



## CITY OF MERCER ISLAND ATTACHMENT A – SCOPE OF SERVICES

### ADVISORY SERVICES FOR ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE SELECTION AND IMPLEMENTATION RFP NO. 21-03

#### **Task #1 – Project Management**

Formalize a consultant communication plan; develop a project plan including timelines; facilitate power user committee meetings; track all decisions; and track all issues with proposed actions.

**Deliverable.** Project documents necessary to support a project of this size – including but not limited to project plan including tasks, timelines, communication plan, executive status reports, etc.

#### **Task #2 – Needs Assessment/ Gap Analysis**

In consideration of the City's goals and objectives, review, evaluate, and document existing systems; and determine and document the functional requirements necessary to meet the business needs of City departments. The Consultant, in collaboration with the City's power user committee, will identify deficiencies within the current systems that can be enhanced with a new ERP software solution, and propose opportunities for improved system design and efficiency.

**Deliverable.** Needs Assessment/Gap Analysis report which should include current business practices, current process maps, and areas in which current needs are not being met by the current ERP solution.

#### **Task #3 – Develop a Request for Proposal (RFP)**

Based on the results of the Needs Assessment and Gap Analysis, prepare an RFP to be issued by the City for new ERP software and implementation services.

**Deliverable.** Completed RFP for new ERP software and implementation.

#### **Task #4 – Develop an Action Plan to Implement Solution**

Complete a comprehensive action plan to implement solution, including prioritization of solution requirements and system integration plans, where practicable, with other City

software, suggested time frames for implementing solution modules, establishing necessary City staff resources, allocation of time, and a staff training strategy.

**Deliverable.** Detailed action plan report to implement different modules of the ERP solution over project phases. Action plan will clearly detail City resources needed to implement the solutions, including assessment of staff's current workloads in consideration of the workload demands associated with an ERP implementation, and identification of areas in which outside temporary help could be utilized.

#### **Task #5 – Evaluation and Selection of Vendor**

Lead the City through the RFP selection process, including coordinating software demonstrations and when appropriate, on-site visits. Assist with the identification of potential risks and issues to ensure the City makes a quality selection decision, which achieves the City's ERP requirements.

**Deliverable.** Written analysis of vendor proposals and recommendations of the vendor that best meets the City's objectives.

#### **Task #6 – Contract Negotiations**

Once the software vendor has been recommended, the Consultant will be required to assist City staff in successfully negotiating a contract. Consultant may be required to attend the City Council meeting and assist with the presentation for the selection and award of the chosen vendor.

**Deliverable.** Review of proposals and assistance with negotiation of the contract. If requested, consultant will attend City Council meeting to support City staff.

**Task #7 – Implementation.** Guide the City through the implementation of the selected software and assist with the identification and assessment of process changes necessary for a successful ERP software roll-out, including develop a "train the trainer" staff training; monitor vendor compliance to negotiated contract; provide guidance in conducting user acceptance testing; and authorize system acceptance for project closeout.

**Deliverable.** Consulting and project management services during the selection and implementation phases for potential ERP solution.