

TOWN of CLAYTON

North Carolina



REQUEST FOR PROPOSALS

**Consulting Services for Enterprise Resource Planning (ERP) System Project Planning,
and Development of a Request for Proposal.**

Request for Proposal: 700-FIN-2025-14

Issue Date: 5/28/2025

Due Date: 6/24/2025

Issuing Department: Finance

Direct all inquiries concerning this RFP to: smizell@townofclaytonnc.org

1 REQUEST FOR PROPOSALS

Introduction

The Town of Clayton, located in Johnston County, North Carolina, is one of the fastest-growing municipalities in the region, with a population exceeding 30,000. As the Town continues to expand in both size and complexity, the need for more modern, integrated, and efficient technology systems has become a strategic priority.

Purpose and Background

The Town of Clayton is soliciting proposals from qualified and experienced consultants to assist in the development of a Request for Proposals (RFP) with the option to utilize the consultant for the vendor selection process, contract negotiations, and implementation advisory services for a new Enterprise Resource Planning (ERP) system. This initiative is part of the Town's strategic efforts to modernize its core business processes and improve service delivery across departments. The selected consultant will work closely with Town staff to assess current systems, gather business and technical requirements, engage stakeholders, and draft a comprehensive and competitive RFP for the procurement of an ERP system including the options above, who can provide guidance that aligns with the best practices and the Town's long-term operational goals.

Current ERP (Tyler Technologies New World System) consist of the modules below:

Financial Management

- Journals
- Revenue Collections
- Payment Purchasing
- Annual Budget Processing
- Year-End Processing
- Receipt of Goods
- Accounts Payable
- Procurement
- Bank Reconciliation
- Project Accounting
- Grant Management
- Asset Management
- Miscellaneous Billing
- Reports
- Inquiries
- Human Resources
- Utility Management
- Payroll
- Community Development

RFP Response Timeline

The RFP process shall adhere to the following schedule:

RFP Process	Date and time	
RFP posted to NC eVP website	5/28/2025	N/A
Proposers Written Questions Due	6/11/2025	4:00 PM
Town Responses (addendum) to Proposers questions posted on NC eVP	6/13/2025	N/A
Proposal Submission Deadline	6/24/2025	4:00 PM

Note: All times shown as Eastern Time (ET).

Proposal Questions

Upon review of the Scope of Work, Parties may submit any questions to clarify in order to submit the best RFP possible. To accommodate the Proposal Questions process, Proposers shall submit any such questions by Date and Time in the timeline (no exceptions). The Town will not entertain any further questions after the due date and time. Written questions shall be emailed to smizell@townofclaytonnc.org. Proposers must enter "**RFP #700-FIN-2025-14: Questions**" as the subject for the email.

Questions received prior to the submission deadline (date and time), will be answered by the Town and posted in the form of an addenda to the North Carolina eVP website and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any Town personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Proposers shall rely **only** on written material contained in an Addendum to this RFP.

It is the Proposer's responsibility to assure that all addendum(s) have been reviewed signed and returned with the RFP. Failure to sign and include the addendum(s) with your RFP will result in your response being rejected.

Proposal Submission Instructions

Proposals must be submitted in a PDF format via email to: smizell@townofclaytonnc.org Proposals emailed after the due date will be rejected. The proposals must be no more than 30 pages. The Town reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest. Proposers must respond to the entire Request for Proposals (RFP). Any proposals received by the Town that are incomplete in their responses will be rejected.

NOTE: **Include All Task in your proposal.**

Rights to Submitted Material

All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and other documentation submitted by Proposers (other than materials submitted as and qualifying as trade secrets under North Carolina law) shall become the property of the Town when received and the entire proposal shall be subject to the public records laws of the State of North Carolina except where a proper trade secrets exception has been made by the Proposer in accordance with the procedures allowed by North Carolina law.

The Town reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Proposer of the conditions contained in this Request for Proposal.

2 PROPOSALS

Responses must follow the format outlined herein. The Town may reject as non-responsive at its sole discretion any proposal or any part thereof that is incomplete, inadequate in its response, or diverts in any substantive way from the required format. Proposal responses shall be organized in the following manner:

1: COVER LETTER/LETTER OF INTENT (0 points)

A letter, signed by an individual authorized to bind the firm, indicating the firm's interest in the project and its ability to meet the requirements set forth in this RFP. The letter should briefly summarize the firm's understanding of the project, confirm the availability of key personnel, and express commitment to the proposed timeline.

2: CORPORATE BACKGROUND (10 points)

Provide a general overview of the firm, including:

- Legal name, address, and primary contact information
- Year established and type of business entity
- Office location responsible for project delivery
- Description of the firm's primary services
- Relevant certifications and professional affiliations

3: RELEVANT EXPERIENCE (20 points)

Describe the firm's experience with ERP consulting services, particularly for local governments or public agencies. Include:

- A summary of at least three (3) similar ERP projects completed within the last five (5) years with Name of Government Entity; Contact person's name, title, phone number and email address
- Description of services performed and project outcomes

4: PROJECT UNDERSTANDING AND APPROACH (25 points)

Provide a narrative that demonstrates the proposer's understanding of the project, its objectives, and the Town's specific ERP consulting needs. Discuss key issues, challenges, and opportunities that the project may present. Describe the proposed approach to completing the scope of services. (Include)

- Methodology and project phases
- Tools, techniques and deliverables
- Justification for the approach
- Tell why your firm is well-suited for this project

5: TIMELINE AND WORKPLAN (20 points)

Provide a proposed timeline, including:

- Milestones and deliverables
- Estimated start and completion dates
- Duration of each project phase

6: TEAM ORGANIZATION AND RESUMES (10 points)

Identify all key personnel assigned to the project. Include:

- Organization chart indicating roles and responsibilities
- Resumes for each key team member
- Relevant experience, certifications and project experience

7: COST PROPOSAL (15 points)

Submit a detailed cost proposal that includes:

- Breakdown of costs by task or deliverable
- Hourly rates and estimated hours for each team member
- Any anticipated travel or reimbursable expenses
- Total not-to-exceed amount for the entire project

3 Evaluation Process

The Town of Clayton will conduct a comprehensive, fair, and impartial evaluation of all proposals submitted in response to this Request for Proposals (RFP). The purpose of the evaluation process is to identify the proposal that best meets the needs of the Town and demonstrates the ability to deliver expert ERP consulting services within scope, budget, and timeline.

1. Evaluation Committee

An Evaluation Committee composed of representatives from the Town’s Staff will review and evaluate all proposals. The committee may also include subject matter experts as deemed necessary.

2. Initial Review

All proposals will be initially reviewed by the Procurement Division to ensure compliance with the mandatory submission requirements, including format, deadlines, and inclusion of all required documents. Proposals that do not meet these basic requirements may be deemed non-responsive and excluded from further consideration.

3. Evaluation Criteria

Responsive proposals will be evaluated based on the criteria and points in **Section 2** above. There will be a maximum of 100 points.

4. Interviews and Presentations (If Applicable)

Short-listed firms may be invited to participate in interviews and/or provide presentations to the Evaluation Committee. This step allows the Town to ask clarifying questions, validate proposal contents, and further assess the consultants’ knowledge, approach, and communication skills.

5. Best and Final Offer (BAFO)

If deemed necessary, the Town may request a Best and Final Offer (BAFO) from one or more respondents. This may include updated pricing, clarification of services, or modified scopes based on discussion outcomes.

6. Final Selection

The Evaluation Committee will make a final recommendation to the Town's Executive Team based on the total evaluation score, considering the best value to the Town, not necessarily the lowest cost. The selected proposer will be invited to enter into contract negotiations.

7. Town Council Approval (If Applicable)

Depending on the contract value and the Town's protocol, final award and contract execution may require approval by the Clayton Town Council.

8. Right to Reject Proposals

The Town reserves the right to reject any or all proposals, waive informalities and minor irregularities in proposals received, and to accept any proposal deemed to be in the best interest of the Town.

4 SCOPE OF SERVICES

TASK 1 - PROJECT PLANNING AND MANAGEMENT

The consultant will establish a solid project structure to ensure alignment, accountability, and progress throughout the engagement.

- Develop and present a comprehensive project plan with clear milestones, deliverables, and timelines.
- Establish a governance structure including a project steering committee and working groups.
- Define project roles and responsibilities, including Town and consultant team members.
- Facilitate regular check-ins, progress updates, and steering committee meetings.
- Identify project risks and provide mitigation strategies.
- Provide project documentation and reporting.

Deliverable: Needs Assessment & Business Process Analysis Report (including gap analysis)

TASK 2 - DEVELOP A PLAN OF ACTION

Based on the assessment of needs, the consultant will develop a clear and actionable roadmap.

- Prioritize business and technical needs.
- Recommend process improvements and system integration opportunities.
- Define a phased implementation approach if needed.
- Provide organizational readiness and change management recommendations.
- Estimate budget, timeline, and staffing/resource requirements.

Deliverable: ERP Strategic Roadmap & Implementation Plan

TASK 3 - DEVELOP REQUEST FOR PROPOSAL (RFP) FOR ERP SOFTWARE

The consultant will lead the drafting of an ERP RFP tailored to the Town's needs.

- Translate process requirements and technical specifications into an RFP format.
- Include project background, scope, functional and technical specifications, vendor qualifications, implementation requirements, and submission criteria.
- Ensure RFP complies with NC public procurement laws and Town policies.
- Work with Procurement to finalize and release the RFP.

Deliverable: Complete ERP Software RFP Document

TASK 4 - IDENTIFY EVALUATION CRITERIA

The consultant will assist the Town in creating a fair, transparent, and valid evaluation criteria.

- Define functional, technical, and cost-related evaluation criteria.
- Create scoring matrix with weightings aligned with Town priorities
- Develop tools for initial proposal evaluation and vendor demonstration scoring.
- Establish protocols for reference checks and site visits.

Deliverable: Evaluation Criteria Matrix & Vendor Evaluation Process

TASK 5 - SELECTION OF VENDOR

The consultant will support the full vendor selection process.

- Assist with vendor communications, Q&A, and proposal review coordination.
- Facilitate vendor demos and support evaluators with guided analysis.
- Conduct reference checks and advise on vendor viability.
- Lead consensus scoring discussions and selection justification.

Deliverable: Vendor Selection Report with Scoring Summary & Recommendation.

TASK 6 - CONTRACT NEGOTIATIONS WITH SELECTED FIRM

The consultant will assist the Town in achieving favorable contract terms.

- Review and advise on the draft contract, terms of service, and service level agreements.
- Support negotiation of licensing, implementation, maintenance, and support pricing.
- Advise on deliverable timelines, milestones, penalties, and warranty provisions.
- Ensure contract reflects the scope of services and the Town's legal and procurement requirements.

Deliverable: Final negotiated contract and supporting documentation.

TASK 7 - IMPLEMENTATION ADVISORY SERVICES

The consultant will serve in an advisory capacity during the early stages of ERP implementation.

- Provide guidance and oversight on project planning and kickoff activities.
- Assist with data migration strategy, testing protocols, and user training planning.
- Monitor vendor adherence to timeline and deliverables.
- Advise on Town-side project team readiness and internal communications.
- Support issue resolution, change requests, and quality assurance.

Deliverable: Implementation Oversight Reports & Post-Implementation Readiness Checklist

GENERAL CONSULTANT RESPONSIBILITIES

- Maintain regular communication with the Towns Project Manager and leadership.
- Provide timely and professional deliverables in agreed formats.
- Ensure confidentiality, neutrality, and objectivity throughout the process.

5 EXECUTION OF PROPOSAL

By submitting this proposal, the potential contractor certifies the following:

- This proposal is signed by an authorized representative of the firm.
- All costs and availability associated with performing the services described herein have been determined and included in the proposed cost.
- The potential contractor has read and understands the conditions set forth in this RFP any addenda and agrees to them with no exceptions.

By: _____
(Signature)

Name: _____
(Printed)

Title: _____

Date _____