



Request for Proposals # 274-IT2026-04

Title: ERP Modernization- System Integrator

Issue Date: September 11, 2026

Due Date: October 2, 2026, no later than 3:00PM EST

LATE PROPOSALS WILL NOT BE ACCEPTED

Issuing Department: *Information Technology*

Direct all inquiries concerning this RFP to:

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Technology Supervisor

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Table of Contents

1	INTRODUCTION.....	3
1.1	PURPOSE.....	3
1.2	ABOUT CITY OF RALEIGH.....	3
1.3	CURRENT BUSINESS AND OPERATIONAL ENVIRONMENT.....	4
1.4	DESIRED OUTCOMES OF THIS PROJECT	8
1.5	VOLUMES AND QUANTITIES	14
1.6	REQUEST FOR PROPOSAL (RFP) TIMELINE.....	15
1.7	PRE-PROPOSAL VIRTUAL MEETING	16
1.8	PROPOSAL QUESTIONS	16
1.9	PROPOSAL SUBMISSION REQUIREMENTS AND CONTACT INFORMATION.....	17
1.9.1	<i>Electronic Bid/Proposal Submission – Instructions</i>	<i>17</i>
1.10	BUSINESS ENGAGEMENT & OPPORTUNITIES	18
1.11	RIGHTS TO SUBMITTED MATERIAL.....	18
1.12	COMMUNICATIONS	18
1.13	LOBBYING.....	18
1.14	CONFLICTS OF INTEREST	18
1.15	PROPOSER EXPENSES.....	19
1.16	PROPOSER ACCEPTANCE	20
2	PROPOSALS.....	20
2.1	REQUEST FOR PROPOSALS REQUIRED DOCUMENT FORMAT	20
2.1.1	<i>Section/Tab 1: Cover Letter</i>	<i>20</i>
2.1.2	<i>Section/Tab 2: Company Qualifications and Experience.....</i>	<i>20</i>
2.1.3	<i>Section/Tab 3: Team Vendor, Experience and Certifications</i>	<i>23</i>
2.1.4	<i>Section/Tab 4: Proposed SI Services</i>	<i>23</i>
2.1.5	<i>Section/Tab 5: Contract Alignment and Due Diligence</i>	<i>24</i>
2.1.6	<i>Section/Tab 6: Cost.....</i>	<i>24</i>
2.2	RFP DOCUMENTS.....	24
3	PROPOSAL EVALUATION.....	25
3.1	PROPOSAL EVALUATION CRITERIA (STAGE 1).....	25
3.2	INTERVIEW/PRESENTATION (STAGE 2).....	28
3.3	FINAL SELECTION.....	28
3.4	NOTICE TO PROPOSERS REGARDING RFP TERMS AND CONDITIONS	29
3.5	CONTRACT TERM	29
3.6	VENDOR RISK ASSESSMENT REQUIREMENT.....	29
4	SCOPE OF SERVICES	30
	APPENDIX I PROPOSAL OF COST.....	35
	APPENDIX II PROPOSAL QUESTIONNAIRE.....	37
	APPENDIX III REFERENCE QUESTIONNAIRE (INSTRUCTION).....	38
	APPENDIX III REFERENCE QUESTIONNAIRE (FORM).....	39
	APPENDIX IV SAMPLE CONTRACT.....	41
	APPENDIX V PRESENTATIONS.....	50

1 INTRODUCTION

1.1 Purpose

The City of Raleigh (CoR) has solicited competitive bids for an Enterprise Resource Planning (ERP) software solution and is working with Workday, Inc. on contract negotiations. Now, CoR is seeking responses to this Request for Proposal (RFP) for professional services to configure and implement the selected ERP software suite.

The CoR is seeking to partner with one or more professional service vendors to configure the selected ERP software suite(s) to meet the city's technical and business requirements. This includes functionalities in Finance, Budget and Planning, and Human Capital Management (HCM) areas, along with their related sub-functions. Detailed information regarding the project scope, timeline, critical due dates, and other essential aspects are provided in this Request for Proposal (RFP).

A detailed scope of services is provided in Section 4 of this document.

All information related to this solicitation, including any addenda, will be posted to the North Carolina electronic Vendor Portal (eVP) at <https://evp.nc.gov/>.

All questions and any correspondence regarding this RFP shall be directed to the City's Point of Contact by email. Only inquiries in writing will be accepted by the City. There shall be no communication with the City regarding this RFP unless otherwise directed by the City's Point of Contact identified below. ****NO PHONE CALLS****:

Contact Name	Email Address
<i>Parijat Malla</i>	<i>Parijat.Malla@raleighnc.gov</i>

1.2 About City of Raleigh

The CoR, the Capital City of North Carolina, remains one of the fastest growing areas in the country. A great economy, top educational institutions, and exceptional health care facilities are some of the characteristics that attract people to the triangle area. The mild climate, diverse work force and proximity to Research Triangle Park combine to make Raleigh a great place to live.

Raleigh is a 21st Century City of Innovation focusing on environmental, cultural, and economic sustainability. The City conserves and protects our environmental resources through best practice and cutting-edge conservation and stewardship, land use, infrastructure and building technologies. The City welcomes growth and diversity through policies and programs that will protect and enhance Raleigh's existing neighborhoods, natural amenities, history, and cultural and human resources for future generations. The City leads to improve quality of life for neighborhoods and standard of living for all citizens. The City works with universities, colleges, citizens, and local partners to promote new

technology, create new job opportunities, and encourage local businesses and entrepreneurs. The City enlists and prepares 21st Century staff with the skill sets to carry out the duties of the City through transparent civic engagement and by providing the very best customer service to our citizens.

The objective of this solicitation is to establish a contract that enables the CoR to engage with a qualified vendor for the replacement of the current Oracle PeopleSoft ERP system. In addition to Oracle PeopleSoft as its primary ERP platform, the City currently leverages several supporting business applications such as SAP SuccessFactors, Oracle Planning and Budgeting, etc. (see Table 1 Current Integrations List for a detailed list of integrations). This system is essential for supporting all mission-critical business capabilities in Finance, Budgeting and Planning and Human Resource areas. Vendors are required to address all application functionalities and services detailed in this document and associated attachments, ensuring a robust, secure, flexible, sustainable, and user-friendly platform tailored to the needs of city staff, vendors, contractors, client users, and government officials throughout Raleigh. The vendor must implement a modernized ERP solution that enhances the City's mission-critical business operations and must position the City to operate, maintain, and evolve the platform independently over its full lifecycle by establishing the ongoing support structure, transferring knowledge to City staff, and delivering the documentation, test assets, and governance needed for the City to sustain the solution after implementation.

To ensure successful implementation, the CoR requires a System Integrator (SI) to act as the prime contractor. The CoR intends to make vendor selections based on the proposal of a qualified SI with proven experience and capacity to drive successful implementation. The CoR will require the prime contractor to be accountable for any sub-contractor's performance (if needed and leveraged).

1.3 Current Business and Operational Environment

CoR is currently utilizing Oracle's PeopleSoft HCM and Financial Supply Chain Management system as its primary ERP solution. Since the CoR implemented PeopleSoft in 2007, the system has been heavily configured to meet the evolving needs of the workforce and key stakeholders. The ERP system interfaces with multiple systems/applications (i.e., Trimble Cityworks, iNovah, Tyler Technology EP&L, UKG Ready) to enable the end-to-end delivery of business processes. The current platform is on legacy technology, which is approaching end of life (EOL). To mitigate technical debt and technical obsolescence, the CoR is looking to implement a new, modern cloud ERP solution to mitigate these risks, standardize business processes, and further improve business operations.

The CoR ERP Integrations diagram below illustrates the City's current ERP integration landscape. See table below for a complete list of all applications in the environment. The CoR and its technologies are continually evolving, additional applications not listed in the attachment will need to be discovered by the Vendor prior to and during implementation to ensure all integrations are completed before go-live. The current-state landscape reflects the integrations as built for the legacy environment; the Vendor should not assume existing integrations will be reproduced as-is. The Vendor is expected to assess each integration and recommend where it should be modernized or redesigned based on

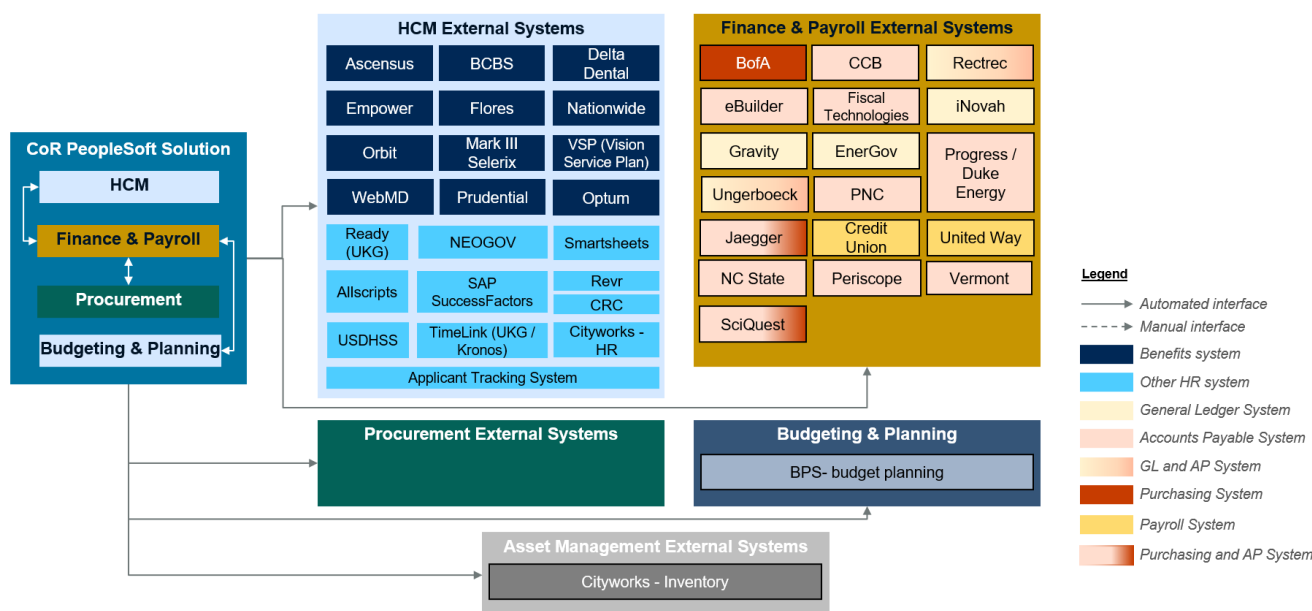
current technology best practices, the target platform's native capabilities, and long-term sustainability and maintainability. The Vendor should highlight the business functions best suited for integration within the solution. CoR prefers that some capabilities be consolidated into the ERP software suite, with others continuing as integrations.

Table 1 Current Integrations List

Application Name	Vendor	Purpose	Integration Required	Type of Integration
CCB (Customer Care and Building)	Oracle	General Ledger and Accounts Payable	Required	Bilateral (Input/Output for PeopleSoft Accounts Payable)
Duke Energy	Duke Energy	Electric Bills	Required	Unilateral (Input for PeopleSoft Accounts Payable)
RPOD (eProcurement)	Jaggaer	Invoice Payments	Potential	Unilateral (Input for PeopleSoft Accounts Payable)
VSI	Vermont Systems	Recreation Management Software Refunds	Required	Unilateral (Input for PeopleSoft Accounts Payable)
PNC Bank	PNC	PNC bank ACH[Employee, Corporate]	Required	Unilateral (Output for PeopleSoft Accounts Payable)
NXG Forensics	Fiscal Technologies	Fraud Detection and Prevention	Required	Unilateral (Output for PeopleSoft Accounts Payable)
Periscope Energy Dashboard	Periscope Energy Dashboard	Electric Energy Usage Monitoring	Potential	Unilateral (Output for PeopleSoft Accounts Payable)
Bank of America Procurement Card	Bank of America	Procurement Card Payments	Required	Unilateral (Input for PeopleSoft Purchasing)
Docusign	Docusign	Contract Signatures	Potential	Unilateral (Output for PeopleSoft Purchasing)
Ungerboeck	Momentum Technologies	Event Management Payments	Required	Bilateral (Input/Output for General Ledger)
eCivis	Euna Solutions	Grants Management and Budget and Actuals	Potential	Unilateral (Input for General Ledger)
PBCS (Planning, Budget and Cloud Services)	Oracle	Budget Forecasting and Tracking	Potential	Unilateral (Input for General Ledger)
iNovah	System Innovators	Cashiering and Payments Journals	Required	Unilateral (Input for General Ledger)
Gravity	Gravity Software	Accounting Solution for ACFR (annual comprehensive financial report)	Potential	Unilateral (Output for General Ledger)
Enterprise Permit and Licensing	Tyler Technologies	Permitting Software Journals	Required	Bilateral (Output for PeopleSoft HR & Input for General Ledger)
Cityworks	Trimble	Work Order System for Raleigh Water Construction Crew	Required	Bilateral (Input/Output for PeopleSoft Inventory); Unilateral (Employee data from Cityworks - > ERP)
Ascensus	Ascensus	457 Plans	Required	Bilateral (Input/Output for PeopleSoft HCM Benefits)
MARK III	Market III	All Voluntary Deduction	Required	Bilateral (Input/Output for PeopleSoft HCM Benefits)
Empower	Empower	401k	Required	Bilateral (Input/Output for PeopleSoft HCM Benefits)
ORBIT	ORBIT	Online Retirement and Benefits Information	Required	Unilateral (Output for PeopleSoft HCM Benefits)
Hinge Health	Hinge Health	Virtual Physical Therapy Sessions	Required	Unilateral (Output for PeopleSoft HCM Benefits)
WebMD	WebMD	Online Health Resource	Required	Unilateral (Output for PeopleSoft HCM Benefits)
Nationwide	Nationwide	Pet Insurance	Required	Unilateral (Output for PeopleSoft HCM Payroll)
Teladoc Health	Teladoc Health	Virtual Healthcare	Required	Unilateral (Output for PeopleSoft HCM Benefits)
FLORES	FLORES	FSA and COBRA	Required	Unilateral (Output for PeopleSoft HCM Benefits)
Government Jobs, Insight and Onboard	NEOGOV	New Hire/Talent Management	Potential	Bilateral (Input/Output for PeopleSoft HCM HR)
BCBS NC (Blue Cross Blue Shield)	BCBS	Medical Plan	Required	Unilateral (Output for PeopleSoft HCM HR)
CorVel	CorVel	Workers Compensation	Required	Unilateral (Output for PeopleSoft HCM HR)
Delta Dental	Delta Dental	Delta Plan	Required	Unilateral (Output for PeopleSoft HCM HR)
ServiceNow	ServiceNow	Internal System	Required	Unilateral (Output for PeopleSoft HCM HR)

Market Pay	Market Pay	Salary Information	Required	Unilateral (Output for PeopleSoft HCM HR)
PNC Check Reconciliation	PNC	Payroll Reconciliation Process for PNC Banks	Required	Unilateral (Input for PeopleSoft HCM Payroll)
UKG	UKG	Time Punches	Potential	Unilateral (Output for PeopleSoft HCM Time and Labor)
SuccessFactors	SAP	Learning and Performance Management System	Potential	Bilateral (Input / Output for PeopleSoft HCM HR Record)
Snowflake	Snowflake	Data Lake	Required	Unilateral (Output for PeopleSoft to Snowflake)
Trimble Unity Construct	Trimble	Construction Project Management Software	Required	Bilateral (Input / Output for PeopleSoft Finance Record)

Figure 1: CoR ERP Integrations



The current ERP modules are maintained by the City's Information Technology (IT) Department.

The following considerations should be taken into account when assessing the requirements and incorporated into your proposal.

- The CoR's current reliance on multiple systems and the need for seamless integration across multiple platforms present opportunities for ongoing modernization and improved efficiency.
- The transition will require effective change management strategies, such as training, to support employees in adopting new digital processes and moving away from previous system or paper-based workflows.
- The City will remain fully operational throughout the implementation and transition period. The vendor's proposed approach, timeline should consider minimizing disruptions to ongoing financial, human resources, payroll and business operations.
- Legacy systems remain critical to operations, and ensuring a smooth transition to modern solutions is essential to mitigate potential risks.

- Legislative requirements will continue to play a key role in shaping system functionality and compliance considerations.

Business process optimization will play a key role in this modernization by identifying and addressing inefficiencies in existing workflows, enhancing resource utilization, and ensuring compliance with regulatory and funding requirements. The following section outlines the key business and technical drivers guiding this modernization initiative.

- **Business Drivers**

- **Improve Service to Stakeholders:** Streamline services and processes to improve functionality and efficiency for citizens, contractors, City staff, and other key stakeholders.
- **Increase Productivity:** Enhance staff productivity by introducing standardized processes, an intuitive design, and common workflows that align with industry and technology best practices.
- **Enhance User Experience:** Improve the organizational work environment by leveraging modern, user-friendly, and easy-to-navigate solutions that enhance accessibility and usability.
- **Increase Automation:** Eliminate manual, time-consuming, or redundant processes to reduce human error and allow CoR staff to focus on critical priorities.
- **Improve Data Quality:** Enhance data integrity through cleansing and use of a single system of record to enable effective execution of the City's core business processes.
- **Empower People:** Foster increased employee engagement and effectiveness by streamlining business processes and enabling self-service capabilities for both employees and managers.

- **Technical Drivers:**

- **Enable Data-Driven Decision Making:** Reduce manual effort in analytics and reporting while increasing access to high-quality, actionable data to support informed decision-making for business and technology strategies.
- **Increase Agility and Operational Efficiency:** Implement a flexible application architecture that allows the system to evolve and adapt quickly to regulatory changes, while minimizing customizations, third-party applications, and system complexity.
- **Reduce Technical Debt:** Reduce operational inefficiencies by consolidating and optimizing applications required to support the City's ERP operations and functions, increasing automation, integration, and self-service capabilities.
- **Optimize Technology:** Ensure seamless integration of tools, technology, and processes through automated workflows, promoting effective collaboration, communication, accountability, and operational control.

1.4 Desired Outcomes of this Project

This section outlines the desired outcomes for this solicitation, including requirements for a new ERP technology solution that will replace the current Oracle PeopleSoft system.

Selected Software Package

The City is entering contract negotiations with Workday Inc. with the intention to award a contract, subject to the successful agreement on contract terms and conditions, contingent upon City Council approval.

In-scope Functional ERP Capabilities

The table below lists the Business Capability Model (BCM), indicating current and target state functional capabilities supporting the ERP technology landscape at the CoR. CoR expects the ERP platform to perform the following technology and service functions.

Table 2: BCM Functional Capabilities

Core Capabilities	
A.2.1.	Manage Finance
A.2.1.1	Perform General Accounting
A.2.1.2	Manage Billing & Accounts Receivable
A.2.1.3	Manage Treasury/Cash
A.2.1.4	Manage Accounts Payable
A.2.1.5	Manage Finance Service Delivery
A.2.1.6	Support Finance Relations & Requests
A.2.1.7	Manage Fixed Assets
A.2.1.8	Manage and Process Payroll & Pension
A.2.1.9	Manage Grants
A.2.1.10	Perform Period Close / Year-end Close
A.2.2.	Manage Procurement
A.2.2.1	Strategically Source
A.2.2.2	Purchase Goods and Services
A.2.2.3	Manage Vendor Relationships
A.2.2.4	Manage Solicitations
A.2.2.5	Manage Supplier Contracts
A.2.2.6	Manage Inventory
A.2.3.	Manage Budgeting & Planning
A.2.3.1	Create Budgets/Develop business cases for new budget requests
A.2.3.2	Consolidate Budgets
A.2.3.3	Manage Financial Performance
A.2.3.4	Create Budgetary Estimates, Plans & Forecasts
A.2.3.5	Revise Budgets
A.2.3.6	Perform Capital Planning
A.2.4.	Manage Human Capital
A.2.4.1	Administer HR

A.2.4.2	Acquire Talent
A.2.4.3	Manage Total Rewards
A.2.4.4	Manage HR Service Delivery
A.2.4.5	Manage Workforce Performance
A.2.4.6	Manage Workforce Compliance & Guidance
A.2.4.7	Manage Workforce / Employee Relations
A.2.4.8	Manage Workforce

Table 3: BCM Technology and Service Capabilities

Core Capabilities	
A.2.5	Technology and Service Delivery Capabilities
A.2.5.1	Access Control & Security
A.2.5.2	Architecture (Scalability, Availability, Performance, etc.)
A.2.5.3	Audit
A.2.5.4	Configurability/Flexibility
A.2.5.5	Data
A.2.5.6	Data Conversion
A.2.5.7	Data Storage & Archiving
A.2.5.8	Integration
A.2.5.9	Reporting
A.2.5.10	System Administration
A.2.5.11	System Capacity & Performance
A.2.5.12	System Flexibility
A.2.5.13	Technology Platform
A.2.5.14	Usability
A.2.5.15	Accessibility
A.2.5.16	Enterprise Content Management (ECM)

Defining the functional and technical capabilities for CoR's ERP

More details are in Section 4 (Scope of Services) and the individual attachments for each functional and technology area requirements:

- **Financials & Budget Management**
Financial Management services focus on optimizing financial operations across CoR ensuring accurate, efficient financial management that supports overall City Operations. The Vendor should provide implementation services for a financial solution that supports general accounting, manage treasury/ cash, procurement, accounts payable and receivable, support finance relations & requests, manage fixed assets, manage and process payroll pension, manage general ledger and financial reporting, manage grants, and perform period close. The vendor should

demonstrate proficiency in implementing solutions that automate financial transactions and reduce errors. Real-time financial reporting and analytics should be implemented to enable the aggregation and analysis of financial data by designated values or codes, supporting data-driven decision-making, transparency, and compliance with state and federal regulations.

The Vendor should offer expert guidance to ensure that best practice configurations are established throughout the implementation process to support CoR's sustainable maintenance.

Budgeting and Planning services ensure efficient financial planning, forecasting, and capital project funding allocation across CoR. The vendor should provide implementation services for a solution that streamlines budget development, capital planning, and financial oversight, ensuring accuracy and alignment with CoR strategic initiatives. The vendor should demonstrate expertise in deploying solutions that enable real-time tracking, reporting, and scenario analysis while minimizing manual intervention. Standardization of budget approval workflows and re-appropriation processes is essential for maintaining fiscal responsibility and compliance. The Vendor should also provide expert guidance to ensure best-practice configurations are implemented and maintained throughout the project.

- **Human Capital Management (HCM)**

HCM services support the full employee lifecycle by centralizing workforce data, enabling accurate reporting, and ensuring secure access to a single source of truth for CoR's strategic initiatives. The vendor should provide implementation services for an HCM solution that supports the administration of Human Resources (HR), acquisition of talent, total awards, HR service delivery, workforce performance, workforce compliance and guidance, and employee relations. The system should track employee progress, streamline workflows, and enforce compliance. Advanced reporting, dashboards, self-service, and resource allocation tools should be available to optimize HCM which is aligned with CoR strategic priorities. The vendor should be able to understand functionality of selected software, translate system functions into viable solutions for CoR to achieve various desired outcomes. The vendor will advise on ways to best utilize the system, improve efficiencies, develop workflows, and be compliant with applicable laws and regulations. The CoR expects the vendor to provide guidance regarding configuration options to best align with CoR operations.

- **Procurement (including Inventory) Management**

Procurement Management services are focused on automating the procurement process across CoR. The Vendor should deliver implementation services for a solution that offers strategic sourcing and manages the purchase of goods and services, vendor relationships, solicitations, supplier contracts, and inventory. Additionally, provide guidance on implementing end-to-end automation, self-service, and robust integration features. The Vendor should provide guidance on best practices for supplier relationship management, contract lifecycle

management, and spend analysis to improve procurement efficiency and compliance. The Vendor should demonstrate expertise in configuring, integrating, and deploying procurement solutions that centralize procurement data, streamline workflows, and enable secure, role-based access for stakeholders.

- **Technology and Service Delivery Capabilities**

Technology and Service Delivery capabilities provide the foundation for a modern, sustainable, scalable, and secure enterprise environment that supports CoR's core Budget and Planning, Finance & Accounting, and HCM functions. The Vendor should implement and configure the solution to deliver high performance, enabling automated workflows, self-service capabilities, secure role-based access, and seamless integration with external systems. The Vendor should demonstrate expertise in configuring and integrating the ERP platform to enable internal CoR systems and external third-party applications. The Vendor should provide guidance on advanced integration capabilities, including identity and access management, audit logging, and secure data exchange, to promote operational efficiency and enhance service delivery in compliance with CoR requirements.

- **SI Services**

In addition to the above, CoR expects the following services and deliverables from the SI vendor. These deliverables will be included in the awarded contract. The table below defines the requested scope of services, aligned with Service Domains. For further details on these services and deliverables, refer to Section 4 Scope of Services.

Table 4: SI Service Capabilities

Service Domain	Deliverable Name
SI Resource Management	SI Staffing Plan
Governance & Project Management	Project Management Plan
	Project Schedule
	Weekly Status Report
Training	Training Plan
	End User Training Materials
Plan and Design	Requirements Validation Report
	Data Quality Plan
	Standard Operating Procedures
	Configuration Management Plan
	As-Built Configuration Documentation
	Data Entry Protocol
	Role Based Access Control (RBAC)
	Solution Design Document(s)
	System Security Plan

	Business Process Framework Inventory
	Enterprise Reporting Strategy and Report Inventory
Configure-Build-Test	Test Management Strategy
	Test Plans
	Test Results Reports
	Test Scripts, Test Cases, Test Scenarios, & Test Data Mapped to Requirements
	RICEFW Register
Data Migration & Data Governance	Data Migration Plan
	Data Migration Strategy
Train	End-User Training Plan
	Administrative User Training Plan
	Train-the-Trainer Plan
	Training Curriculum & Materials
	Training Report
Deploy-Hypercare	Cutover/Deployment Plan/Go-Live Readiness
	Infrastructure Documentation
	Post-Implementation Report
	Successful Deployment Report
Integrations and Third-Party Coordination	Multi-Vendor Integration Plan
	ERP Integration Strategy
Solution Hosting & Provisioning	Downtime Processes & Protocols
	Disaster Recovery Plan
	Infrastructure and Solution Recovery Plan
	Infrastructure Management Plan
Maintenance and Operations	Monthly Quality Assurance Report
	Plan of Action and Milestones (POAM)
	Release Management Plan
	System and User Documentation
	Feature Release Regression Test Suite & Calendar (R1/R2)
	Optional deliverable: Post-Implementation ERP Support & Operating Model
	Optional deliverable: Ongoing Support Staffing Recommendation (roles, skills, FTE)
	Optional deliverable: Support Roles & Responsibilities Matrix (RACI)
	Optional deliverable: Post-Go-Live Data Governance Framework
	Optional deliverable: Post-Go-Live Governance Framework & Charter
Knowledge Transfer and Exit Transition	Exit Transition Plan
	Final Acceptance Document
	Knowledge Transfer Plan

	Knowledge Transfer Completion & Competency Certification
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1.5 Volumes and Quantities

The table below depicts the breakdown and estimates ERP user base by functional roles. These estimates are provided for planning purposes only.

Table 6: CoR volumes and quantities per ERP functional roles

Function	Full-Time/ Permanent Part time	Temporary	Total # of Users
Finance (including AP, Budgeting, Projects & Treasury, Procurement, Contract & Inventory Management)	1,786	52	1,838
Human Capital Management	4,262	3,000	7,262
Procurement, Contract & Inventory Management	1,786	52	1,838

The following table contains functional statistics of the City. These statistics are estimates and are provided for planning purposes only.

Table 7: Functional Area Statistics

General Ledger and Financial Reporting	
Number of Funds	74
Number of Accounts	~2,700
Number of Journal Entries Annually	~10,000
Chart of Accounts Structure	The City's Chart of Accounts (COA) structure is identified below and is split into the below segments: Fund: 3 digits Department: 4 digits Account: 6 digits 100000 are cash accounts, 200000 are liability accounts, 400000 are Fund balance accounts and 500000 are revenue, - 600000 are salary and 700000 are expense accounts)

	Project: 8 digits Program: 3-5 digits The City is evaluating the possibility of updating the current chart of accounts structure.
Budgeting	
Budget Narrative:	
General Fund Budget	\$657.1M (2026)
Enterprise Fund(s) Budget	\$703.4M (2026)
Capital Budget – All Fund(s)	\$598M (2026)
Procurement	
Number of Purchase Orders per Year	14,300
Number of purchase cards in use	1,100
Revenue Services (Accounts Receivable)	
Payments Processed	25,000
Billing Invoices	21,000
Collections	\$11,000,000
Accounts Payable	
Vendors Record	7,782
Number of Invoices Submitted for payment	64,000
Number of 1099's issued per Year	475
Payroll and Compensation	
Number of W2's per Year Approx	7,500
Pay Frequency	Bi-weekly, multiply pay cycles in place
Number of employees paid bi-weekly	~5,500
Payment Methods	Direct Deposit, Check

1.6 Request for Proposal (RFP) Timeline

Provided below is a list of the anticipated schedule of events related to this solicitation. The City of Raleigh reserves the right to modify and/or adjust the following schedule to meet the needs of the service. All times shown are Eastern Time (EST):

RFP Process	Date and Time
RFP Date	<i>September 11, 2026</i>

Pre-Proposal Meeting/Site-Visit (if required)	<i>September 18, 2026, at 10 AM EST</i>
Deadline for Written Questions	<i>September 21, 2026, at 2 PM EST</i>
City Response to Questions (anticipated)	<i>September 25, 2026</i>
Proposal Due Date and Time	<i>October 2, 2026, at 3pm EST</i>
Vendor Interviews/Presentations – In-Person (Required)	<i>November 16 to November 20, 2026</i> <i>(0.5 Day per Vendor)</i> <i>Note: Vendor should be available to present on one of the days. Timeframe is firm.</i>
Selection Announced (tentative)	<i>December 2026</i>

1.7 **Pre-Proposal Virtual Meeting**

A Pre-Proposal meeting will be held, September 18, 2026 at 10.00 AM EST

Link to Register (no later than Day, September 17, 2026, at 3 PM EST) for Pre-Proposal Virtual Meeting:

<https://events.gcc.teams.microsoft.com/event/06aa5e11-48f3-43f8-a9fd-010f6c556ca0@f03ae146-d945-4924-95c0-7b661c30ddbb?source=copyLinkLegacyShareEventDialog>

While participation in the pre-proposal meeting is not required, all prospective vendors are strongly encouraged to attend and participate. This session will include an overview of the RFP scope, key objectives, timeline expectations, and will provide an opportunity to ask clarifying questions that may inform the preparation of your proposal. The City shall issue addenda reflecting questions and answers to this RFP, if any, and shall be posted to North Carolina electronic Vendor Portal ([eVP](#)).

1.8 **Proposal Questions**

Requests for clarification and questions to this **RFP must be received by the City not later than the date shown above in the RFP Timeline (Section 1.6) for the submittal of written inquiries. The Vendor's failure to request clarification and submit questions by the date in the RFP Timeline above shall be considered to constitute the Vendor's acceptance of all City's terms and conditions and requirements.**

The City shall issue addenda reflecting questions and answers to this **RFP, if any, and shall be posted to North Carolina electronic Vendor Portal ([eVP](#)).** No information, instruction or advice provided orally or informally by any City personnel, whether

made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors can only rely on written material contained in an Addendum to this RFP.

It is important that all Vendors submitting to this RFP periodically check eVP for any Addenda. It is the Vendors responsibility to ensure that all addenda have been reviewed and, if required signed and returned.

All questions related to this solicitation must be submitted in writing (via email) to the following individual – questions submitted via telephone will not be answered:

Contact Name	Email Address
Parijat Malla	Parijat.Malla@raleighnc.gov

Vendors shall not contact other City staff with any questions or inquiries. Unauthorized contact with any personnel of the City may be cause for rejection of the Vendor's response.

1.9 Proposal Submission Requirements and Contact Information

Proposals must follow the format as defined in Section 2 (PROPOSALS), and be addressed and submitted as follows:

Preferred method is to submit proposals electronically as a viewable and printable Adobe Portable Document File (PDF) (Word and Excel documents are also acceptable) by submitting a form at https://formsdev.raleighnc.gov/form/cor_rfp_dev. No other file types are permitted.

1.9.1 Electronic Bid/Proposal Submission – Instructions

- **Open the submission form:** [City of Raleigh Electronic Bid Submission Form](#)
- **Complete the information:** Solicitation/Proposal Number, Advertisement Date, Vendor Name, Email, Phone Number, and Solicitation Title.
- **Add attachment details and upload all required bid/proposal documents** using **Browse** or drag-and-drop.
- **Click Submit** and wait for the submission to process.

The PDF electronic version must be received by the City on or before the RFP due date and time provided in Section 1.6. Proposals received after the RFP due date and time will not be considered. Proposals that arrive after the due date and time will not be accepted or considered for any reason whatsoever.

Vendors must respond to the entire Request for Proposals (RFP). Any incomplete proposal may be eliminated from competition at the discretion of the City of Raleigh. The City reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest.

1.10 Business Engagement & Opportunities

The City of Raleigh maintains processes to conduct business with all business enterprises, including small, emerging, growing, under-capitalized, and under-resourced vendors or organizations.

1.11 Rights to Submitted Material

All proposals and supporting materials, as well as correspondence relating to this RFP, shall become the property of the City. The content of all submittals will be held confidential until the selection of the Vendor is made. Proposals will be reviewed by the Evaluation Team, as well as other City staff and members of the general public who submit public record requests. Any proprietary data must be clearly marked. In submitting a Proposal, each Vendor agrees that the City may reveal any trade secret materials contained in such response to all City staff and City officials involved in the selection process and to any outside consultant or other third party who serves on the Evaluation Team or who is hired by the City to assist in the selection process.

Proposals marked entirely as “confidential”, “proprietary”, or “trade secret” will be considered non-responsive and will be removed from the evaluation process.

1.12 Communications

All communications of any nature regarding this RFP with any City staff, elected City officials, evaluation committee members, are strictly forbidden from the time the solicitation is publicly posted until award. Questions must be submitted in writing to the individual designated in Section 1.1 (Purpose), prior to the deadline provided in the RFP Timeline (Section 1.6). Violation of this provision may result in the Vendor’s proposal being removed from consideration.

1.13 Lobbying

By responding to this RFP, the Vendor certifies that it has not and will not pay any person or vendor to influence or attempt to influence an officer or employee of the City or the State of North Carolina, or any elected official in connection with obtaining a contract as a result of this RFP.

1.14 Conflicts of Interest

City of Raleigh contracts are controlled by three conflict of interest provisions.

First, federal procurement standards provide in 2 CFR 200.318 (c)(1),

No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or a vendor which employs or is about to employ any of the parties indicated herein, has a financial or other interest in

or a tangible personal benefit from a vendor considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts.

Similarly, the North Carolina General Statutes provides a *criminal* statute for conflicts of interest in public contracting. N.C.G.S. § 14-234(a):

(1) No public officer or employee who is involved in making or administering a contract on behalf of a public agency may derive a direct benefit from the contract except as provided in this section, or as otherwise allowed by law. (2) A public officer or employee who will derive a direct benefit from a contract with the public agency he or she serves, but who is not involved in making or administering the contract, shall not attempt to influence any other person who is involved in making or administering the contract. (3) No public officer or employee may solicit or receive any gift, favor, reward, service, or promise of reward, including a promise of future employment, in exchange for recommending, influencing, or attempting to influence the award of a contract by the public agency he or she serves.

City of Raleigh Charter Section 3.9 regulates private transactions between the City and its officials and employees. The Charter states:

No member of the City Council, official, or employee of the City of Raleigh shall be financially interested, or have any personal beneficial interest, either directly or indirectly, as agent, representative, or otherwise, in the purchase of, or contract for, or in furnishing any materials, equipment or supplies to the City of Raleigh, nor shall any official or employee of the City of Raleigh accept or receive, or agree to accept or receive, directly or indirectly, from any person, vendor or corporation to whom any contract may be awarded or from whom any materials, equipment or supplies may be purchased by the City of Raleigh, by rebate, gift, or otherwise, any money or anything of value whatsoever, or any promise, obligation or contract for future reward or compensation, for recommending or procuring the uses of any such materials, equipment or supplies by the City of Raleigh; no member of the City Council, official or employee of the City of Raleigh shall for his own personal benefit operate, directly or indirectly, any concession in any building or on any lands of the City of Raleigh, nor shall any official or employee of the City of Raleigh bid for or be awarded any contract granting concessionary rights of any nature or kind from the City of Raleigh; it shall be unlawful for any member of the City Council, official or employee of the City of Raleigh to bid for or to purchase or to contract to purchase from the City of Raleigh any real estate, equipment, materials, or supplies of any nature or kind whatsoever, either directly or indirectly, at either public or private sale, either singly, or through or jointly with any other person.

1.15 Proposer Expenses

The City of Raleigh will not be responsible for any expenses incurred by any Vendor in the development of a response to this Request for Proposal or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to City of Raleigh and/or its representatives. Further, the City of Raleigh shall reserve the right to cancel the work described herein prior to issuance and acceptance of

any contractual agreement/purchase order by the recommended Vendor even if the awarding authority for each entity has formally accepted a recommendation.

1.16 Proposer Acceptance

Submission of any proposal indicates a Vendor's acceptance of the conditions contained in this RFP. Furthermore, the City of Raleigh is not bound to accept a proposal on the basis of lowest price, and further, the City has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities and reserves the right to re-advertise this RFP with either the identical or revised scope and specifications if it is deemed to be in the best interests of the City to do so.

The City of Raleigh reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Vendors if it is deemed in the best interest of the City to do so. Moreover, the City reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the City.

2 PROPOSALS

Submitted proposals must follow the format outlined below. The City may reject as non-responsive at its sole discretion any proposal that does not provide complete and/or adequate responses or departs in any substantial way from the required format.

2.1 Request for Proposals Required Document Format

Proposals should be divided into sections with Table of Content to easily identify and separate each section as follows:

2.1.1 Section/Tab 1: Cover Letter

Provide an introduction letter summarizing the Vendor's unique proposal to meet the needs of this service requirement. This letter should be presented on the Vendor's official letterhead and signed by an authorized representative who has the authority to enter into a contract with the City on behalf of the Vendor. Additionally, include the name, address, telephone and email address of the individual who serves as the point of contact for this solicitation.

2.1.2 Section/Tab 2: Company Qualifications and Experience

Company Qualifications

Include background information on the Vendor and provide detailed information regarding the Vendor's experience with similar ERP implementations (i.e., experience with Workday, with in-scope business processes and experience with Cities with similar size, scope and complexity to Raleigh).

Experience with the Software Vendor

Provide detailed information about the Vendor's direct experience working with Workday. Describe previous projects where the Vendor has implemented Workday's ERP products, outlining its familiarity with the tools, methodologies, and support processes. Highlight specific examples that demonstrate the Vendor's understanding of the ERP vendor's solutions and its ability to leverage its resources effectively throughout the implementation lifecycle.

Experience in implementing the business processes

Describe the Vendor's experience in implementing the specific ERP business processes i.e., Finance & Budget Management, HCM, and Procurement & Inventory Management. The response should demonstrate the Vendor's understanding of the City's business objectives, regulatory and operational environment, and approach to aligning leading practices with the City's requirements. Vendors should provide relevant implementation examples, highlight key business process transformations achieved, describe lessons learned and challenges encountered, and explain how their implementation methodology supports successful adoption and realization of business outcomes across each functional area.

Project understanding

Demonstrate the Vendor's understanding of the City's needs, objectives and unique challenges. Reference specific details from the City's requirements and explain how the Vendor's proposed approach and communications reflect an awareness of the City's goals and context. Clearly articulate how the Vendor's experience and methodology are tailored to meet CoR's priorities and address any complexities or constraints identified in the project documentation.

References

Provide a list of all similar contracts performed in the past 5 years, accompanied by at least 2 references (contact person, telephone number and email address). Include the total amount invoiced for each listed project, the length of the project, and list of those involved in the project who are also proposed for the subject project named in this solicitation. Fill out the Reference Questionnaire form (Appendix III) for each reference provided. **Failure to provide a list of all similar contracts in the specified period may result in the rejection of the Vendor's proposal.** The evaluation team reserves the right to contact any or all listed references, and to contact other public entities regarding past performance on similar projects. Preference will be given to vendors proposing key personnel (e.g., Project Manager, Functional Manager(s), Technical Manager, OCM and Training Manager) who have successfully delivered implementations included in the submitted references.

Financial Information and Stability

Review and provide one of the following three (3) financial statement options:

1. Recent audited or reviewed financial statements prepared by an independent certified public accountant (CPA) that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement **and**, if the audited or reviewed financial statements were prepared more than six (6)

months prior to the issuance of this RFP, the Vendor shall submit its most recent internal financial statements (balance sheet, income statement and cash flow statement or budget with entries reflecting revenues and expenditures from the date of the audited or reviewed financial statements to the end of the most recent financial reporting period (i.e., the quarter or month preceding the issuance date of this RFP)).

OR

2. Recent compiled financial statements prepared by an independent CPA that shall include, at a minimum, a balance sheet, income statement (i.e., profit/loss statement) and cash flow statement **and**, if the compiled financial statements were prepared more than three (3) months prior to the issuance of this RFP, the Vendor shall submit its most recent internal financial statements (balance sheet, income statement and cash flow statement or budget with entries reflecting revenues and expenditures to date), and other evidence of financial stability such as most recently filed income tax return, evidence of a line of credit/loans/other type of financing with statement of amount in use/outstanding balance (e.g., a complete copy commitment letter, loan agreement, billing statement reflecting the line of credit or statement from lender acknowledging the commitment to fund the Proposer's stated financing), personal guaranty with copies of personal income tax filing and statement of net worth or such other evidence that is accurate, reliable and trustworthy regarding the Vendor's financial stability.

OR

3. Include a certified, signed statement from a licensed CPA regularly engaged in the review of the Vendor's financial information verifying the financial viability of the Vendor.

All financial information, statements and/or documents provided in response to this solicitation shall be kept confidential provided that EACH PAGE is marked as follows: "CONFIDENTIAL – DO NOT DISCLOSE EXCEPT FOR THE EXPRESS PURPOSE OF PROPOSAL EVALUATION."

"Recent" shall be defined as financial statements that were prepared within the 12 months preceding the issuance date of this RFP.

Consolidated financial statements of the Vendor's parent or related corporation/business entity shall not be considered, unless: (1) the Vendor's actual financial performance for the designated period is separately identified in and/or attached to the consolidated statements, (2) the parent or related corporation/business entity provides the State with a document wherein the parent or related corporation/business entity will be financially responsible for the Vendor's performance of the contract and the consolidated statement demonstrates the parent or related corporation's/business entity's financial ability to perform the contract, financial stability and/or such other financial considerations identified in the evaluation criteria; and/or (3) Vendor provides its own internally prepared financial statements and such other evidence of its own financial stability identified above.

The Vendor's failure to provide any of the above-referenced financial statements may result in the proposal being removed from consideration. Vendors are also encouraged to explain any negative financial information, and to provide documentation supporting those explanations and demonstrating the financial strength of the Vendor.

2.1.3 Section/Tab 3: Team Vendor, Experience and Certifications

SI Team Key Personnel – Relevant Working Experience

This section must include the proposed staffing, deployment and vendor personnel to be assigned to this project. The Vendor shall provide information as to the Proposals and experience of all executive, managerial, and other key personnel assigned to the project, including at a minimum the Project Manager, Functional Lead(s), Technical/Integration Lead, Data Migration Lead, and Organizational Change Management/Training Lead. Include resumes or summaries that highlight their qualifications and previous experience with similar ERP implementations. A project-specific vendor chart which clearly illustrates the roles, responsibilities, and the reporting relationships of each team member should be included. The SI commits that proposed Key Personnel will be assigned to the CoR engagement and will not be reassigned or replaced without CoR's prior written consent, except in cases of resignation, termination, extended leave, or other circumstances beyond the SI's reasonable control. Any replacement must possess qualifications and experience equal to or greater than those of the person being replaced and is subject to CoR's review and approval. CoR reserves the right to interview proposed Key Personnel and, during the engagement, to require the removal and replacement, at the SI's expense, of any assigned personnel whose performance CoR reasonably determines to be unsatisfactory.

Staff Planning Alignment (Functional, Tech, PMO Coverage and Continuity):

Describe the Vendor's staffing plan for this project, ensuring that the vendor addresses how resources will be allocated to provide comprehensive coverage across functional, technical, and PMO roles. Explain how the Vendor will maintain continuity of key staff throughout the project lifecycle to support successful delivery. The key personnel being proposed for this project team should be the key personnel that the references are for.

2.1.4 Section/Tab 4: Proposed SI Services

Implementation Approach & Timeline

Please describe the Vendor's proposed implementation approach, including sequencing rationale and deployment strategy for the in-scope ERP functional capabilities. Outline the Vendor's methodology, project phases, key milestones, and the overall timeline for delivering the ERP implementation.

Scope of SI Services

Provide details on how the Vendor's organization will address each aspect of the implementation services scope, including planning, design, build/configuration, testing, data migration, integration, and any other relevant activities. A description of each task and deliverable and the schedule for accomplishing each shall be included.

Program Management

Explain the Vendor's approach to program management, covering governance structures, risk management strategies, status reporting processes, and methods for effective stakeholder communication throughout the project.

2.1.5 Section/Tab 5: Contract Alignment and Due Diligence

Contract Terms and Conditions

Please describe how the Vendor's proposed contract terms and conditions align with the City's requirements, including provisions for pricing protections, deliverables, warranties, data security, indemnification, and liability. Clearly explain how the Vendor's terms support CoR's risk management objectives and address any specific concerns outlined in the City's documentation.

Service Level and Performance Commitments

Platform availability, uptime, and disaster recovery are governed by the City's separate subscription agreement with Workday and are out of scope for this section. Describe the service levels and performance commitments the Vendor will stand behind for the implementation engagement, including response and resolution targets by severity during hypercare and any warranty period, defect-resolution turnaround for delivered configuration, and commitments to deliverable quality and on-time performance against the accepted project schedule. Identify the remedies that apply if committed service levels or milestones are not met. Where the Vendor proposes optional post-implementation managed services, provide the associated service level agreements separately.

2.1.6 Section/Tab 6: Cost

Please submit Proposal Cost Form and any additional itemized cost breakdown or price schedule. Hourly rates shall be fully burdened to include all costs, all applicable overhead and profit (including lodging, meals, and transportation). Attach any additional pricing details. The City has provided a pricing sheet (ref: [attachment 2](#) to be used by the vendors for the implementation costs.)

2.2 RFP Documents

This RFP is comprised of the base RFP document, any attachments, and any addenda released before the contract is awarded. All attachments and addenda released for this RFP in advance of any contract award are incorporated herein by reference.

3 PROPOSAL EVALUATION

3.1 Proposal Evaluation Criteria (Stage 1)

The City assesses each Offer for Responsibility and Responsiveness. The City considers the information provided and the quality of that information when assessing Offers. If the City finds a failure or deficiency, the City may reject the Offer or reflect the failure or deficiency in the assessment.

The proposals received in response to this RFP will be evaluated and ranked by the evaluation committee in accordance with the process and evaluation criteria contained below. Responses will be evaluated in light of the material and substantiating evidence presented in the response and not based on what is inferred. After thoroughly reading and reviewing this RFP, each evaluation committee member shall conduct his or her independent evaluation of the proposals received and grade the responses on their merit in accordance with the evaluation criteria set forth in the following table.

The maximum interview/demonstration points an Vendor can receive is five (5) points. The Vendors selected for interviews/demonstrations under this section will be notified in writing of the date and time. The Vendors' interview/demonstrations shall be based solely upon information provided in each Vendor's original proposal. No new information may be presented.

Criteria	(a) Weight	(b) Score (0-5)	(a) x (b) Weighted Score
SI Qualifications and Experience	22		
Company Qualifications and Financial Stability <i>Evaluation of the SI vendor's business credentials, reputation, and financial health to ensure their ability to support the ERP implementation.</i>	2.5		
SI Vendor's Experience with Software Vendor <i>Review of the SI's experience working specifically with the selected ERP software vendor and their familiarity with implementing the vendor's products, tools, and methodologies.</i>	2.5		
Project Understanding <i>Determination of the SI's grasp of the City's needs, objectives, and unique challenges, as demonstrated in their proposal and communications.</i>	4		
Experience with In-scope Business Processes <i>Assessment of the SI's experience implementing ERP solutions for the specific business processes included</i>	5		

<i>in the project scope (i.e., Finance & Budget Mgmt., HCM, Procurement & Manage Inventory).</i>			
References (2) <i>Verification of the ERP solution vendor's performance and reliability through feedback from current or past clients, with similar operational and technical requirements. The City may contact references or other clients to verify the proposer's performance or related information as part of the evaluation.</i>	8		
SI Project Team Experience and Staffing	20		
SI Team Key Personnel – Relevant Working Experience <i>Assessment of the relevant experience and expertise of key personnel (and their resumes) assigned to the project, including project managers, solution architects, and functional leads.</i>	12.5		
Staff Planning Alignment (Functional, Technology, PMO Coverage and Continuity) <i>Review of the SI's staffing plan (i.e., resources and level of staffing) to ensure adequate coverage across functional, technical, and project management office (PMO) roles, and continuity throughout the project.</i>	7.5		
Proposed Services	40		
Implementation Approach and Timeline <i>Evaluation of the SI's implementation approach (HCM-first or Finance-first), proposed methodology, project phases, milestones, and overall timeline for delivering the ERP implementation.</i>	15		
Scope of SI Services <i>Assess the SI's ability to meet the scope of the proposed implementation services (such as plan, design, build/configure, test, data migration, integration, etc.)</i>	15		
Program Management	10		

<i>Assess the SI's approach to managing the overall program, including governance, risk management, status reporting, and stakeholder communication.</i>			
Contract Alignment and Due Diligence	8		
Contract Terms and Conditions <i>Evaluation of the SI's alignment with the City's Contract Terms & Conditions, including provisions related to pricing protections, deliverables, warranties, data security, indemnification, and liability, and the extent to which proposed terms support the City's risk management objectives.</i>	2		
SLA Alignment <i>Evaluation of the Service Level Agreement (SLA) to ensure it meets the City's expectations for deliverables and performance guarantees.</i>	6		
Price <i>Assess the overall cost proposal for implementation services provided by the SI, including consulting fees, configuration, customization, data migration, training, project management and additional expenses.</i>	10		
Total Score			
Interview/Demonstrations			(0-5)
Total Score			

Evaluation:

0 – Does Not Meet Requirements: The response fails to address the criterion or does not demonstrate the capability to meet the City's requirements.

1 – Partially Meets Requirements: The response addresses the criterion but contains material weaknesses, deficiencies, or insufficient supporting information.

2 – Meets Requirements: The response adequately addresses the criterion and demonstrates the capability to successfully meet the City's requirements.

3 – Exceeds Requirements: The response demonstrates a particularly strong understanding, approach, experience, capability, or other meaningful advantage relevant to the criterion.

4 – Significantly Exceeds Requirements: The response provides exceptional value, innovative solutions, or outstanding qualifications that substantially surpass the City's requirements.

5 – Outstanding: The response sets a benchmark for excellence, offering superior value, unique advantages, or exemplary performance that far exceeds expectations.

Score Points

Cost Formula: The cost criterion is rated by giving the proposal with the lowest total cost the maximum number of Cost points available. The remaining proposals are rated by applying the following formula:

$$1 - \frac{B - A}{A} \times C = D$$

A—the lowest Proposer's cost.

B—the Proposer's cost being scored.

C—the maximum number of cost points available.

D—Proposer's cost score (points).

Note: If the formula results in a negative number (which will occur when the Vendor's cost is more than twice the lowest cost), zero points shall be assigned.

3.2 Interview/Presentation (Stage 2)

A short-list of Vendors may be invited to Stage 2, Interview/Presentation, step of the evaluation process. Interview/presentations are an important aspect of the evaluation process that offers the City an opportunity to see how the Vendor's solution meets the critical components of the RFP.

The presentations for each SI will span half day with the potential for virtual follow-ups if determined to be required by CoR. Initial topics for presentation have been flagged in the RFP for inclusion in the presentation section.

This Stage 2 will be scored by each Evaluation Committee member using the same 0–5 rating scale set out in Section 3.1, applied to the points available for this stage. The points will be added to each short-listed Vendor's Stage 1 score to determine the final evaluated score used for ranking.

3.3 Final Selection

Proposals will be evaluated and ranked according to the criteria and weighted values set forth in Section 3.1. Either a final selection for recommendation will be made at this time or the short-list of Vendors will be invited to participate in Stage 2 of the evaluation process. If Stage 2 is implemented, each Vendor will be evaluated and assigned a score to determine the best Vendor for recommendation.

After which negotiations of a contract with the most qualified Vendor will commence. If negotiations are unsuccessful, the City will then pursue negotiations with the next most qualified Vendor. All Vendors will be notified of their standing immediately following the City's decision.

Award of contract is subject to COR and SI agreement on the contract terms in a timely manner. The City shall not be bound or in any way obligated until both parties have executed a contract. The City also reserves the right to delay the award of a contract or to not award a contract.

3.4 Notice to Proposers Regarding RFP Terms and Conditions

It shall be the Vendor's responsibility to read the RFP Instructions, the City's contract terms and conditions (within the sample City Service Contract provided in Appendix IV), all relevant exhibits, attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

3.5 Contract Term

The contract issued by the City to the awarded Vendor will define either a completion date by which the services are to be completed and finished, or a term date by which the services will begin and be provided repeatedly over a specific period. The details of the contract term and any options to renew or extend the contract, will be stated in the contract issued by the City. See Appendix IV for a sample-version of the City's contract for services.

3.6 Vendor Risk Assessment Requirement

As a condition of contract award, the vendor(s) selected as a result of this solicitation will be required to complete the City's Vendor Risk Assessment (VRA) process prior to contract execution and/or prior to commencement of services. This process includes, at a minimum, completion of the City's Vendor Security Questionnaire (VSQ) and may include review of supporting documentation (e.g., information security policies, independent audit reports, compliance certifications) at the City's request.

Proposers should anticipate the following:

- The VSQ will be issued to the apparent successful proposer(s) following notice of intent to award, or at another point in the process specified by the City.
- Responses to the VSQ must be complete, accurate, and supported by any documentation requested by the City or its designated assessor.
- The City (or a third party acting on the City's behalf) may follow up with clarifying questions or requests for additional information.
- Findings from the assessment may result in required remediation, additional contractual security or privacy requirements, or specific risk-mitigation terms as a condition of final contract execution.

- Failure to timely complete the VRA process, or failure to adequately address risks identified during the process, may result in the City declining to proceed with contract execution, notwithstanding any prior notice of intent to award.

Completion of the VRA process does not guarantee contract award and does not relieve the vendor of any other requirement of this solicitation or the resulting contract. Questions regarding the Vendor Risk Assessment process or the Vendor Security Questionnaire may be directed to parijat.malla@raleighnc.gov.

4 SCOPE OF SERVICES

The Scope of Services defines the work to be performed by the selected Vendor in support of the City's project objectives. The Vendor shall provide all labor, expertise, tools, and resources necessary to successfully perform the services described herein, in accordance with applicable laws, regulations, and industry's best practices. Services shall be delivered in close coordination with the City, consistent with established governance, schedules, and performance requirements.

4.1 SI Resource Management

SI shall develop and maintain a comprehensive staffing plan that ensures the availability of qualified resources to meet project objectives across all phases of the ERP implementation. The SI's staffing plan must detail the proposed organizational structure, key roles and responsibilities, and resource allocation. The SI will be responsible for ensuring timely deployment of resources, proactive communication regarding staffing needs or changes, and alignment with CoR's project milestones and governance requirements.

4.2 Governance & Project Management

The SI will partner with CoR to deliver a comprehensive ERP transformation, working within an established governance framework that includes a core project team, business and technology leads, and a structured decision-making process. The SI will collaborate with CoR's Program Leads, Project Manager, Business Process and Functional Leads, and Steering Committee to ensure successful planning, execution, and delivery of all project phases. Responsibilities include providing best practice guidance on ERP configuration, program and project management, resource planning, contract and financial management, and performance monitoring. The SI will deliver input and recommendations on project governance, risk mitigation, and change management, and will participate in regular progress reporting, quality assurance, and stakeholder communications. The SI will also play a key role in relationship management, ensuring adherence to contract terms, supporting financial administration, and driving continuous improvement and value realization throughout the engagement. All services will be delivered in close coordination with CoR, with clear roles, responsibilities, and escalation protocols defined to ensure project success, transparency, and alignment with CoR's strategic objectives. CoR, at its discretion, will leverage and utilize third-party vendor for advisory and oversight support.

4.3 Plan & Design

The SI will collaborate closely with CoR to provide planning and design services that ensure alignment on project scope, governance, roles, resource planning, and core program components, all in accordance with CoR's guiding and engagement principles. The SI will be responsible for developing and refining project plans, methodologies, and deliverables, including milestone-based schedules, resource strategies, and risk mitigation approaches. The SI will lead the delivery of initial core team and solution training, conduct gap/fit and requirements analyses, and apply proven methodologies and industry best practices to define optimal solution designs, data migration, reporting, integration, and security strategies. The SI shall deliver an Enterprise Reporting Strategy and an inventory of ERP reports, dashboards, and analytics. Additionally, the SI will develop and execute test planning and design, and proactively drive value realization activities by linking solution components to measurable business outcomes. The SI shall document and maintain a Business Process Framework Inventory identifying configured Workday business processes, their purpose and workflows. The SI will also maintain As-Built Configuration Documentation that reflects the final approved ERP configuration, including key business processes, security configurations, integrations, reports, and workflow designs to support ongoing operations and knowledge transfer. Throughout, the SI will ensure knowledge transfer, stakeholder engagement, and minimal disruption to CoR's daily operations, while supporting quality assurance and continuous improvement in partnership with CoR.

4.4 Configure-Build-Test

The SI will deliver Configuration, Build, Test, and Value Realization services for CoR's ERP platform, leveraging proven methodologies and industry best practices to optimize solution performance and business outcomes. The SI will configure the ERP system using out-of-the-box and accelerated capabilities, ensuring standardization and flexibility while minimizing customizations. Build services will encompass the development, unit testing, and documentation of all approved components, including reporting, analytics, integrations, data migration, extensions, forms, workflows, security, and mobile applications. The SI will lead and execute end-to-end testing activities—covering functional, integration, migration, performance, security, and user acceptance testing—while maintaining quality assurance and knowledge transfer throughout. Services will be integrated across all phases, with the SI facilitating benefit tracking, business case alignment, and continuous improvement in collaboration with CoR stakeholders. Throughout, the SI will provide ongoing knowledge transfer, documentation, and proactive guidance to ensure CoR's self-sufficiency and successful adoption of the configured solution.

4.5 Training

SI will deliver comprehensive training services throughout all phases of the program, utilizing proven methodologies and industry best practices to ensure effective education

and enablement of end users. The SI will lead the design, development, and execution of training strategies, including the creation of tailored training programs, materials, and knowledge transfer activities to build CoR's self-sufficiency and ensure cut-over confidence. The SI will provide timely education and tools to CoR personnel, actively supporting end user participation and readiness. During deployment and hypercare, the SI will continue to deliver training and post-go-live support, working collaboratively with CoR to maximize solution adoption and realize targeted business benefits. The SI shall provide practical tools, documentation, and learning resources designed to promote user readiness, adoption, and long-term self-sufficiency. Training activities shall align with deployment milestones and support organizational readiness across all impacted stakeholder groups.

4.6 Deploy Hypercare

The SI will deliver Deployment, Hypercare, and Extended Support services to ensure a smooth transition to the new ERP solution across all phases and locations. CoR requires a minimum of 3 months of hypercare & post go-live support. Vendors can propose an extended post-go-live support duration based on their proposed solution deployment approach. Deployment services include final preparations, operational readiness assessments, cutover planning, and go-live execution, with proactive coordination to minimize business disruption and ensure data, process, and IT support readiness. Hypercare services provide immediate post-go-live support for a defined period, assisting CoR with troubleshooting, training, incident management, and stabilization, while facilitating knowledge transfer and enabling self-sufficiency for CoR and its third-party support teams. Extended Support services offer ad-hoc assistance during critical business cycles, such as quarter-end and year-end processing. Throughout these phases, the SI will manage and refine the business case, track and measure benefits, and provide best practice guidance to optimize solution adoption and value realization. All activities will be delivered collaboratively with CoR stakeholders, ensuring transparency, documentation, and alignment with CoR's governance and operational objectives.

4.7 Data Migration & Data Governance

The SI will be responsible for leading and executing comprehensive data migration services to ensure accurate, complete, and timely conversion of legacy data into the ERP system. This includes data assessment, cleansing, mapping, validation, reconciliation, and migration planning across all in-scope modules. The SI will collaborate with CoR stakeholders to define data ownership, retention, and governance standards, and will perform multiple test migrations prior to final production cutover. The SI will document all data migration processes and ensure auditability, traceability, and compliance with public-sector data retention and transparency requirements. It should be noted that CoR has partnered with another vendor to inventory its data, identify data ownership and retention standards, all of which will assist the SI in its Data Migration efforts.

4.8 Integrations & Third-Party Coordination

The SI shall assess the City's integration landscape and develop an Enterprise Integration Strategy that defines integration principles, architectural standards, preferred integration methods, governance processes, and future-state recommendations. The SI will design, develop, test, and deploy integrations between the ERP system and CoR's existing and third-party systems, including but not limited to banking, payroll, permitting, billing, reporting, and identity management solutions. The SI will coordinate closely with CoR IT staff and external vendors to ensure secure, reliable, and well-documented interfaces. Responsibilities include defining integration architecture, managing dependencies, resolving issues, and ensuring integrations meet performance, security, and data integrity requirements.

4.9 Security, Compliance & Controls

The SI will ensure that the ERP solution is implemented in compliance with applicable federal, state, and local regulations, as well as CoR policies and public-sector best practices. This includes supporting security architecture, role-based access controls, segregation of duties, audit logging, and compliance with applicable standards (e.g., SOC, NIST, IRS, CJIS, or other relevant requirements). The SI will support security reviews, audits, and documentation requests throughout the project lifecycle and ensure controls are tested and validated prior to go-live.

4.10 Change Management & Stakeholder Engagement

The SI will provide structured change management services to support organizational readiness, adoption, and successful transition to the new ERP system. This includes stakeholder analysis, change impact assessments, communication planning, readiness evaluations, and reinforcement strategies. The SI will work collaboratively with CoR leadership and business units to promote user engagement, minimize resistance, and support sustained adoption of new processes and technologies.

4.11 Quality Assurance, Risk & Issue Management

The SI will implement quality assurance practices throughout all phases of the program to ensure deliverables meet agreed-upon standards, requirements, and acceptance criteria. The SI will proactively identify, document, and manage risks, issues, and dependencies, providing mitigation strategies and escalation in accordance with CoR's governance framework. The SI will support independent verification and validation (IV&V) activities, if applicable, and will address findings in a timely and transparent manner.

4.12 Maintenance and Operations

The SI shall provide Maintenance and Operations services to support the ongoing administration, stability, governance, and continuous improvement of the ERP solution following deployment. Services shall include the development and maintenance of a Monthly Quality Assurance Report to monitor system performance, issue trends, service quality, and compliance with established standards. The SI shall establish and maintain a Plan of Action and Milestones (POAM) to track remediation activities, risks, issues, and continuous improvement initiatives. The SI shall develop a Release Management Plan governing the evaluation, testing, approval, and deployment of system updates, enhancements, and vendor releases. The SI shall also produce and maintain comprehensive System and User Documentation sufficient to support ongoing operations, administration, training, and knowledge transfer. In support of future releases, the SI shall develop a Feature Release Regression Test Suite and Testing Calendar for recurring release cycles (e.g., Release 1 and Release 2) to facilitate system validation and minimize operational disruption. As optional services, the City may request development of a Post-Implementation ERP Support and Operating Model, Ongoing Support Staffing Recommendations including roles, skills, and FTE estimates, a Support Roles and Responsibilities Matrix (RACI), a Post-Go-Live Data Governance Framework, and a Post-Go-Live Governance Framework and Charter to support the City's long-term operational, support, and governance objectives.

4.13 Solution Hosting & Provisioning

The SI shall provide Solution Hosting and Provisioning services to support the secure, reliable, and resilient operation of the City's Workday environment throughout implementation and post-go-live. The SI shall develop and maintain Downtime Processes and Protocols to address planned and unplanned service interruptions, including communication, business continuity, and operational workarounds. The SI shall provide a Disaster Recovery Plan and Infrastructure and Solution Recovery Plan outlining recovery objectives, roles, responsibilities, and procedures for restoring Workday and related integrations following a disruption. The SI shall also develop an Infrastructure Management Plan defining environment management, monitoring, release coordination, security, and operational support processes. All deliverables shall align with Workday leading practices and the City's business continuity, security, and operational requirements.

4.14 Knowledge Transfer and Exit Transition

In addition to phase-specific documentation, the SI shall provide comprehensive functional, technical, and operational documentation to support the City's long-term ownership and maintenance of the ERP solution. The SI shall develop and execute a Knowledge Transfer Plan, conduct formal knowledge transfer activities, and provide evidence of Knowledge Transfer Completion and Competency Certification for designated City personnel. Prior to project closeout, the SI shall develop an Exit Transition Plan to facilitate the transfer of knowledge, responsibilities, and supporting artifacts to the City and/or its designated support provider. The SI shall also prepare a Final Acceptance Document documenting deliverable acceptance, transition readiness, and project completion.

4.15 Deliverable Acceptance & Milestone Payment

The SI's compensation shall be structured around defined deliverables and project milestones rather than effort expended alone. For each deliverable identified in this RFP and the resulting Statement of Work, the SI and CoR will agree in advance on written acceptance criteria. CoR will review each submitted deliverable within a defined review period (proposed at ten (10) business days unless otherwise agreed) and will either accept the deliverable in writing or provide written notice of deficiencies. The SI will remediate identified deficiencies and resubmit for acceptance at no additional cost where the deficiency results from the SI's performance. Payment shall be tied to CoR's written acceptance of the associated milestone or deliverable. CoR intends to retain a holdback (proposed at ten percent (10%) of each milestone payment, to be released upon successful go-live and completion of hypercare, or as otherwise agreed in the final contract. Proposers shall structure their cost proposal (Appendix I) to align pricing with the deliverables and milestones described herein, and shall identify which deliverables they propose to price on a fixed-fee basis versus a time-and-materials basis, including the role-based rates applicable to any time-and-materials or change-order work.

4.16 City Responsibilities & Assumptions

To support timely and successful delivery, CoR will provide reasonable access to the resources, information, and decision-making necessary for the SI to perform the Scope of Services. CoR's responsibilities are expected to include: designating an executive sponsor, program lead, and empowered functional and technical points of contact; making subject-matter experts and business-process owners reasonably available to participate in workshops, design sessions, testing, and training; rendering decisions and approvals within agreed timeframes; providing timely access to systems, environments, data, and documentation reasonably required for the engagement; and coordinating the availability of CoR's other third-party vendors as needed. Proposers shall state the assumptions underlying their proposed approach, timeline, and pricing, including any assumptions regarding CoR staffing levels, resource availability, decision turnaround, environment availability, and the condition and readiness of legacy data. The City will remain fully operational throughout the implementation and transition period, and the SI's proposed approach must account for maintaining ongoing financial and HR operations during the project. Where an SI assumption proves materially incorrect, the parties will address any resulting impact through CoR's established change-control process.

APPENDIX I

PROPOSAL COST FORM

The awarded proposer shall perform the services to be performed as set forth in this RFP and more particularly described in Section 4 for a not to exceed total amount of(ref: [attachment 2](#) to be used by the vendors for the implementation costs.):

\$_____.

Attach proposal cost itemization or breakdown to this Appendix I Proposal Cost Form.

Proposer/Company Name: _____

Authorized Signature _____ Date _____

Signed by: _____
[Type or Print Name]

Title of Signer: _____

APPENDIX II PROPOSER QUESTIONNAIRE

The following questions must be answered, and data given must be clear and comprehensive. If necessary, questions may be answered on separate sheets. The Proposer may submit any additional information desired.

Company Name:		d/b/a (if applicable)	
Street / PO Box:			
City:		State:	Zip:
Phone:		Fax:	E-Mail:
Website (if applicable):			
☐ Sole Proprietor ☐ Partnership ☐ Corporation ☐ Other			
Number of years in business under company's present name:			
Fed Tax ID #:		DUNS #	
Are you registered with the North Carolina Secretary of State to conduct business (if required)? (Check One) YES: ☐ NO: ☐ Not Applicable: ☐			
Are you properly licensed/certified by the Federal and/or State of North Carolina to perform the specified work?			
YES: ☐ NO: ☐ Not Applicable: ☐ ATTACH COPY OF ALL APPLICABLE LICENSING/CERTIFICATION DOCUMENTS			
Are/will you be properly insured to perform the work? YES: ☐ NO: ☐			
Contact for this Contract:		Title:	
Phone:		Fax:	E-Mail:
Have you ever defaulted or failed on a contract? (If yes, attach details) YES: ☐ NO: ☐			
List at least three (2) references for which you have provided these services (same scope/size) in the past three years - preferably government agencies. Do not include City of Raleigh as a reference to meet the requirement of listing at least (3) references. PROPOSERS ARE RESPONSIBLE FOR SENDING REFERENCE QUESTIONNAIRE (APPENDIX III) TO THEIR REFERENCES.			
1.	Company:		
	Contact Person:	Title:	
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
2.	Company:		
	Contact Person:	Title:	
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
3.	Company:		
	Contact Person:	Title:	
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
4.	Company:		
	Contact Person:	Title:	
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
5.	Company:		
	Contact Person:	Title:	
	Phone:	Fax:	E-Mail:
Describe Scope of Work:			
The undersigned swears to the truth and accuracy of all statements and answers contained herein:			
Authorized Signature:		Date:	

APPENDIX III

REFERENCE QUESTIONNAIRE (Instructions)

RFP #274-IT2026-04 –ERP Modernization- System Integrator

The City of Raleigh, as a part of the RFP, requires proposing companies to submit a minimum of two (2) business references as required within this document. The purpose of the references is to document the experience of the proposer relevant to the scope of services and assist in the evaluation process.

- The Proposer is required to send the reference form (the following two pages) to each business reference listed on Proposer Questionnaire.
- The business reference, in turn, is requested to submit the Reference Form directly to the City of Raleigh Point of Contact identified on the Reference Questionnaire form for inclusion in the evaluation process.
- The form and information provided will become a part of the submitted proposal. The business reference may be contacted for validation of the response.
- It is the Proposer's responsibility to verify their references have been received by the City of Raleigh Point of Contact by the date indicated on the reference form.

APPENDIX III

REFERENCE QUESTIONNAIRE FORM

RFP #274-IT2026-04 –ERP Modernization- System Integrator

(Name of Business Requesting Reference)

This form is being submitted to your company for completion as a business reference for the company listed above.

This form is to be returned to the City of Raleigh, **Parijat Malla**, via email to **Parijat.Malla@raleighnc.gov** no later than **3:00 pm EST, October 2, 2026**, and **MUST NOT** be returned to the company requesting the reference.

For questions or concerns regarding this form, please contact the City of Raleigh, Point of Contact above.

Company Providing Reference

Contact Name and Title/Position

Contact Telephone Number

Contact Email Address

Questions:

1. In what capacity have you worked with this company in the past? If the company was under a contract, please acknowledge and explain briefly whether or not the contract was successful.

Comments:

2. How would you rate this company's knowledge and expertise?

☐ 3= Excellent

☐ 2= Satisfactory

☐ 1= Unsatisfactory

☐ 0= Unacceptable

Comments:

3. How would you rate the company's flexibility relative to changes in the scope and timelines?

☐ 3= Excellent

☐ 2= Satisfactory

☐ 1= Unsatisfactory

☐ 0= Unacceptable

Comments:

4. What is your level of satisfaction with hard-copy materials, e.g. reports, logs, etc. produced by the company?
☐ 3= Excellent ☐ 2= Satisfactory ☐ 1= Unsatisfactory ☐ 0= Unacceptable

Comments:

5. How would you rate the dynamics/interaction between the company and your staff?
☐ 3= Excellent ☐ 2= Satisfactory ☐ 1= Unsatisfactory ☐ 0= Unacceptable

Comments:

6. Who were the company's principle representatives involved in providing your service and how would you rate them individually? Would you comment on the skills, knowledge, behaviors or other factors on which you based the rating?
(3= Excellent; 2= Satisfactory; 1= Unsatisfactory; 0= Unacceptable)

Name: _____	Rating: _____
Name: _____	Rating: _____
Name: _____	Rating: _____
Name: _____	Rating: _____

Comments:

7. With which aspect(s) of this company's services are you most satisfied?

Comments:

8. With which aspect(s) of this company's services are you least satisfied?

Comments:

9. Would you recommend this company's services to your organization again?

Comments:

APPENDIX IV

SAMPLE CONTRACT

NORTH CAROLINA
WAKE COUNTY

CONTRACT FOR SERVICES

THIS CONTRACT ("Contract") is entered into by and between _____, hereinafter referred to as the "Contractor", and the City of Raleigh, a North Carolina municipal corporation, hereinafter referred to as the "City".

WITNESSETH:

WHEREAS, the City desires to procure a contractor to perform services; and
WHEREAS, the City has completed necessary steps for retention of professional and other services under applicable City policies; and
WHEREAS, the City has agreed to engage the Contractor, and the Contractor has agreed to contract with the City, for performance of services as described, and according to the further terms and conditions, set forth herein.
NOW THEREFORE, in consideration of sums to be paid to the Contractor, and other good and valuable consideration, the Contractor and City do contract and agree as follows:

1. Scope of Services

The Contractor shall perform for the City the following described services:

•

2. Schedule/Time of Performance

[1.) For a One-time Service Completed by a Specific Date, use the following:]

In performing the services described in this Contract, it is mutually agreed that time is of the essence. The Contract shall be effective upon the date of the City's signature.

The Contractor shall begin work on _____, and work shall be completed no later than _____.

In the event the services under the Contract are not completed by this date, the Contractor shall be assessed liquidated damages of _____ for each day's delay beyond the completion date.

[If liquidated damages are not applicable to this Contract, then remove this paragraph.]

[2.) For Repeated Services Over a Period of Time/Term (without renewal options), use the following:]

In performing the services described in this Contract, it is mutually agreed that time is of the essence. The Contract shall have a term of _____ **[written number (X) – example: five (5)]** years, beginning on the Effective Date through and including **[enter term end date]**.

[3.) For Repeated Services Over a Period of Time/Term (with Renewal Options), use the following:]

In performing the services described in this Contract, it is mutually agreed that time is of the essence. The Contract shall have an initial term of _____ years, beginning on the Effective Date through and including **[enter initial term end date]**.

Prior to the expiration of the initial term or any subsequent renewal terms, the City shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions as are set forth herein for up to a total of _____ additional one-year terms, for a maximum contract term not to exceed five (5) years. The City shall exercise each such renewal option no later than _____ days before the end of the Contract's then-current term.

The parties acknowledge and agree that a written notice exercising one of the City's renewal options that is sent to the Contractor as an attachment to an e-mail (for example, as a PDF of a letter sent as an attachment to an e-mail), and which

written notice does not contain an original, wet signature or a digital signature, shall nonetheless have the same force and effect as if such written notice contained an original, wet signature or digital signature.

Once the City has decided to exercise a renewal option as provided in this Section, the City hereby authorizes the director of the City department that is responsible for administering this Contract on behalf of the City to execute on behalf of the City the written notice to Contractor that so exercises one of the City's renewal option(s), and the Contractor shall accept such written notice as the City's exercise of the applicable renewal option. Notwithstanding anything herein to the contrary, for purposes of providing written notice of the City's exercise of a renewal option as set forth herein, the parties acknowledge and agree that the City shall submit such written notice to Contractor by e-mail, to the attention of the Contractor representative specified in Section 4 below, "Notices".

The Contractor shall be responsible for immediately notifying the City in writing of any changes to its contact information in Section 5, "Notices". The City's inability to deliver to Contractor written notice of the City's exercise of a renewal option because Contractor has failed to keep the City informed of any changes to its contact information in Section 5, below, shall not negate the effectiveness or validity of the City's exercise of any such renewal option if written notice of the same has been timely submitted by the City to the last-known email address that the City has for the Contractor's representative pursuant to Section 5, below.

3. Compensation; Time of Payment

For services to be performed hereunder, the City shall pay the Contractor a not to exceed total contract amount \$ (\$ for the initial term and \$ for each renewal term if exercised by the City), unless changed by a duly authorized amendment.

[if using option 3 in the Time of Performance section above, enter the total contract amount followed by the sub-total amounts of the initial term and the amount of the renewal options]

[if not using option 3 in the Time of Performance section above, delete the statement in the parenthesis () with the sub-total amounts if the contract doesn't include optional renewal terms]

- 3.1. The standard City of Raleigh payment term is NET 30 days from the date of invoice.
- 3.2. Send all invoices electronically by email accountspayable@raleighnc.gov (or send by mail to: City of Raleigh, Accounts Payable, PO Box 590, Raleigh, North Carolina 27602-0590).
- 3.3. All invoices must include the following Purchase Order Number _____. Invoices submitted without the correct purchase order number will result in delayed payment.

4. Workmanship and Quality of Services

All work performed under this Contract shall be performed as described in the Scope of Services, above, and in a workmanlike and professional manner, all to the reasonable satisfaction of the City, and shall conform to all prevailing industry and professional standards.

5. Notices

Except as otherwise expressly provided in this Contract, all notices, requests for payment, or other communications arising hereunder shall be sent to the following:

City of Raleigh

Attn:
Title:
Address 1: P.O. Box 590
Address 2: Raleigh, NC 27602
Telephone:
E-mail:

Contractor

Attn:
Title:
Address 1:
Address 2:
Telephone:
E-mail:

6. Non-Discrimination

- 6.1. To the extent permitted by North Carolina law, the Parties for themselves, their agents, officials, directors, officers, members, representatives, employees, and contractors agree not to discriminate in any manner or in any form based on actual or perceived age, mental or physical disability, sex, religion, creed, race, color, sexual orientation, gender identity or expression, familial or marital status, economic status, veteran status or national origin in connection with this Contract or its performance.
- 6.2. The Parties agree to conform with the provisions and intent of Raleigh City Code §4-1004 in all matters related to this Contract. This provision is incorporated into the Contract for the benefit of the City of Raleigh and its residents and may be enforced by an action for specific performance, injunctive relief, or any other remedy available at law or equity. This section shall be binding on the successors and assigns of all parties with reference to the subject matter of the Contract.

7. Assignment

This Contract may not be assigned without the express written consent of the City.

8. Applicable Law

Both the City and the Contractor, for themselves and their respective agents, officials, employees, and servants, hereby acknowledge and agree that this Contract shall be governed and construed in accordance with the applicable laws of the State of North Carolina, without regard to its choice of law provisions, and no other.

The proper, sole, and exclusive venue for any civil action arising out of or in any way related to this Contract shall be the federal or state courts sitting in Wake County, North Carolina.

9. Insurance

Contractor agrees to maintain, on a primary basis and at its sole expense, at all times during the life of this Contract the following coverages and limits. The requirements contained herein, as well as City's review or acceptance of insurance maintained by Contractor is not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by Contractor under this Contract.

9.1. Commercial General Liability:

Combined single limit of no less than \$1,000,000 each occurrence and \$2,000,000 aggregate. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability or Cross Liability.

9.2. Automobile Liability:

Limits of no less than \$1,000,000 Combined Single Limit. Coverage shall include liability for Owned, Non-Owned and Hired automobiles. In the event Contractor does not own automobiles, Contractor agrees to maintain coverage for Hired and Non-Owned Auto Liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Auto Liability policy. Automobile coverage is only necessary if vehicles are used in the provision of services under this Contract and/or are brought on a COR site.

9.3. Worker's Compensation & Employers Liability:

Contractor agrees to maintain Worker's Compensation Insurance in accordance with North Carolina General Statute Chapter 97 with statutory limits and employees liability of no less than \$1,000,000 each accident.

9.4. Additional Insured:

Contractor agrees to endorse the City as an Additional insured on the Commercial General Liability, Auto Liability and Umbrella Liability if being used to meet the standard of the General Liability and Automobile Liability. The Additional Insured shall read "City of Raleigh is named additional insured as their interest may appear".

9.5. Certificate of Insurance:

Contractor agrees to provide COR a Certificate of Insurance evidencing that all coverages, limits and endorsements required herein are maintained and in full force and effect, and Certificates of Insurance shall provide a minimum thirty (30) day endeavor to notify, when available, by Contractor's insurer.

If Contractor receives a non-renewal or cancellation notice from an insurance carrier affording coverage required herein, or receives notice that coverage no longer complies with the insurance requirements herein, Contractor agrees to notify the City within five (5) business days with a copy of the non-renewal or cancellation notice, or written specifics as to which coverage is no longer in compliance.

The Certificate Holder address should read:

City of Raleigh

Post Office Box 590

Raleigh, NC 27602-0590

9.6. Umbrella or Excess Liability:

Contractor may satisfy the minimum liability limits required above under an Umbrella or Excess Liability policy. There is no minimum Per Occurrence limit of liability under the Umbrella or Excess Liability, however, the Annual Aggregate limits shall not be less than the highest 'Each Occurrence' limit for required policies. Contractor agrees to endorse City of Raleigh as an 'Additional Insured' on the Umbrella or Excess Liability, unless the Certificate of Insurance states the Umbrella or Excess Liability provides coverage on a 'Follow-Form' basis.

9.7. Professional Liability:

Limits of no less than \$1,000,000 each claim. This coverage is only necessary for professional services such as engineering, architecture or when otherwise required by the City.

- 9.8. All insurance companies must be authorized to do business in North Carolina and be acceptable to the City of Raleigh's Risk Manager or his/her designee.

10. Indemnity

Except to the extent caused by the sole negligence or willful misconduct of the City, the Contractor shall indemnify and hold and save the City, its officers, agents and employees, harmless from liability of any kind, including all claims, costs (including defense) and losses accruing or resulting to any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this Contract, and from any and all claims, costs (including defense) and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the Contractor in the performance of this Contract. This representation and warranty shall survive the termination or expiration of this Contract.

The Contractor shall indemnify and hold and save the City, its officers, agents and employees, harmless from liability of any kind, including claims, costs (including defense) and expenses, on account of any copyrighted material, patented or unpatented invention, articles, device or appliance manufactured or used in the performance of this Contract.

11. Intellectual Property

Any information, data, instruments, documents, studies, reports, or deliverables given to, exposed to, or prepared or assembled by the Contractor under this Contract shall be kept as confidential proprietary information of the City and not divulged or made available to any individual or organization without the prior written approval of the City. Such information, data, instruments, documents, studies, reports or deliverables will be the sole property of the City and not the Contractor.

- 11.1. All intellectual property, including, but not limited to, patentable inventions, patentable plans, copyrightable works, mask works, trademarks, service marks and trade secrets invented, developed, created, or discovered in performance of this Contract shall be the property of the City.
- 11.2. Copyright in and to any copyrightable work, including, but not limited to, copy, art, negatives, photographs, designs, text, software, or documentation created as part of the Contractor's performance of this project shall vest in the City. Works of authorship and contributions to works of authorship created by the Contractor's performance of this project are hereby agreed to be 'works made for hire' within the meaning of 17 U.S.C. 201.

12. Communications

If communications to the public and/or City employees are required as part of the Contractor's scope of work under this Contract, then the Contractor shall work with the City in the development of a communications plan ("Communications Plan") that must first be approved by the City in writing before any such communications are delivered to the public and/or City employees.

For purposes of this Section 13, such written approval by the City shall be provided by electronic mail by the applicable City Communications Department employee who is responsible for reviewing and approving the Communications Plan, such electronic mail to be sent to the electronic mail address listed in Section 5, above, as part of the contact information for the Contractor representative identified in Section 5, above.

Among other things, the Communications Plan must establish whether the City or the Contractor will be responsible for sending any such communications to the public and/or City employees as required either by this Contract or the Communications Plan. The Communications Plan also shall include, but not be limited to, communications objectives, target audience, and deliverables (print, video, website, social, direct, or digital). The Contractor shall comply with the Communications Plan when communicating to the public and/or City employees pursuant to this Contract and the Communications Plan. All such communications shall comply with the City's brand and communications guidelines, as the same may be amended or modified from time to time.

The City's current brand and communications guidelines are incorporated into this Contract by reference and can be found on the City's website here: <https://raleighnc.gov/doing-business/city-brand-guidance-vendors>.

For purposes of this Section 13, "Communications" is defined as any public or City employee facing information presented in channels such as, but not limited to, a website, mobile applications, social media, printed materials, vehicles, billboards, and videos.

12.1. Communications Plan Approval:

Any materials, messaging or outreach from the Contractor related to marketing and communications of any service or effort under this Contract must first be reviewed and approved by the City's Communications Department. This is to ensure that the Communications Plan: (i) complies with the City's brand and communication guidelines; (ii) integrates with the City's other communications channels and digital strategy; (iii) meets accessibility guidelines; and (iv) conforms to communications best practices with respect to general user experience.

12.2. Accessibility Requirements:

For web content that the Contractor is to make accessible to the public and/or City employees as part of an approved Communications Plan that is included in the Contractor's scope of work under this Contract, all web materials including, but not limited to, tools, mobile applications, and websites, generated by, or on behalf of, the Contractor must meet at least the mid-range conformance level, AA compliance of the current Web Content Accessibility Guidelines, as the same may be amended from time to time.

Any such web content generated by, or on behalf of the Contractor, as part of a Communications Plan associated with this Contract shall meet all standards of good cognitive web accessibility, which include the following:

- 12.2.1. Using proper headings and lists
- 12.2.2. Using unique links
- 12.2.3. Using alternative text and captions
- 12.2.4. Using more white space
- 12.2.5. Dividing content into more manageable pieces
- 12.2.6. Making forms manageable by breaking them into multiple, sequential steps
- 12.2.7. Providing a logical reading order
- 12.2.8. Being consistent with fonts, colors and locations of page elements
- 12.2.9. Offering keyboard access
- 12.2.10. Offering content in multiple formats
- 12.2.11. Understanding minimum contrast

12.3. Languages:

Digital sites/ tools that are for public use/consumption, including for use by City employees, under a Communications Plan associated with this Contract must have translation module (e.g., G-translate, Weglot) so that the service is available in all languages. At minimum, Spanish translation is required on all such digital sites/tools based on low English proficiency requirements:

- 12.3.1. In most cases, entities that are recipients of federal financial assistance through U.S. Department of Health and Human Services (HHS) must provide language assistance services in order to comply with their legal obligation to take reasonable steps to ensure meaningful access to their programs by persons with Limited English Proficiency (LEP).

12.4. Content:

For any communications content that the Contractor is required to generate, or have generated, as part of its scope of work under this Contract, the Contractor shall send such content to City Communications Department staff in raw, high-resolution format for inclusion in communications materials to be made accessible to the public and/or City employees as set forth in the Communications Plan that arises from this Contract (i.e., websites, mobile applications, printed materials collateral, and social media). PDF attachments shall be used only as a last resort and only after written approval by the City, with such written approval to be provided by the City in electronic mail format as described elsewhere in this Section 13.

- 12.4.1. Contractor shall only provide to the City communications materials for which the City has rights to use, with written documentation of such use rights being provided to the City as requested from time to time by the City in its sole discretion.
- 12.4.2. All working files agreed upon for the specific Communications Plan shall be provided to the City Communications Department, i.e., text, graphics, charts and data, infographics, and original native files such as Illustrator, Excel, ArcGIS, etc. Following are the file format specifications:
 - 12.4.2.1. Images: At least 300dpi for printing at actual size; 96dpi and at least 1920x1080px for digital/Web.
 - 12.4.2.2. Video: Any video should be no less than Standard HD (1920x1080) but preferable 4k.
 - 12.4.2.3. Text: Word document using accessibility best practices (heading structure, table of contents, and tables).

13. Advertising

The Contractor shall not use the existence of this Contract, or the name of the City of Raleigh, as part of any advertising without the prior written approval of the City.

14. Acknowledgement of City Brand and Tree Logo Ownership and Restrictions

The City of Raleigh has developed proprietary branding (the "City Brand") centered around the Raleigh tree mark logo (the "Tree Logo"). The City's exclusive rights and ownership in and to the Tree Logo are protected under trademark and copyright, including U.S. Copyright Reg. No. VAu1-322-896, N.C. State Trademark Registration Reg. No. T-23070 and Federal Trademark Registration Reg. No. 5,629,347, as well as under other federal and state laws.

Contractor acknowledges and understands that the City is not conferring any license to Contractor under this Agreement to use or depict the Tree Logo or other aspects of the City Brand. Contractor shall not make any use or depiction of the Tree Logo or other aspects of the City Brand without the prior express written approval of the City. In this regard, should any materials being produced by Contractor for the City under this Agreement contemplate use or depiction of the Tree Logo, including, but not limited to, printed materials, digital media, signage and/or display materials, Contractor shall proceed under the auspices and direction of the City's Communications Department and shall comply with all guidelines and restrictions governing use or depiction of the Tree Logo.

15. Force Majeure

Except as otherwise provided in any environmental laws, rules, regulations, or ordinances applicable to the parties and the services performed under this Contract, neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations by an act of war, hostile foreign actions, nuclear explosion, earthquake, hurricane, tornado, or other catastrophic natural event or act of God. Either party to the Contract must take reasonable measures and implement reasonable protections when a weather event otherwise defined as a force majeure event is forecast to be eligible to be excused from the performance otherwise required under this Contract by this provision.

16. Cancellation

- 16.1. The City may terminate this Contract at any time by providing thirty (30) days written notice to the Contractor. In addition, if Contractor shall fail to fulfill in timely and proper manner the obligations under this Contract for any reason, including the voluntary or involuntary declaration of bankruptcy, the City shall have the right to terminate this Contract by giving written notice to the Contractor and termination will be effective upon receipt. Contractor shall cease performance immediately upon receipt of such notice.
- 16.2. In the event of early termination, Contractor shall be entitled to receive just and equitable compensation for costs incurred prior to receipt of notice of termination and for the satisfactory work completed as of the date of termination and delivered to the City. Notwithstanding the foregoing, in no event will the total amount due to Contractor under this section exceed the total amount due Contractor under this Contract. The Contractor shall not be relieved of liability to the City for damages sustained by the City by virtue of any breach of this Contract, and the City may withhold any payment due to the Contractor for the purpose of setoff until such time as the City can determine the exact amount of damages due the City because of the breach.
- 16.3. Payment (obligation) of compensation specified in this Contract, its continuation or any renewal thereof, is dependent upon and subject to the allocation or appropriation of funds to the City for the purpose set forth in this Contract.

17. Laws/Safety Standards

The Contractor shall comply with all laws, ordinances, codes, rules, regulations, safety standards and licensing requirements that are applicable to the conduct of its business, including those of Federal, State, and local agencies having jurisdiction and/or authority.

- 17.1. Contractor must comply with North Carolina Occupational Safety and Health Standards for General Industry 13 NCAC 07F (29CFR 1910). In addition, Contractor shall comply with all applicable occupational health and safety and environmental rules and regulations.
- 17.2. All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re examination listing or identification marking of the appropriate safety standard organization, such as the American Society of Mechanical Electrical Engineers for pressure vessels; the Underwriters' Laboratories and/or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type(s) of devices offered and furnished. Further, all items furnished by the Contractor shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.
- 17.3. Contractor shall effectively manage their safety and health responsibilities including:
 - 17.3.1. Accident Prevention:
Prevent injuries and illnesses to their employees and others on or near their job site. Contractor managers and supervisors shall ensure personnel safety by strict adherence to established safety rules and procedures.
 - 17.3.2. Environmental Protection:
Protect the environment on, near, and around their work site by compliance with all applicable environmental regulations.

17.3.3. Employee Education and Training:

Provide education and training to all contractors employees before they are exposed to potential workplace or other hazards as required by specific OSHA Standards.

18. Applicability of North Carolina Public Records Law

Notwithstanding any other provisions of this Contract, this Contract and all materials submitted to the City by the Contractor are subject to the public records laws of the State of North Carolina and it is the responsibility of the Contractor to properly designate materials that may be protected from disclosure as trade secrets under North Carolina law as such and in the form required by law prior to the submission of such materials to the City. Contractor understands and agrees that the City may take any and all actions necessary to comply with federal, state, and local laws and/or judicial orders and such actions will not constitute a breach of the terms of this Contract. To the extent that any other provisions of this Contract conflict with this paragraph, the provisions of this section shall control.

19. Miscellaneous

- 19.1. The Contractor shall be responsible for the proper custody and care of any property furnished or purchased by the City for use in connection with the performance of this Contract and will reimburse the City for the replacement value of its loss or damage.
- 19.2. The Contractor shall be considered to be an Independent Contractor and as such shall be wholly responsible for the work to be performed and for the supervision of its employees. Nothing herein is intended or will be construed to establish any agency, partnership, or joint venture. Contractor represents that it has, or will secure at its own expense, all personnel required in performing the services under this Contract. Such employees shall not be employees of or have any individual contractual relationship with the City.
- 19.3. This Contract may be amended only by written agreement of the parties executed by their authorized representatives.

20. Right to Audit and Access to Records

- 20.1. The City may conduct an audit of any services performed and fees paid subject to this Contract. The City, or its designee, may perform such an audit throughout the contract period and for three (3) years after termination thereof or longer if otherwise required by law.
- 20.2. The Contractor and its agents shall maintain all books, documents, papers, accounting records, contract records and such other evidence as may be appropriate to substantiate costs incurred under this Contract. The City, or its designee, shall have the right to, including but not limited to: review and copy records; interview current and former employees; conduct such other investigation to verify compliance with contract terms; and conduct such other investigation to substantiate costs incurred by this Contract.
- 20.3. "Records" shall be defined as data of every kind and character, including but not limited to books, documents, papers, accounting records, contract documents, information, and materials that, in the City's sole discretion, relate to matters, rights, duties or obligations of this Contract.
- 20.4. Records and employees shall be available during normal business hours upon advanced written notice. Electronic mail shall constitute written notice for purposes of this section.
- 20.5. Contractor shall provide the City or its designee reasonable access to facilities and adequate and appropriate workspace for the conduct of audits.
- 20.6. The rights established under this section shall survive the termination of the Contract, and shall not be deleted, circumvented, limited, confined, or restricted by contract or any other section, clause, addendum, attachment, or the subsequent amendment of this Contract.
- 20.7. The Contractor shall reimburse the City for any overcharges identified by the audit within ninety (90) days of written notice of the City's findings.
- 20.8. Contractor shall, upon request, provide any records associated with this engagement to the North Carolina State Auditor that are necessary to comply with the provisions of G.S. § 147-64.7.

21. E – Verify

Contractor shall comply with E-Verify, the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law and as in accordance with N.C.G.S. §64-25 et seq. In addition, to the best of Contractor's knowledge, any subcontractor employed by Contractor as a part of this contract shall be in compliance with the requirements of E-Verify and N.C.G.S. §64-25 et seq.

22. Iran Divestment Act Certification

Contractor certifies that, as of the date listed below, it is not on the Final Divestment List as created by the State Treasurer pursuant to N.C.G.S. § 147-86.55, et seq. In compliance with the requirements of the Iran Divestment Act and N.C.G.S. §

147-86.59, Contractor shall not utilize in the performance of the contract any subcontractor that is identified on the Final Divestment List.

23. Companies Boycotting Israel Divestment Act Certification

Contractor certifies that it has not been designated by the North Carolina State Treasurer as a company engaged in the boycott of Israel pursuant to N.C.G.S. 147-86.81.

24. Incorporation of Documents/Complete Agreement

This Contract, and any documents incorporated below, represent the entire Contract between the parties and suspend all prior oral or written statements, agreements or contracts.

Specifically incorporated into this Contract are the following attachments, or if not physically attached, are incorporated fully herein by reference:

-

In cases of conflict between this Contract and any of the above incorporated attachments or references, the terms of this Contract shall prevail.

The remainder of this page remains blank intentionally.

IN WITNESS WHEREOF, the parties hereto have executed this Contract by digital signature, under seal, on the respective dates below, and this Contract shall be effective upon the date of the City’s signature (the “Effective Date”).

CONTRACTOR:

By:

_____(SEAL)
Signature

Name

Title

Date of Signature

ATTEST:

Signature

Name

Title

City of Raleigh Contract Number xxxxxxxxxx

CITY:

CITY OF RALEIGH
a North Carolina municipal corporation

By:

Signature

Name

Title

Department

Date of Signature

ATTEST:

_____(SEAL)
City Clerk (or designee)

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Chief Financial Officer (or designee)

APPENDIX V

Presentations

As part of the evaluation process, System Integrator (SI) vendors will be requested to conduct a presentation showcasing their implementation methodology, delivery capabilities including key personnel, governance approach, and experience delivering ERP transformations. The purpose of the presentation is to assess the vendor's ability to successfully plan, implement, deploy, and support the proposed ERP solution while mitigating project risk and driving business outcomes.

Ensure the presentation addresses the topics and scenarios outlined below and reflects the proven approach to planning, deploying, and optimizing the ERP platform, drawing upon lessons learned, accelerators, best practices, and examples from prior engagements with the selected ERP vendor.

	Topic / Sub-topic	Additional details
1	Introduction and Executive Summary	• Introduce Key Personnel • Overview of Proposal Components
3	Scope of Proposal and Strategy	• ERP Implementation Strategy and Timeline • Governance and Team Structure • Day in the Life for Business Process Leads • Data Cleansing and Migration strategy • Integration, architecture and third-party connectivity • BI, Reporting, Analytics • QA and Testing practices • Key Assumptions and Risks • Questions and Answers
3	Methodology, Tools and Accelerators	• Highlight items not covered in the prior section or emphasize key accelerators / approaches mentioned earlier.
4	Proposed Timeline, Deployment Schedule, Deployment Strategy, and Staffing Plan	• Include Cutover planning, go-live readiness, and hyper care support
5	Organization Change Management Approach	• Organizational Change Management (OCM), communications, and training approach • Knowledge Transfer approach
6	Case Study and Wrap Up	• Include Relevant implementation experience and lessons learned from comparable ERP projects