

REQUEST FOR PROPOSALS FOR A CONSULTANT TO PROVIDE CLIENT PROJECT MANAGEMENT SERVICES TO IMPLEMENT TYLER'S MUNIS FINANCIAL MANAGEMENT SOFTWARE SUITE

PROJECT: JEFFERSON COUNTY, WASHINGTON IS SEEKING PROPOSALS FROM INTERESTED AND QUALIFIED PROPOSERS TO PROVIDE AN EXPERIENCED AND DEDICATED CLIENT PROJECT MANAGER (CPM) TO MANAGE THE IMPLEMENTATION OF TYLER'S FINANCIAL MANAGEMENT SOFTWARE SUITE

ISSUER: JEFFERSON COUNTY, WASHINGTON

PROJECT CONTACT: Mark McCauley, Director, Central Services
Jefferson County
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Port Townsend, WA 98368
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ISSUE DATE: ***June 28, 2019***

RETURN DEADLINE: ***July 19, 2019 by 4:30 p.m.***

INTERVIEWS: ***July 26, 2019, 9:00 a.m. – 1:00 p.m.***

NOTIFICATION: ***July 31, 2019***

CONTRACT AWARD: ***August 12, 2019***

INTRODUCTION

Jefferson County (population approximately 31,000) is located on the Olympic Peninsula, in western Washington State. The county seat is located in Port Townsend in the historic county courthouse. It is largely a rural county with forestry, agriculture, local government, a paper mill and the maritime industry being the principal drivers of its economy. The County is seeking a qualified consultant for project management services to ensure timely and effective implementation of Tyler's Munis financial management software suite. The County just approved a contract with Tyler Technologies for licensing and professional services for Munis implementation. Jefferson County is austere staffed and doesn't have the resources in-house for managing this implementation. Tyler has established an 18-month timeline to successfully implement all phases of the project including, but not limited to, the following functional areas: Finance, Accounting, Payroll, and Human Resources. Specific services to be provided under this Request for Proposal (RFP) are outlined under the section titled Scope of Work. The

contract period will be eighteen months (18) months, unless extended, beginning on or about August 1, 2019 through on or about January 31, 2021. The consultant should have the following experience and qualifications.

EXPERIENCE AND QUALIFICATIONS

1. A minimum of ten (10) years of experience in successful (preferably city and county) project management involving software implementation. Preference will be given to those with experience implementing Tyler's Munis software.
2. Demonstrated competence in sustaining project timelines, schedules, and critical path analysis with all affected parties.
3. Ability to work with key county vendor staff to establish performance targets, track progress, and create concise reporting through various means (i.e. electronic, database, PERT and Gantt type project management tools).
4. Experience and knowledge in project management and leadership, preferably in a local government setting.
5. Effective communications and interpersonal skills, with the ability to clearly report on plan implementation progress, and motivate staff to follow the timelines, report progress, and adapt and adjust as required.
6. Ability to communicate with staff in both teams and individually, and to collaborate to establish the objectives, action steps and critical path timeline for each goal.
7. Ability to commit to this project for at least 18-22 months.
8. Strong ability to keep staff teams focused on goal attainment within conflicting time parameters.
9. Ability to quickly gain a solid understanding of several complex and significant documents including the Tyler Munis Licensing Agreement, including the Statement of Work, as well as other indirectly related and overlapping plans or documents.
10. Ability to work in the dynamic municipal environment, with an understanding of the nuances and challenges within a municipal setting in Washington.

TASKS AND RESPONSIBILITIES

1. Gain a complete understanding of the objectives of the project including the timeline, budget, and outcomes anticipated.
2. Work with senior staff responsible for various stages of the project to accomplish objective(s).
 - a. Identify and obtain needed resources (personnel, equipment, supplies, training, consulting services, etc.) in collaboration with County staff.
3. Maintain continuous communication with Tyler's implementation project manager and staff to ensure project deliverables are met and we remain on time and within budget.
4. Monitor progress on project timeline and address missed targets/benchmarks immediately to avoid significant project delays.
5. Provide and maintain an up-to-date dashboard tool that allows implementation participants to view status of tasks, next steps, responsible person and progress of implementation.
6. Periodically attend senior staff meetings to ask questions, gain knowledge, and provide feedback.

7. Provide oral and written reports to the County Auditor, County Treasurer and Central Services Director, as needed.

WORK

The selected client project manager is expected to develop relationships with County staff and spend most of his/her time on site working directly with key staff members, meeting with senior staff on project status, and working with the system implementer. The County is estimating about 1,400 hours of work over the 18-month term of the project duration.

QUESTIONS

Questions regarding the contents of this RFP must be submitted in writing on or before **Friday, July 12, 2019** and directed to the individual listed under Project Contact on Page 1. All questions will be answered and both the question and answer will be posted on the County's website.

PROPOSAL SUBMISSION DEADLINE

Proposals must be received no later than **4:30 pm, Friday, July 19, 2019**. Postmarks will not be accepted in lieu of actual receipt. Late or incomplete proposals will not be accepted.

SELECTION PROCESS

1. Solicit Requests for Proposals.
2. Review qualifications and identify top two qualified contractors who clearly demonstrate the required knowledge, skills and experience for providing project management services and who demonstrates the ability to work cooperatively and constructively with Elected Officials and County staff.
3. Conduct interviews with finalists, involving the key contract employee assigned to the project.

PROPOSAL FORMAT

Proposals must adhere to the format below and contain all of the information specified.

QUALIFICATIONS

1. Full name and address of contractor.
2. Brief description of the history, mission, and organizational structure of the contractor.
3. Brief statement of the contractor’s approach to satisfying the requirements of the work.
4. Brief statement of the contractor’s experience with projects similar in size and scope and involving governmental entities.
5. Name and qualifications of the professional staff member who will be assigned to the project.
6. A statement of whether or not the contractor is currently involved with any material litigation, arbitration or bankruptcy proceedings, or has been within the past three years directly or indirectly.
7. Certificate of Good Standing – A statement of whether or not the contractor is in good standing with the Washington State Secretary of State’s Office.
8. Provide references of a minimum of three (3) other customers, one (1) of which should be a government agency, involving the Proposer’s delivery of services that demonstrate the ability of the Proposer to provide Client Project Manager services as outlined in this RFP. All references must have names, titles, phone numbers, and email addresses. Experience implementing Tyler’s Munis software is preferred but not required.

PROPOSAL OF SERVICES

1. Statement of Qualifications: Provide a narrative description of the qualifications and experience the contractor has and an outline or framework on how the contractor proposes to manage this project.
2. Budget: Indicate contractor’s hourly rates and charges, including rates for subcontractors, travel, etc.
3. Statement of Availability: Indicate how much time the contractor will be able to dedicate to this project both onsite and offsite.
4. Concept Statement: Reflect in writing the contractor’s concept of the project and how the contractor will approach the project.

PLEASE SUBMIT SIX (6) HARD COPIES AND ONE (1) ELECTRONIC COPY TO:

**Mark McCauley
Central Services Director
Jefferson County
P.O. Box 1220
1820 Jefferson Street
Port Townsend, WA 98368
mmccauley@co.jefferson.wa.us**

EVALUATION CRITERIA

1. Understanding of and experience with managing complex, long-range projects (preferably in a local government setting).
2. Understanding of and experience with implementation of an operational software system.
3. Consistency of proposal with the goals, objectives, tasks, and timeline.
4. Prior record and experience.
5. Cost.
6. General capability/resources available to complete project.
7. Unique qualities of the contractor; advantages over other candidates.

Jefferson County reserves the right to reject any and all proposals based upon evaluation of the above considerations.

Jefferson County is furnishing this Request for Proposals (RFP) for the respondent's convenience, and it is the responsibility of the respondent to assure that information contained is accurate and complete. Jefferson County shall have no obligation or liability with respect to this RFP; any action taken in response to this RFP or any action taken in making or canceling an award shall be without any liability or obligation on the part of Jefferson County. In addition, Jefferson County reserves the right to request additional information. To the extent permitted by law, all materials shall be kept confidential. We will not return any materials received in response to this invitation.

SCOPE OF WORK

BACKGROUND

Jefferson County is seeking an experienced part-time, on-site, dedicated **Client Project Manager (CPM)**, with expertise in enterprise system implementation, to manage the implementation of a new County-wide enterprise resource planning (ERP) system known as Munis, from Tyler Technologies and serve as the advisor and liaison to the Steering Committee, county departments and elected offices, and information technology staff involved with this project. The professional services of the **Enterprise Resource Planning (ERP) Client Project Manager** to be provided are organized into three phases with the CPM responsible for the following services throughout the three phases:

1. Providing the Steering Committee with an independent view on the status and progress of the project.
2. Directing both the implementation vendor and County implementation team to take action to ensure the contract objectives are met and the project completes on time and within budget
3. Validating the implementation vendor's project management plan as well as any additional component parts or plans developed by the vendor and/or County implementation team and recommending changes to the Steering Committee.
4. Managing execution of the project plan by both the implementation vendor and the County; identifying risks and issues with the implementation project and presenting these and recommended actions to the Steering Committee.
5. Reporting project status, project schedule progress and completion of project milestones, independent of the implementation vendor to the Steering Committee. Provide and maintain an up-to-date dashboard tool that allows implementation participants to view status of tasks, next steps, responsible person and progress of implementation.
6. Assuring project budget and expenditures are properly accounted for and reported.
7. Assuring proper communications to make certain queries and recommendations are addressed in a timely manner.
8. Managing all aspects of the finalized Scope of Work between the chosen implementation firm and the County including but not limited to the scope of work, installation plan, business blueprint, configuration plan, issues log, change control plan, deliverable expectation documents, test plan and system acceptance plan.
9. Recommending timely, specific and detailed corrective action plans where needed.
10. Managing ongoing corrective action status reports.
11. Developing a "lessons learned" report on project completion noting the aspects of project implementation that worked well and those that did not, with recommendations for changes in County practice.
12. Enhancing acquired modules, as warranted and approved.
13. Implementing additional modules, as warranted and approved.

PHASE I – ON-GOING PROJECT IMPLEMENTATION MANAGEMENT SERVICES

This phase requires a lead management role providing best efforts to assure a successful implementation of Munis. providing subject matter expertise for the duration of the project and reporting critical issues as requested by the Steering Committee while supporting key project milestones and deliverables, with particular emphasis in the areas of scope, schedule and cost

Key Activities for Phase I:

1. Manage the project plan and schedule, manage both internal and external resources, validate project status, assess whether implementation team assignments are being completed in a timely fashion and identify potential risks.
2. Monitor project budget and business case to validate impacting cost and resource constraints.
3. Manage project scope and ensure change orders are kept to a minimum.
4. Assist in development of governance and change management process, providing recommendations and evaluating effectiveness.
5. Create issue and risk logs to ensure risks have been appropriately identified and that mitigation measures are feasible and appropriate.
6. Conduct interviews with Steering Committee, implementation team and stakeholders to validate that concerns, issues and risks are being appropriately identified and managed.
7. Periodically evaluate project risks and generate recommended list of mitigation options for corrective action.
8. Review quality of deliverables completed as identified in the project work plan.
9. Develop and deliver monthly reports of key findings.
10. Present milestone reports to the Steering Committee.
11. Attend Steering Committee, Senior Staff Meetings, and/or County Commissioner meetings, as needed.

PHASE II – PRE GO-LIVE READINESS

This phase requires an in-depth readiness assessment performed prior to completion of the project Go-Live milestones to identify potential risks and evaluate the County’s level of preparation for a successful go-live. This phase will provide an assurance check to validate readiness for completion of system Go-Live.

Key Activities for Phase II:

1. Integrated Testing and Training Readiness Check
 - a) Review system test strategy and plan.
 - b) Review data conversation strategy and plan.
 - c) Plan training strategy.
 - d) Review organizational change management plan.
 - e) Review data conversation progress and test results.
 - f) Review system performance tests.
 - g) Review development and configuration progress.
 - h) Review system readiness plans.
 - i) Review workforce transition and organizational readiness plan.

j) Review plan for conducting integrated testing and training

2. Go-Live Readiness

- a) Review organizational readiness.
- b) Evaluate training status.
- c) Review cutover plan.
- d) Review system integration readiness.
- e) Review data conversion.
- f) Review post implementation plan.
- g) Validate operability of critical functions.
- h) Validate plan and progress for system security and access.

PHASE III – POST-IMPLEMENTATION EVALUATION

This phase requires oversight of systems Go-Live and cutover, aggressive post-implementation system monitoring, compiling and trouble-shooting the “punch list” of necessary fixes, identifying additional training needs and producing a management review of the implementation project.