

**Village of Wellington, FL - ERP System Consulting Services**  
**Village Versus Plante Moran Involvement**

Revision Date: August 18, 2016  
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Activity	Village Involvement	PM Involvement	Deliverable(s)	Hours	Fees
<b>Phase 0: Project Management</b>					
1. Project Initiation	* Participate in project planning meetings	* Participate in project planning meetings		2	\$440
2. Define Project Organizational Structure	* Work with PM in defining an appropriate project organizational structure * Assist in defining roles and responsibilities of the various project organizational components * Determine Village staff that will fulfill the various roles defined	* Work with the Village in the development of a project organizational structure * Work with the Village in identifying roles and responsibilities for the various components of the project organizational structure * Identify estimated time commitment for each of the roles on the project	Project Organizational Structure	6	\$1,320
3. Develop Project Charter	* Assist in the development of the project charter for the ERP selection phase of the project	* Work with the Village in the development of an ERP selection phase project charter	Project Charter (Selection Phase)	4	\$880
4. Develop Project Plan	* Review and approve the proposed ERP selection phase project work plan	* Develop a draft ERP selection phase project work plan that will be updated to a final form based on Village feedback * Maintain and update the selection phase project work plan	Project Plan	2	\$440
5. Establish Project Collaboration Center	* Designate a client to manage Village users in the collaboration environment	* Set-up the project collaboration environment * Train Village contact on use of the collaboration environment	Project Collaboration Center	1	\$220
6. Schedule and Moderate Project Status Meetings	* Participate in project status meetings	* Facilitate project status meetings	Meeting Agenda	16	\$3,520
<b>Phase 0 Totals:</b>				<b>31</b>	<b>\$6,820</b>
<b>Phase 1: ERP Needs Assessment</b>					
1. Review Documents	* Provide documents to PM upon request	* Request documents for review from the Village * Review requested documents	Supporting Documents	12	\$2,640
2. Assess Village's Information Technology Infrastructure	* Provide requested technical infrastructure information to PM * Determine what documentation is appropriate for inclusion in the RFP versus being of a confidential nature	* Request specific infrastructure documentation from the Village * Review provided infrastructure documentation * Gather appropriate infrastructure information into the RFP document * Identify potential risks in the technology infrastructure	Infrastructure Assessment Technical Information for the RFP	12	\$2,640
3. Conduct Departmental Interviews	* Coordinate scheduling of departmental interviews * Departments to prepare for interviews by reviewing interview questionnaire and pulling together appropriate documents requested * Departments participate in interview sessions	* Provide available time slots in which to schedule departmental interviews * Provide questionnaire and request for information to collect to departments in preparation for the interviews * Conduct the departmental interviews	Interview Schedules Departmental Interview Questionnaire Critical and Unique System Requirements and Interfaces	44	\$9,680
4. Prepare ERP Needs Assessment Report	* Review draft Report provided by PM * Provide feedback to PM to finalize	* Update draft to final	ERP Needs Assessment Report	44	\$9,680
<b>Phase 1 Totals:</b>				<b>112</b>	<b>\$24,640</b>
<b>Phase 2: ERP RFP Preparation</b>					
1. Develop Solution Selection Criteria and Define Decision-Making Process	* Work with PM in determining the overall vendor evaluation and demonstration strategy that will be used * Work with PM in the development of vendor selection criteria and weights * Work with PM in defining the decision-making process	* Provide guidance to the Village in the development of an overall vendor evaluation and demonstration strategy * Provide examples of selection criteria and weightings to consider * Finalize the selection criteria and weights to use * Finalize the decision-making process to be used	Vendor Evaluation and Demonstration Strategy Vendor Selection Criteria Decision-Making Process	6	\$1,320
2. Develop ERP Software Specifications	* Process owners to review the draft specifications provided by PM * Process owners to meet with PM to finalize base system specifications including appropriate prioritization	* Develop a base set of specifications using best practice specifications in combination with those gleaned in the interview sessions and distribute to the Village * Facilitate the process of reviewing and finalizing the base specifications	Software Specifications	48	\$10,560

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3. Develop Request for Proposal (RFP) Document	<ul style="list-style-type: none"> <li>* Review and provide feedback on the base set of Minimal Terms &amp; Conditions</li> <li>* Provide other Village boilerplate information to be included in the RFP</li> <li>* Review the other sections of the draft RFP provided by PM</li> <li>* Approve the final RFP document</li> <li>* Distribute the RFP document as deemed appropriate (posting to Village web site, mailing, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>* Prepare draft RFP document and distribute to Village for review</li> <li>* Update RFP document based on Village feedback</li> </ul>	Request for Proposal (RFP)	16	\$3,520
<b>Phase 2 Totals:</b>					<b>70 \$15,400</b>
<b>Phase 3: ERP Solution Selection</b>					
1. RFP Distribution	<ul style="list-style-type: none"> <li>* Distribute RFP</li> <li>* Establish meeting date/time for pre-bid meeting</li> <li>* Facilitate pre-bid meeting</li> <li>* Work with PM on developing appropriate RFP addenda</li> <li>* Post and/or distribute RFP addenda</li> </ul>			-	\$0
2. Manage ERP Vendor Q&A During Pre-Proposal Due Date Timeframe		<ul style="list-style-type: none"> <li>* Work with the Village in developing any RFP addenda</li> </ul>	RFP Addendum	8	\$1,760
3. Vendor Pre-Bid Meeting	<ul style="list-style-type: none"> <li>* Establish meeting date/time for pre-bid meeting</li> <li>* Facilitate pre-bid meeting</li> <li>* Determine vendors that did not meet minimum criteria and distribute appropriate communications to them identifying the reason for rejecting their bid</li> <li>* Review the appropriate bid document sections</li> <li>* Identify follow-up questions for each responding vendor and forward to PM</li> <li>* Attend vendor bid analysis meeting</li> <li>* Selection committee members to conclude on remaining vendors</li> </ul>	<ul style="list-style-type: none"> <li>* Assist in preparing for pre-bid meeting</li> </ul>		2	\$440
4. Analyze Proposals and Select Semi-Finalists		<ul style="list-style-type: none"> <li>* Review vendor responses</li> <li>* Develop proposal analysis document</li> <li>* Facilitate bid analysis meeting</li> <li>* Determine semi-finalist vendors</li> <li>* Confirm available selection committee member dates for conducting demonstrations</li> <li>* Provide guidance on development of demonstration scripts</li> <li>* Work with the Village in the development of demonstration scoring matrices</li> <li>* Provide sample demonstration agenda and finalize with Village</li> </ul>	Proposal Analysis Vendor Follow-Up Questions Semi-Finalist Vendors	50	\$11,000
5. Assist in Developing Vendor Demonstration Scripts and Other Due Diligence Templates	<ul style="list-style-type: none"> <li>* Develop vendor demonstration scripts</li> <li>* Work with PM on development of demonstration agendas</li> </ul>		Demonstration Scripts Due Diligence Guide Scoring Matrices Demonstration Agenda	12	\$2,640
6. Vendor Demonstrations	<ul style="list-style-type: none"> <li>* Determine location and reserve for vendor demonstrations</li> <li>* Schedule vendor demonstrations with vendors</li> <li>* Distribute vendor demonstration agenda and scripts to vendors</li> <li>* Communicate to staff time of vendor demonstrations</li> <li>* Provide scoring sheets to staff attending vendor demonstrations</li> <li>* Selection Committee members to attend all vendor demonstrations</li> <li>* Village to tabulate vendor demonstration results including scoring and comments</li> </ul>	<ul style="list-style-type: none"> <li>* Compile results of the vendor demonstrations</li> <li>* Conduct debriefing session after the vendor demonstrations</li> </ul>	Compiled Vendor Demonstration Results	16	\$3,520

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7. Conduct Additional Due Diligence Activities	<ul style="list-style-type: none"> <li>* Prepare and distribute questions to remaining vendors</li> <li>* Review vendor responses to questions</li> <li>* Conduct reference checking against appropriate vendor sites</li> <li>* Conduct site visits against appropriate vendor sites</li> <li>* Conduct corporate visits to finalist vendor locations</li> </ul>	<ul style="list-style-type: none"> <li>* Provide site visit and reference checking forms to the Village</li> <li>* Review responses to questions submitted to vendors</li> </ul>	Site Visit Template Reference Checking Template Vendor Response to Submitted Questions	8	\$1,760
8. Assist in the Selection of a Preferred Vendor	<ul style="list-style-type: none"> <li>* Provide due diligence results to PM for review</li> <li>* Selection committee members to score vendors in their established area of scoring</li> <li>* Selection committee members to attend meeting(s) to discuss and conclude on selected vendor</li> <li>* Work with PM in identifying other costs to be considered as part of the overall project budget including one-time and on-going operational costs</li> <li>* Present recommendation to Village Council</li> </ul>	<ul style="list-style-type: none"> <li>* Review due diligence results conducted by selection committee members</li> <li>* Attend meeting(s) with the selection committee members to discuss, score and conclude on a selected vendor</li> <li>* Work with the selection committee in identifying other costs to be considered as part of the overall project budget including one-time and on-going operational costs</li> <li>* Prepare a synopsis of the selection process for the Village Council</li> </ul>	Selected ERP Vendor Quantification of Project Costs (One-Time and On-Going) Selection Process Synopsis	24	\$5,280
<b>Phase 3 Totals:</b>				<b>120</b>	<b>\$26,400</b>
<b>Phase 4: ERP Statement of Work and Contract Negotiations</b>					
1. Conduct Contract Negotiations including Developing Statement of Work (SOW)	<ul style="list-style-type: none"> <li>* Assist in the development of the Statement of Work</li> <li>* Attend a meeting to discuss the contract negotiation strategy</li> <li>* Determine who from the Village needs to be involved in the contract negotiations</li> <li>* Identify the critical needs for inclusion in the contract</li> <li>* Determine particulars about the proposed vendor's solution that need to be considered in the negotiated contract (e.g., phasing)</li> <li>* Finalize the contract dollar amount</li> <li>* Assist in negotiating the final contract</li> <li>* Present the final contract to the appropriate committees and to the Council for approval</li> </ul>	<ul style="list-style-type: none"> <li>* Assist in development of the statement of work</li> <li>* Attend a meeting to discuss the contract negotiation strategy</li> <li>* Review finalist vendor's contract and propose recommended changes</li> <li>* Discuss particulars about the proposed vendor's solution that need to be considered in the negotiated contract (e.g., phasing)</li> <li>* Initiate negotiations with the vendor</li> <li>* Finalize the contract dollar amount</li> <li>* Assist in negotiating the final contract</li> </ul>	Statement of Work Negotiated Vendor Contracts and Pricing	60	\$13,200
<b>Phase 4 Totals:</b>				<b>60</b>	<b>\$13,200</b>

Total - 86,400.00