



Town of Johnston  
**REQUEST FOR PROPOSALS**  
ERP / Financial Management System

**Bid Number:** BID00000172

**Issuing Department:** Finance Department

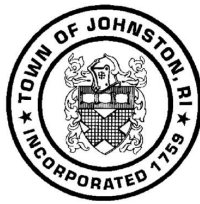
**Bid Due Date & Opening:** March 31<sup>st</sup>, 2023  
**Time:** 10:00 am



**PURCHASING DEPARTMENT**  
TOWN OF JOHNSTON, RHODE ISLAND

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**PURCHASING DEPARTMENT**  
TOWN OF JOHNSTON, RHODE ISLAND

The Town of Johnston is seeking proposals for an ERP / Financial Management System.

## **SUBMISSION OF BIDS INSTRUCTIONS**

Sealed bids will be accepted at the Office of the Town Clerk at Johnston Town Hall. Proposals may be submitted up to 10:00 am on March 31<sup>st</sup>, 2023. All proposals will then be publicly opened and read aloud at the Conference Room located at Town Hall.

A sealed package must be submitted containing one (1) original bid, labeled original and one (1) unbound copy.

The bids must be marked with the name and address of the bidder, and the date and time of bid opening. Bids must be received prior to the due date and time. Bids received after that time shall be returned unopened. Packages submitted must be sealed and clearly marked: “**ERP / Financial Management System.**” Any communications that are not competitive sealed proposals should have “**NOT A BID**” written on the envelope or wrapper.

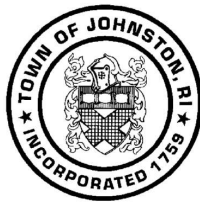
Envelopes containing bids must be sealed and addressed to:

Town Clerk’s Office  
Johnston Town Hall  
1385 Hartford Avenue  
Johnston, RI 02919

The Town is not responsible for accepting any submissions delivered to other town buildings. Bids received prior to the time of opening will be securely kept, unopened until the opening time. No responsibility will attach to an officer or person for the premature opening of a bid not properly addressed and identified.

### **Documents Required for Submission with Sealed Bid**

1. A sealed package must be submitted containing one (1) original bid, labeled original and one (1) unbound copy.
2. Bid Bond or Certified Bank Check: Must be for 10% of the price of the Bid.
3. Bid Form found on page 8 of this RFP. Must be signed by a responsible member of the firm with their signature and official title.



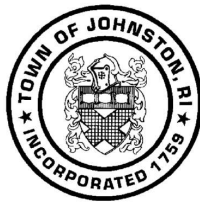
**PURCHASING DEPARTMENT**  
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**Documents Required if Selected as Winning Bidder**

1. Performance Bond or Certified Bank Check: Must be for 100% of completed cost of project/service.
2. Insurance Binder: A certificate of insurance indicating liability and workers' compensation coverage must be provided.
3. IRS Form W-9: Should be completed and submitted if the bidder falls under IRS requirements to file this form.

**NOTICES TO PROPOSERS**

- I. Any bidder may withdraw the firm's bid by written request at any time prior to the advertised time for opening. Telephonic, email or facsimile transmitted bids, amendments, or withdrawals will not be accepted.
- II. Unless otherwise specified, no bid may be withdrawn after the date and time of the bid opening. Time is of the essence in this bid and failure to deliver within the time period shall be considered default.
- III. If any proprietary, trade, brand or manufacturer's name or part number is used herein in describing the required equipment, it shall be understood to indicate the minimum standard of composition and quality desired and shall not be construed to exclude equipment that equals or exceeds the functional capability and quality of the named equipment. If bids are based on such equivalent equipment, indicate the manufacturer's name, model and number for the equipment and include any literature or other explanation of the equipment's quality or performance.
- IV. Negligence on the part of the bidder in preparing the bid confers no rights for the withdrawal of the bid after said bid has been opened.
- V. Descriptive materials such as plans, drawings, photographs, written descriptions, and particularly manufacturer's literature that will enable the Town to determine the exact quality, design and appearance of the equipment proposed, shall accompany the bid. All equipment listed, or shown, in the manufacturer's literature, drawings or photographs, and approved by the Town, shall be furnished.
- VI. All prices bid must be on the basis of F.O.B. Delivery Point, Town of Johnston. Therefore, shipping costs are to be included within the process quoted. Deliveries must consist only of new merchandise or equipment and shall be made between 7:30am and 3:00pm, or as may be arranged during emergencies.
- VII. Bids received prior to the time of opening will be securely kept, unopened. No responsibility will attach to an officer or person for the premature opening of a bid not properly addressed and identified.



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VIII. The Finance Director or his designee may waive any or all bids for cause, failure to meet specifications or any reason deemed appropriate. The Town of Johnston reserves the right to reject any or all responses or parts thereof, to waive any informality in them, or accept any bid deemed in the best interest of the Town.

IX. An award will be given in writing to the bidder whose offer provides the greatest value to the Town, from the standpoint of meeting specifications and requirements of bidding documents, suitability to purpose, quality, service, previous experience, price, ability to deliver, or for any other reason deemed by the Town to be in its own best interest. Any final analysis or weighted point score does not imply that one bidder is superior to another, but simply, in the Town's judgment the bidder selected appears to offer the best overall solution for our current and anticipated needs. Thus, the result will not be determined by price alone.

Award will be based on, but not limited necessarily to the following (where applicable):

- a) Adherence to all conditions and requirements of the bid specifications.
- b) Total bid price: (including any discounts), unit bid price, or extended price.
- c) General reputation and experience of bidders.
- d) Evaluation of the bidder's ability to service the Town.
- e) Financial responsibility of the bidder.
- f) Prior knowledge of and experience with the bidder in terms of past performance.
- g) Needs and requirements of the Town.
- h) Experience with the products involved.
- i) Bidder's ability to meet delivery and stocking requirements.
- j) Delivery date or service date; and
- k) Ordering method.

X. After the bid is awarded, all documents pertaining to the successful bid will be available for public inspection in the Town purchasing office.

XI. If all Bids exceed the available funds, the Finance Director may re-solicit new Bids or enter into competitive negotiations with two or more of the lowest bidders meeting all requirements as outlined.

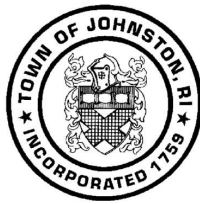
XII. A reasonable inquiry to determine the responsibility of the bidder or offer may be conducted. Failure to promptly supply information related to such an inquiry may be grounds for disqualification of a bidder. All information supplied is confidential.

XIII. The Town may make such investigations as it deems necessary to determine the ability of the bidder to provide the materials or services, and the bidder shall furnish to the Town all such information and data for this purpose as the Town may request. The Town reserves the right to reject any bid if such bidder fails to satisfy the Town that such bidder is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.



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- XIV. Bid price shall be firm; unit price shall include any and all trade discounts. Price shall be inclusive of any freight, handling, delivery surcharges or any other incidental charges. Your bid shall be exclusive of any Federal or State taxes, as the Town of Johnston is exempt from payment of such taxes. A certificate of exemption shall be forwarded to the elected vendor upon request.
- XV. Delivery shall be made to the Town of Johnston on the "ship to" address of the Purchase Order. Delivery is required within the time stated herein from the date of the issuance of the purchase order, unless otherwise noted. Delivery shall include assembly, servicing and placement of equipment in operable status unless specified otherwise. No deliveries shall become due or acceptable without a written Purchase Order issued by the Town of Johnston.
- XVI. The Department Director, or his designee, shall accomplish inspection and acceptance of materials/equipment purchased for the department.
- XVII. In case of default, the Town may procure the materials from other sources and hold the bidder responsible for any excess costs occasioned thereby and may immediately cancel the Purchase Order.
- XVIII. Bidders are advised that this section of the specifications will be evaluated before the technical specifications. Bids that do not comply with our General Conditions, Bonding, Insurance, Delivery, Bidder Qualifications, Service and Warranty requirements will be immediately deemed non-responsive and shall be immediately rejected without further review of the technical specification.
- XIX. Bids not received by the Bid Submittal Deadline are late. Late Bids will be returned to Bidders unopened.
- XX. No employee, officer or agent of the Town of Johnston shall participate in the selection, the award or administration, of the contract if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when one of the following has a financial or other interest in any firm proposing on or selected for the award:
- a) The employee or an officer or agent of the employee.
  - b) Any member of the employee's immediate family.
  - c) The employee's business partner; or
  - d) An organization that employs, or is about to employ, any of the above.
- XXI. This is a "prevailing wage" contract. Prevailing Wage refers to the requirements of the Rhode Island General Law 37-13 and the general prevailing rate of pay for regular, holiday and overtime wages to be paid to each craftsman, mechanic, teamster, laborer or other type of worker performing work on public works projects when state or municipal funds are used in excess of \$1,000. Contractors must refer to the applicable Davis Bacon Wage Determination rate schedule available at the Rhode Island Department of Labor and Training website to determine the prevailing wage rates for a public works construction project.



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## **INQUIRIES**

Any questions concerning clarification on any portion of this RFP should be made to:

**By Mail:**

Tyler P. Carney  
Johnston Town Hall  
1385 Hartford Avenue  
Johnston RI, 02919

**By Email:**

Tyler P. Carney  
[tcarney@johnston-ri.us](mailto:tcarney@johnston-ri.us)

All bidders are responsible for ensuring that no addenda have been made to the original proposal package. All proposal packages and addenda shall be posted to the Town's website and are also available by contacting Tyler Carney, at [tcarney@johnston-ri.us](mailto:tcarney@johnston-ri.us)



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**BID FORM**

Name of Bidder (Firm or Individual): \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact Email: \_\_\_\_\_

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

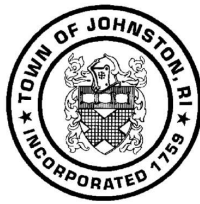
Total Amount:  (See Attached – Page 17)

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

\_\_\_\_\_  
Title of Representative

\_\_\_\_\_  
Date





**PURCHASING DEPARTMENT**  
TOWN OF JOHNSTON, RHODE ISLAND

**SPECIFICATIONS**  
ERP/FINANCIAL MANAGEMENT SYSTEM

**PROCUREMENT SCHEDULE**

<b>Procurement Activity</b>	<b>Expected Date / Time</b>	<b>Comments</b>
Town Issues RFP	Monday, March 6 <sup>th</sup> , 2023	Bid Specs are available at <a href="https://townofjohnstonri.com/request-for-proposals">https://townofjohnstonri.com/request-for-proposals</a>
Written Questions Due	Monday, March 13 <sup>th</sup> , 2023	All questions should be emailed to Tyler Carney, <a href="mailto:tcarney@johnston-ri.us">tcarney@johnston-ri.us</a>
Responses to Questions	Friday, March 17 <sup>th</sup> , 2023	All responses will be posted to the Town's website & available at the Town Clerk's Office
Bids Submissions Due	10:00 am Friday, March 31 <sup>st</sup> , 2023	A seal package containing the original bid and one (1) copy, labeled "ERP/Financial Management System" and addressed/delivered to:  Town Clerk's Office Johnston Town Hall 1385 Hartford Avenue Johnston, RI 02919
Bid Opening	10:00 am Friday, March 31 <sup>st</sup> , 2023	A bid tabulation will be published to the Town's website
Evaluation Period	April 3 <sup>rd</sup> - April 7 <sup>th</sup> 2023	
Intent to Award; Submitted to Town Council	Monday, April 10 <sup>th</sup> , 2023	

\*The town reserves the right, at its discretion, to adjust this procurement schedule as it deems necessary.

Questions related to the interpretation of this RFP must be submitted in writing (via email) to Tyler Carney, [tcarney@johnston-ri.us](mailto:tcarney@johnston-ri.us) by March 13<sup>th</sup>, 2023. Verbal questions related to the interpretation of this RFP will not be accepted.



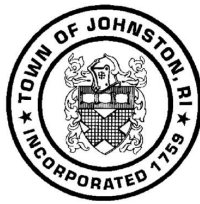
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**BACKGROUND**

<b>Metric</b>	<b>Current</b>
Population	29,322 (2018)
Budget (All Funds) - Town	\$99,045,734
Number of Funds - Town	Approx. 54
Number of ERP System Users	Finance Users: 15 - 20 Requisition Entry/Approvers: 20 - 25
Fiscal Year	July 1 <sup>st</sup> – June 30 <sup>th</sup>

**CURRENT APPLICATIONS**

<b>Program/Application</b>	<b>Vendor</b>	<b>Action</b>	<b>Additional Comments</b>
General Ledger	SunGard	Replace	
Purchasing	SunGard	Replace	
Accounts Payable/ Receivable	SunGard	Replace	
Fixed Assets	SunGard	Replace	
Budgeting	Excel	Intergrade or Replace	
Tax Billing	Vision / Govolution	Intergrade	
Utility Billing	Vision / Govolution	Intergrade	
Payroll/HR/Time Tracking	ADP & Kronos	Integrate	Intends to keep this application



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## **SCOPE OF WORK**

The Town of Johnston (Town) is issuing this Request for Proposal (RFP) for the purchase and implementation of a modern, integrated Enterprise Resource Planning System (ERP) system.

The Town intends to purchase or lease a system consisting of the following specific applications listed under “A”, and depending on cost, applications listed under “B”.

**A**  
General Ledger  
Requisitions / Purchase Orders  
Accounts Payable / Receivable  
Fixed Assets

**B**  
Budgeting

The immediate objective for the Town is to replace all applications listed under “A,” replacing SunGard as soon as possible. All applications listed under “B,” as noted previously, depend on the pricing. The vendor must include all relative services to successfully implement all applications, including training, data conversion, and project management.

## **CONTRACT AWARD**

The Town will enter into a contract with a single vendor who will provide the price for a yearly subscription to their solution, along with a one-time deployment cost for configuration. The term of this contract shall be for three (3) years, and the Town shall have the option to extend the contract for an additional two (2) one (1) year periods.

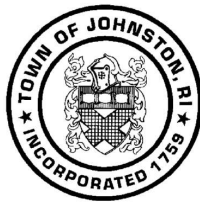
## **COMPONENTS AND REQUIREMENTS**

The Bidder must include, in its proposal, all of the following application software components, including the features listed for each component. The System must include, but is not limited to, all of the following features:

### **CORE MODULES**

#### **1) GLOBAL FEATURES**

- a. Supports multiple user access in all applications.
- b. Is user-friendly, with on-the-fly entry.
- c. Operates in a Windows or equivalent environment.
- d. Is based on a stable and established operating platform.
- e. Can import from and export to spreadsheet and word-processing programs.
- f. Contains “drill-down” capabilities.
- g. Contains adequate security that should include, but not be limited to, multi-level security, password protections, ability to control access rights by component, ability to control access within the functionality of components (example: access GL reports, but not journal entries), and restricts users to read only;



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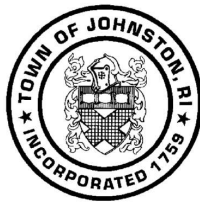
- h. Contains help for users within the system.
- i. Contains 13 or more reporting periods.
- j. Balances before posting transactions.
- k. Provides the ability to retain history for multiple years.
- l. Provides for batch postings.
- m. Allows changes to closed periods by some users.
- n. Provides "print preview" screens prior to printing; and
- o. Allows for complete integration of each component to its "parent" components, such as Accounts Receivable to the General Ledger.

**2) GENERAL LEDGER**

- a. Integrates with all sub-systems for automatic postings.
- b. Enables compliance with GAAP and GAAFR standards.
- c. Handles accrual, modified accrual, or cash basis accounting.
- d. Provides a Chart of Accounts system that provides a flexible account numbering format that meets the requirements of the RI State Municipal Transparency Portal.
- e. Provides an unlimited number of accounts.
- f. Tracks fiscal-year accounting periods with user-defined begin/end dates.
- g. Provides detailed audit trail by transaction date, source, amount, and operator code.
- h. Provides for on-line budget preparation & analysis, and flexible reporting.
- i. Allows for advance set-up of succeeding fiscal year's budget and offers percentage increases/ decreases per account.
- j. Maintains previous fiscal year financial activity and allows for the storage of multiple prior years' comparatives.
- k. Provides automated GIL entries from other FMIS modules.
- l. Provides routines for manual journal entries with date checks and balance verification.
- m. Provides drop-down selection boxes provided listing G/L accounts for easy lookups and entry;
- n. Provides processing codes available for standard, recurring journal entries that speed up the transaction process.
- o. Generates pre-posting audits for accuracy.
- p. Provides set-up for recurring G/L entries in fixed or variable amounts.
- q. Provides automatic on-line error checking that ensures transactions are balanced upon entry.
- r. Allows transaction entry for previous periods within the current fiscal year.
- s. Provides the ability to make automated corrections/reversals of previously posted transactions.
- t. Permits entries and allows reporting for current fiscal year while prior fiscal year is still open.
- u. Maintains detailed ledger listing all account transactions within a user-defined date range.
- v. Provides User-defined journals for special reporting; and,
- w. Includes a mapping facility that allows conversion of information from prior Town financial data sources and cross walks the existing Town chart of account datasets into the RI State Municipal Transparency Portal formats.

**3) FUND ACCOUNTING FEATURES**

- a. Performs inter-fund entries (due to/due from).
- b. Maintains and accounts for funds separately.
- c. Provides auto balancing of funds.
- d. Provides encumbrance accounting abilities (funds committed for future use).
- e. Provides inter-period reporting (reports across different periods).



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- f. Provides for cash/checking account reconciliation; and

**4) ACCOUNTS PAYABLE**

- a. Provide ability to expense funds for the invoice amount, recognize a payable in the corresponding fund and automatically liquidate the corresponding encumbrance amount.
- b. Provide ability to set-up recurring monthly payments.
- c. Support user-defined tolerances in the invoice reconciliation process including invoice quantity different than purchase order.
- d. Provide ability to view a summary vendor aging on-line and drill down selectively by vendor to see detail items; and,
- e. Print cash requirements report for the next 90 days including open payables and purchase orders issued.

**5) ACCOUNTS RECEIVABLE**

- a. Remittance processing -- including payment methods and automated processing.
- b. Credit management -- including communication of credit policies, credit checks and approvals, and credit maintenance; and,
- c. Collections -- including methods to monitor and motivate internal and external collections agents, collections techniques, and technology.

**6) FIXED ASSETS**

- a. Provides complete control of cash flows, budgets; and,
- b. Depreciates from start to finish, capturing every aspect of expenditure relating to each stage of the depreciation cycle and maintaining any number of budgets.

**7) REPORTING FEATURES**

- a. Provides for 13 or more periods.
- b. Provides standardized reports for each component.
- c. Provides "print preview" screens prior to printing of all reports.
- d. Provides ad-hoc on-the-fly reporting using the power and flexibility of the Chart of Accounts.
- e. Provides a report writing tool to create and save customized reports (either built-in component or can integrate an add-on component).
- f. Provides a report writing tool which has export capabilities for spreadsheets, disk or printer.
- g. Provides the ability to meet all federal, state and local reporting requirements; and
- h. Provides periodic updates and revised forms/reports for state and federal report requirements.



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**ADDITIONAL MODULES**

The Town may add additional components in the future, as mentioned, dependent on price. These components include, but are not limited to:

**1) BUDGETING**

General

- a. Integration with accounting software and general ledger.
- b. Software will create budget publication to assist with implementation of GFOA certification.
- c. Graphics module for preparation of graphs, tables, charts, etc.
- d. Provide financial statement reporting module to provide information to help facilitate decision making.
- e. Include a planning and forecasting module to develop annual budgets.
- f. Dedicated customer service available during normal business hours M-F 8:00am–4:30pm.
- g. Web-based interface
- h. Dedicated implementation team.
- i. Designated software representative to moderate software support after implementation.
- j. Updates to be approved by the Town before installation

Operating Budget

- a. Ability for users to submit and approve budgets at department level and provide workflow.
- b. All departments should be able to update and retrieve information.
- c. Ability to record budget notes at the line-item level.
- d. Tracking of changes.
- e. Collaborative, multi-user budget process.
- f. Ability to attach budget support documents to departmental budget worksheets; and
- g. Supports budget adjustments.

Position Budgeting and Forecasting

- a. Import salary/benefit data from accounting software or Excel Spreadsheet.
- b. Salary forecasting based on projected increases.
- c. Allocate expenses for positions split between multiple departments.
- d. Rule-based benefits calculations.
- e. Multi-year forecasting.
- f. Unlimited budget versioning.
- g. Partial-year position budgeting; and
- h. Ability to generate cash flow statements and income statements.



**PURCHASING DEPARTMENT**  
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**EVALUATION CRITERIA**

<b>Evaluation Factor</b>	<b>Total Points</b>
Implementation Approach	25
Technical Evaluation	40
Cost Evaluation	35
<b>Total</b>	<b>100</b>

**Implementation Approach (25 Total Points)**

The implementation approach will be evaluated as an independent factor. The Vendor is to provide an implementation plan in narrative format supported by an estimated project plan / schedule for implementation of the proposed solution.

<b>Evaluation Factor</b>	<b>Total Points</b>
Quality of Implementation Plan	15
User Training	5
Demonstrated understanding of the Town's requirements	5
<b>Total</b>	<b>25</b>



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**Technical Evaluation Criteria (40 Total Points)**

Proposals will be graded on the following criteria. All bidders will be evaluated on the same basis. Bidders must meet the mandatory criteria to have their proposals evaluated and scored.

<b>Evaluation Factor</b>	<b>Total Points</b>
Company Background/Experience	5
Customer Service/Technical Support	5
Reporting Capabilities	5
Overall General System Features	25
<b>Total</b>	<b>40</b>

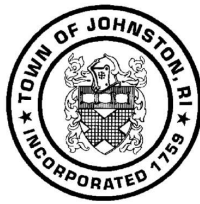
**Cost Evaluation Criteria (35 Total Points)**

The implementation approach will be evaluated as an independent factor. The cost proposal will first be evaluated to determine whether it is feasible.

*Cost Calculation:*

$(\text{Lowest cost proposal submitted} / \text{Cost of Proposal in Question}) \times 35 = \text{Total awarded points out of 35.}$





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**ADDEDEUM 1  
COST PROPOSAL WORKSHEET**

Proposal From: \_\_\_\_\_  
(Name of Firm)

Total Bid Amount: \_\_\_\_\_  
(Numeric and written dollar amount)

The total bid amount (above) should include the total cost of conversion, training, customer service/support, and total 5 year annual maintenance cost, for all core modules/features (page 11). Exclude added alternatives from the total bid amount.

<b>Functionality</b>	<b>Core Modules</b>	<b>Add Alternative</b>	<b>Total Cost</b>
<b>Implementation Cost</b>			
<b>Year 1</b>			
<b>Year 2</b>			
<b>Year 3</b>			
<b>Year 4</b>			
<b>Year 5</b>			
<b>Grand Total</b>			

\*Please attached additional details and/or cost breakdown to support bid amount.



**PURCHASING DEPARTMENT**  
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**ADDEDEUM 2**  
**VENDOR PROFILE**

Your Company Name:

---

Holding Company (if any):

---

Corporate Headquarters Address:

---

Company Local Address:

---

Account Representative:

---

Email Address:

---

Phone Number:

---

Years in Municipal Software Business:

---

Total Number of Employees:

---

Ownership Structure:

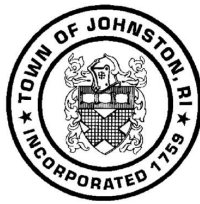
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Name and Size of Largest Customer:

---

Name and Size of Largest Customer Locally:

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**PURCHASING DEPARTMENT**  
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**ADDEDEUM 3**  
**CUSTOMER BASE**

**1. How many RI municipal customers do you have?**

Please attach a complete reference list of all RI municipal customers. This list should include the following for each municipality:

- a. Contact information.
- b. Date of installation
- c. Each application installed.
- d. Indicate whether it is in City/Town, School or Both

This list should be sorted alphabetically by municipality name and should identify those customers who are using the same version of the software that is being proposed.

**2. Either on the list requested above, or here, identify/highlight each new RI customer in the past five (5) years, including date of install.**

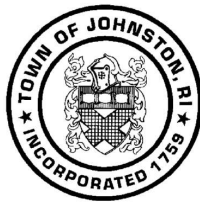
For this item, the City is interested only in those customers who were an addition to the vendor's customer base, as opposed to a customers who upgraded to a new product or version, or customers who were added as result of vendor acquisitions of or by other software companies.

**3. How many municipal customers outside of RI do you have?**

Attach a complete reference list of all municipal customers outside of RI. Include the same information as requested for RI customers.

**4. Either on the list requested above, or here, identify/highlight each new non-RI customer in the past three (3) years, including date of install.**

**5. During the last 3 years, how many Municipal competitive bids have you responded to, and how many of these were awarded to you?**



**PURCHASING DEPARTMENT**  
TOWN OF JOHNSTON, RHODE ISLAND

**ADDEDEUM 4**  
**IMPLEMENTATION PLAN**

The Town's current plan is for a vendor contract to be negotiated by the end of April 2023, with the installation through implementation to begin shortly thereafter. With plans to go live in January 2024. If you feel this is a realistic implementation timeframe, please provide a rough draft of a proposed Implementation Project Plan that will demonstrate your ability to meet this objective, for each application, including provisions for suitable parallel and other testing. Please also include key expectations of the Town that you have in order for these goals to be met. If you do not feel this is realistic implementation timeframe, please propose one that is more realistic in your view, as well as all of the other information required above.

**Please include answers to the following questions in your proposal:**

1. Provide a detailed project plan for the implementation process.
2. Provide a timeline and major milestones.
3. How will you ensure the project stays on schedule?
4. What is your approach to user training?
5. How do you ensure that the training materials are accessible and effective for users with varying levels of technical expertise?
6. How do you ensure that you have a thorough understanding of our organization's requirements before beginning the implementation process?