

TOWN OF PALM BEACH

Information for Town Council Meeting on: August 13, 2024

TO: Mayor and Town Council

VIA: Kirk W. Blouin, Town Manager

VIA: Robert Miracle, CPA Deputy Town Manager, Finance and Administration

FROM: Dean Mealy, II NIGP-CPP, CPPO Town Procurement and Contract Manager

RE: Resolution No. 093-2024, approving a Purchase Order to Government Finance Officers Association (GFOA) for Enterprise Resource Planning (ERP) Implementation Advisory Services in a not-to-exceed amount of \$151,250

DATE: July 31, 2024

STAFF RECOMMENDATION

Staff recommends the Town Council approve Resolution No. 093-2024, approving a Purchase Order to GFOA for ERP Implementation Advisory Services in a not-to-exceed amount of \$151,250.

SUMMARY EXPLANATION/BACKGROUND

The Town engaged Tyler Eden for an ERP solution in 2006 followed by implementation in 2007. Tyler Technologies has advised the Town our current ERP solution has a sunset date of March 1, 2027, and their goal is to have all clients migrated to a third party by the end of 2026.

ERP (enterprise resource planning) software is a business management system that integrates internal and external management information across an entire organization. It typically includes modules related to finance, human resources, procurement, inventory, and operations.

ERP systems are designed to enable organizations to optimize their processes, increase their awareness and connect them with customers, vendors, and partners. DCAA compliant ERP systems provide real-time insight into data enabling companies to make strategic decisions with accurate real time information.

The Government Finance Officers Association (GFOA) is a 501(c)3 non-profit association with 22,500 members representing nearly 10,000 local governments. As one of the premier membership associations for public-sector professionals, GFOA can offer independent, objective, and best practice focused consulting services consistent with our mission to improve government management. Over 600 governments, including many in Florida, have found value in their experience, expertise, and detailed approach to ERP projects.

In November 2023, the Town engaged GFOA for a review of the technical nature of reviewing current business processes, modeling best practices, development of a RFP scope and the engagement for negotiations. During the past eight months, GFOA has engaged the Process Improvement Teams (PIT) and the Steering Committee for current state mapping, future state mapping and development of the scope which is part of the RFP solicitation. The Town has great success in the engagement with GFOA.

With the issuance of the RFP for the new ERP solution, the development team believes that the engagement of GFOA for ERP Implementation Advisory Services would ensure proper oversight based on their previous engagements. The implementation is the critical path as the negotiations are finalized and the requirements for oversight of the process are developed and executed. GFOA has an extensive history with implementation services and would be the Town's oversight partner to ensure the selected vendor is meeting all deliverables of the awarded solicitation.

FUNDING/FISCAL IMPACT

Funding for this contract will be from the Equipment Replacement Fund.

TOWN ATTORNEY REVIEW

This format has been utilized by the Town in previous recommendations and was approved by the Town Attorney.