evaluate ERP SI proposals and provide a written report identifying key areas of evaluation and short-list vendors who meet the client's requirements. We will review the results with the client's project team.

Deliverable 9. Proposal Summary Memo and Short-List Identification

Deliverable 10. Contract Negotiations and Approval Assistance

Phase 4. Implementation Assistance

Objectives:

Work with the client to define the appropriate level of support needed for its ERP implementation, providing ongoing project management or oversight services that include change management activities, risk management, user acceptance assistance, oversight of training, and other tasks

Generate excitement, encourage support, and promote buy-in and consensus through stakeholder involvement

BerryDunn offers two potential implementation assistance service options for the client's consideration. We are happy to customize our approach to providing implementation assistance with the client at the appropriate time to help ensure we provide its desired level of support.

Full-Time Management

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

Implementation Oversight

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

Activities we support include but not limited to the following:

- ▶ Developing, reviewing, and managing implementation project documents (e.g., project charter, the vendor's implementation plans, stakeholder listings, risk management information and procedures, among others)
- ▶ Managing the project scope, deliverables, and timeline
- ▶ Managing task progress and completion
- ▶ Coordinating resources to complete tasks
- ▶ Serving as the primary point of contact for the vendor's and the client's project managers
- ▶ Facilitating stakeholder orientation meetings
- ▶ Holding monthly meetings with client leadership
- ▶ Reviewing project budget
- ▶ Reviewing vendor invoices
- ▶ Collaborating with vendor and client technical teams
- ▶ Facilitating workflow process development
- ▶ Facilitating data conversion process
- ▶ Facilitating software interface and integration development
- ▶ Supporting vendor accountability
- ▶ Providing risk management
- ▶ Providing change management
- ▶ Facilitating the user acceptance testing process
- ▶ Facilitating oversight of vendor training
- ▶ Conducting a project closeout work session

Phase 4. Implementation Assistance

Deliverable 11. Project Charter

Deliverable 12. Project Plan Review

Deliverable 13. Project Management Documents and OCM, Stakeholder, and Communication Plans

Deliverable 14. Implementation Activities

Deliverable 15. Project Closeout Memo

Additional Considerations

1. Description of the Proposer's process for responding to an order for product.

All BerryDunn awarded cooperative contracts are identified on our website here: [contract vehicles | BerryDunn](#). All interested parties can contact BerryDunn directly to utilize a cooperative contract. Prior to execution of the contract, BerryDunn will facilitate scoping discussions with the prospective client to develop a statement of work specific to the client's needs.

2. Description of the Proposer's process for delivering orders to respective clients.

Project initiation is signaled by acceptance of our proposal and successful negotiation of a contract. Once we have a signed contract, our project manager manages the project according to the agreed-upon work plan, schedule, and budget. We will develop a project schedule that is collaborative and confirmed by both the client and BerryDunn. We have an excellent track record of meeting deadlines and, as a standard practice, we only allow changes to the timeline, scope, or project fees based on changes that are documented and approved by the client.

When we receive a request for services, we identify team members based on several factors, including (but not limited to):

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

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

On fixed fee projects, our clients will not incur any additional costs associated with the process of reaching deliverable acceptance, and we will submit monthly progress invoices based on the work completed toward each deliverable.

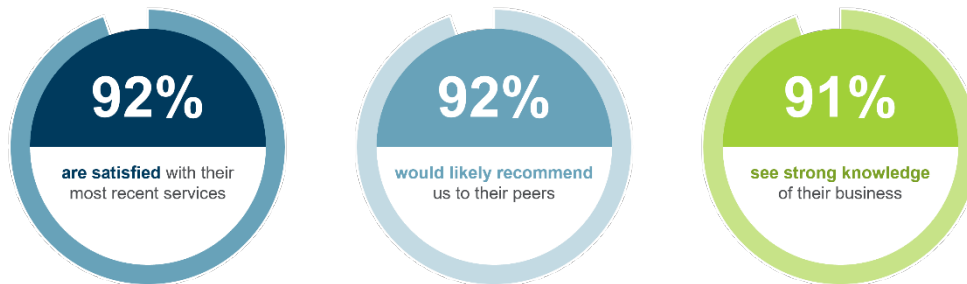
3. Description of the Proposer's customer satisfaction services, to include any warranty and/or repair capabilities.

We take the quality of our work seriously and aim to exceed clients' expectations of the value and timeliness of our communications, service delivery, and final work products. We strive to help assure quality by understanding your expectations, developing a reasonable and achievable project approach, gaining your concurrence on project tasks and timing, and using appropriate staff for each engagement.

To help measure client satisfaction, BerryDunn hires an independent firm to conduct an annual client satisfaction survey. The results of our 2024 survey show a high level of client satisfaction, with the following key metrics from the survey:

Overall Satisfaction:

More than 9 out of 10 clients report satisfaction with their most recent experience working with BerryDunn.



Quality of Work and Value of Advice

More than nine out of 10 clients report satisfaction with:

- the timeliness of BerryDunn's tax services
- the timeliness of BerryDunn's consulting services
- the thoroughness of BerryDunn's work and deliverables provided
- BerryDunn's industry- and organization-specific knowledge and expertise
- BerryDunn's ability to minimize disruptions and lead time given to respond to requests

Differentiators

More than four out of five clients say organization-specific expertise and breadth of services are what differentiates BerryDunn the most from other firms.

4. Description of the Proposer's invoicing process used by the Proposer.

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

5. Any assumptions made in responding to the requirements.

Based on our experience working with on system initiatives, we will approach projects with the following assumptions:

Executive Sponsorship

In order for systems projects to succeed, we will request that a client's leadership support and take an active role in key decision-making activities that will guide project direction. Sponsors must be visible, vocal, and active supporters, communicating the vision for the future. In the project initiation stage, we will work with client leadership to define the role they will play in effective communications, as well as to gain agreement on the governance and decision-making model employed on the project.

Adherence to Project Timeline

Collaboration with the client will be key in order to minimize schedule slippage and adhere to the project timeline. Factors may come into play that will impact the schedule, such as staff availability and time for leadership decision-making related to the project. We will work jointly with the client to mitigate these risks through advanced planning and accounting for known absences (such as holidays and vacations) in the schedule, as well as by providing regular updates on progress and relevant matters throughout the project. To

address delays over which our team and the client may have less control, we will offer flexibility in how and when we gather the information to keep the project on track.

Stakeholder Participation

It will be important for the client and key project stakeholder groups to dedicate sufficient resources to help ensure completion of project objectives in a timely manner. We understand that individuals contributing to the initiative have other daily responsibilities that are a priority. As part of our planning activities, we will partner with the client's team to determine the right staff to involve in each phase of this project based on factors such as subject matter expertise and availability. Our approach attempts to minimize the impact on client staff.

During project planning, we will also develop a high level estimate of staffing and resource needs for subsequent project activities and define the roles and time commitments required of each resource. This will allow impacted staff and their managers to adequately plan and prepare for their involvement, while helping to ensure that there is no gap in performance of their daily work.

OCM to Address Resistance

BerryDunn has experienced resistance to change in many of our engagements, reinforcing our belief that the management of change is crucial to the success of such an initiative. Based on this experience, we approach a client's initiative with the assumption that client staff have developed and adhered to existing processes over the course of several years and may be reluctant to change their way of doing things. Our team is qualified to provide change management structure to this project, in collaboration with the client.

It is important for client leaders and frontline managers and supervisors to understand the drivers of this resistance, including staff fears that they will not be able to perform their new responsibilities using a new system, their role will be diminished in importance, and/or they may lose their job—and proactively address them. It is also important to include staff's input into the project, so they feel more invested in the changes occurring. Communicating the value of the change by explaining what is in it for them is a critical component of moving staff along the change management path.

We will remain cognizant of, and sensitive to, these factors and perceptions in our communications, from project initiation to closeout. We will engage stakeholders early on through web surveys and meetings, as appropriate, throughout the project.

6. Any exceptions to the requirements. If there are no exceptions, Proposer shall explicitly state that no exceptions are taken to any part of this RFP. Offer must be in compliance with stated term and conditions unless NCTCOG accepts identified exceptions of the Proposer.

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

Section 1.02.7: As a privately held tax and business advisory firm, Berry, Dunn, McNeil & Parker, LLC is not required to have financial statements (audited or unaudited) relating to its own financial results and operations. Should the NCTCOG require additional information regarding Berry, Dunn, McNeil & Parker, LLC's financial stability, we would be pleased to provide that at your request.

Section 1.05 Indemnification: BerryDunn's legal team may request minor changes to the contract terms at the time of award, to meet our firm's risk standards and make sure our work is insurable.

7. Any special features or services the Proposer is proposing in response to the requirements that are included within the pricing provided.

While we have several proven methodologies that we apply to our projects, our experience has shown that each project is unique. We pride ourselves on developing a custom approach to each project that is carefully tailored to the needs of the client and the specific tasks at hand. While our project tasks may adjust to meet a project's unique needs, our subject matter experts' dedication to client service do not waver.

Answers to the Challenge Objectives

1. 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?

Providing ERP assessment, evaluation, selection, and contract negotiations support is a core service of our EDT practice. Through our assessment activities, it is very common to identify efficiency improvements our clients can achieve with their legacy system in preparation for replacement of their system. In addition to budget, financial management, financial reporting, and procurement systems replacement, we have assisted our clients with the replacement of HCM, UB, and permitting systems. Based on the needs of our clients and the associated scope of work, we have also assisted our clients with upgrading their legacy system.

2. 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?

Just as ERP system assessment is a core service of our EDT practice, providing IT strategic planning is a core service of our Technology Management Practice.

3. 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.?

In addition to ERP system assessments, it is very common for us to provide enterprise-wide system assessments for our clients. Through this process, we can develop an action plan with prioritized recommendations. It is also common for us to identify inefficiencies as the existing systems may not be fully utilized. Our IT strategic planning services typically identify duplication of effort as similar systems have been procured without a technology governance structure. If we are assisting our clients with the replacement of a legacy system, we will document all required system interfaces/integrations and will include in the RFP process for a new system.

4. 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?

BerryDunn has developed a database of functional and technical requirements based on our experience with other governmental agencies and security standards and our knowledge of software system functionality and best practices. Drawing from this database, we will make refinements for those processes that are critical or unique to the client. These requirements will support supplemental functionality requirements with key reporting, interface, and conversion enhancements, and include security functions that significantly strengthen financial controls. In our recent experience, those areas have significantly differentiated vendors' solutions and

required a specific focus in the selection activities. Our analysis typically results in about 75% of the requirements being defined upfront for most of our clients.

We will facilitate a series of JRP work sessions with client stakeholders and our project team members to review the preliminary requirements. We will reconvene many of the same stakeholders, organized by system/functional area that met during fact-finding activities, to discuss the future system capabilities and adherence to governmental and industry security standards. These sessions will also include one focused on the technical aspects involved with the client's project. Using the preliminary list, we will review and confirm each item and assign a relative criticality to communicate to vendors responding to the list as part of their RFP responses. We will also facilitate similar meetings to review potential interfaces and data conversion objects. Once these have been reviewed, we will update the list to final.

5. 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?

We can provide recommended improvements based on our knowledge of these enterprise systems. However, we would first need to complete our information-gathering assessment activities to identify the challenges in the current environment in order to determine recommended improvements. In this scenario, if it is one system that is providing financial management, asset management, and inventory functions, we would recommend utilizing the systems requisition, purchasing, receiving, and accounts payable functionality. This could also include service order or work order functionality.

6. What services can your firm provide for better tracking and management of the projects and assets?

As part of our information-gathering assessment activities, we would identify the current processes and systems in place to track projects and assets. If this is related to the financial tracking of projects (e.g. project accounting) and assets (e.g. additions, improvements, transfers, disposals), these are functions available in ERP systems. If this is related to project management tracking, these are functions typically provided in project management systems. Similar to asset management tracking, these are functions typically provided in asset management systems. With that being said, ERP systems will provide some project management and asset management tracking.

7. How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?

As vendors continue to transition to cloud-based Software as a Service (SaaS) models, this results in vendors moving away from customization and focus more on configuration. During the initial stages of the implementation, ERP vendors will facilitate business process sessions to identify alignment of business processes to the system's functionality. These processes are also tested at various points during the implementation. We prefer to attend vendor sessions, when and where applicable, to help drive discussions and decisions. Throughout the project, there will be decisions that will need to be made. We document these during the sessions and confirm these decisions, when and where applicable, with the project management team. We will make the client's Steering Committee aware of these decisions. In some instances, there will be decisions that functional leads may not have the authority to make and are escalated to the project team. There will also be instances when decisions need to be escalated to the Steering Committee as the project team may not have the authority to make the decision.

8. What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;

Our BerryDunn team is familiar with how data should flow in an ERP system, including the workflows associated with these transactions. We strive for inter-departmental cooperation from the beginning of our projects. This includes involving project participants from various departments during the fact-finding sessions by functional area. This approach continues through various milestones throughout the project, including implementation. We typically participate in the implementation sessions related to workflow.

9. What methods could your firm provide for the capturing and production of consistent, expandable set of data;

We would provide for the capturing and production of consistent, expandable set of data as part of our functional and technical requirements in the RFP development process.

10. 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

Our team members only work with the public sector and are familiar with government accounting. BerryDunn has numerous resources with prior local government accounting experience and public-sector implementation project experience to help guide the project. We will work with the client to learn more about chart of accounts needs during current environment analysis phase and embed those needs in RFP development as appropriate. Should chart of accounts (COA) revision be necessary, we can support that effort during the implementation phase.

11. How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.

In our experience, it is best to account for user needs and compliance requirements from the beginning of a project. Accessibility requirements—making websites, mobile apps, and electronic documents accessible to people of varying abilities—are managed like any other requirement and the needs of users who utilize assistive technology are managed like those of any user. We would include compliance with Section 508 of the Americans with Disabilities Act as part of our functional and technical requirements development in our RFP process. It is not unusual for projects to leave compliance to the end. We will help ensure that accessibility is integrated into the development life cycle during requirements development and not as an afterthought or bolted on at the back end.

12. How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?

There are a number of information-gathering activities we complete to understand the core functions and day-to-day processes of these functional areas. We first start by requesting and reviewing existing documentation. This is followed with the completion of an online survey. A majority of the information-gathering activities is completed through our fact-finding sessions by functional area. All of this information is documented in our Current Environment Analysis Report. We also capture the required core functions and day-to-day processes during our JRP sessions. These form the functional and technical requirements included in the RFP. We have conducted these session on-site, remote, or a hybrid approach.

13. How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?

We would welcome the opportunity to discuss process efficiencies; however, there are a number of factors not yet known. It is common to identify existing processes that can be optimized as a result of our fact-finding activities. This includes facilitating business process mapping and optimization sessions. Through this process, we document current processes along with the challenges and areas for improvement. During the initial stages of the implementation, ERP vendors will also facilitate business process sessions to identify alignment of business processes to the system's functionality. These processes are also tested at various points during the implementation.

14.. How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?

Serving as truly independent advisors to our clients, our philosophy is to approach all projects with an open mind to ascertain the needs of our clients. Our approach combines independence, collaboration, and expertise to deliver clear, actionable pathways for the desired future ERP state. We assess the needs of our clients to identify the potential functional areas to include in an RFP. Through this process, we discuss the functional areas that are typical of an ERP system as well as a cloud-based or on-premises system. We also guide our clients through the decision-making process to confirm the full scope of the RFP. During our current environment analysis, we will review, evaluate, and document existing functionality and understand processes that are critical or unique to the client. We will develop a current state analysis including business practices and areas in which needs are not being met by the current ERP solution, areas for improvement provided by a new on-premises or cloud-based system, and recommended key decision points such as transitioning to or from cloud-based systems to an on-premises based system and vice versa. Our objective is to thoroughly understand the client's current environment, consider factors that impact the current environment and the client's desire for a sound future environment while seeking alignment with the client's goals and objectives, consider new options while advising on what continued or current investments could provide, and providing clear options to consider in decision-making and developing a roadmap for the client's future state.

HUB Bonus

BerryDunn is not a Historically Underutilized Business (HUB) or Minority, Women-Owned, or Disadvantaged Business Enterprise.

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

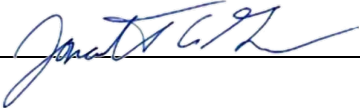
By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.**

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):

Signature of Authorized Representative:

_____

Date:_____

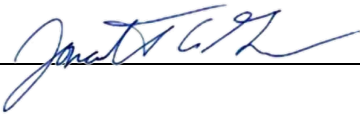
**ATTACHMENT II:
CERTIFICATIONS OF OFFEROR**

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, _____(typed or printed name) certify that I am the _____ (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):

Signature of Authorized Representative:

_____

Date:_____

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).

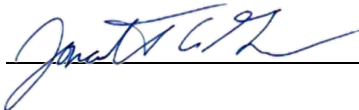
The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

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):

Signature of Authorized Representative:



Date: _____

Attachment IV

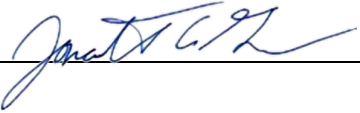
LOBBYING CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS

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):

Signature of Authorized Representative:



Date: _____

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

The _____ (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 _____ (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;

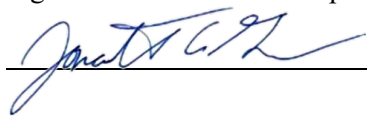
Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal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

Signature of Authorized Representative:

_____

Date: _____

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.

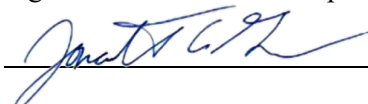
The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

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):

Signature of Authorized Representative:



Date: _____

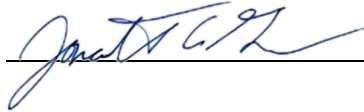
Attachment VII

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):

Signature of Authorized Representative:



Date: _____

Attachment VIII

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:

- 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

☐

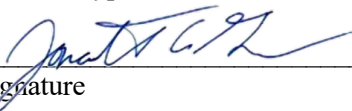
Partnership

☐

Other: Limited Liability Company

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.

(Printed/Typed Name and Title of Authorized Representative)



Signature

Date:

Attachment IX

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

Typed Name

Date

Subscribed and sworn to before me this _____ day of _____ (month), 20__ in

_____ (city), _____ (county), _____ (state).



Notary Public in and for _____ (County),

SEAL

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

State of _____ Commission expires: _____

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

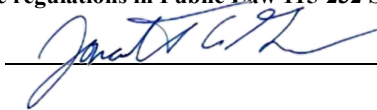
This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications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



NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

-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:

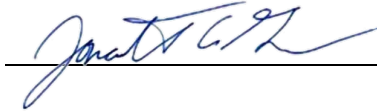
- A) means, with respect to the entity or association, to:
- I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
 - II. refrain from continuing an existing business relationship with 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:**



NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

-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.

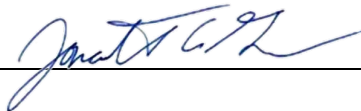
☐ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:



-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:

Exhibit A

Please refer to the **Technical Proposal** section.

EXHIBIT B
Service Questionnaire

Indicate the services you are able to provide:

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

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.

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.

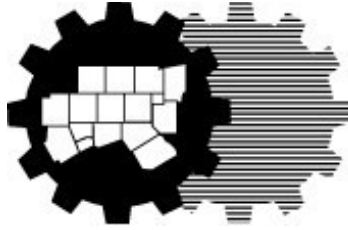
Pricing Format Request Example		Procurement No.:	NCT 2025-017
Respondent Name:			
Notes:	1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2025-017 2. Please provide hourly rates for all staff that would be involved in ERP Consultancy related projects. 3. Use as many lines 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	
	Position Title	Specify Rate (Hourly)	
1			
2			
3			
4			
5			
6			
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:			
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	
	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:			
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
	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. 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.

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.*

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?

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		
Product Category #2		
Product Category #3		
Product Category #4		
Product Category #5		
Product Category #6		

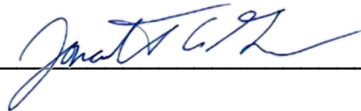
Respondents should address the following items in Tab D: Technical Proposal if they are applicable for the service(s) being proposed.

- 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.

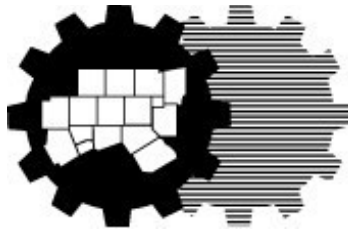
Craig Johnson
Chief Procurement Officer

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

COMPANY NAME: _____

SIGNATURE:  _____

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



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?

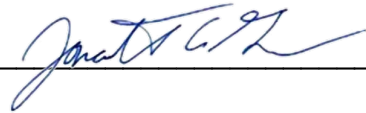
Answers

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: _____

SIGNATURE:  _____

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

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