



# District School Board of Pasco County

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Heather Fiorentino, Superintendent

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April 5, 2011

## **MEMORANDUM**

**TO:** Honorable School Board Members

**FROM:** Kendra Goodman, CPPO, CPPB, Purchasing Agent

**SUBJECT:** **Permission to Elevate Firms for Discovery  
RFP 11-020-AZ, Software & Implementation Services for Enterprise Resource  
Planning (ERP) System**

On January 18, 2011, official action was taken to elevate four (4) firms for in-depth demonstrations (demos) of their software and implementation capabilities. These demo sessions took place over four (4) full days during consecutive weeks in February 2011. The business functions being reviewed were: General Ledger, Accounts Payable/Receivable, Purchasing, Project/Grant Accounting, Inventory Management, Budgeting, Fixed Asset/Work Order Management, Treasury, Personnel/Benefits Administration, Payroll, Applicant Tracking & Recruiting, Staff Development, Time & Attendance, Risk Management and Fleet Management. To ensure that all presenters covered the same material, for the same amount of time, the sessions were tightly scripted and moderated by our contracted consultant for the project, Government Finance Officers Association (GFOA). The sessions were attended by members of the Evaluation Committee and subject-matter experts in the above-referenced functions.

The four (4) firms were independently scored by the Evaluation Committee members on software functionality, overall system capabilities, and implementation strategies. These individual scores were averaged; Purchasing and Finance Services scored the firms' costs as presented in the original RFP, using the weighted ratio of cost methodology. Scoring results are presented in the attached tabulation. It is the consensus of the Committee that the firms rank as follows, highest to lowest: 1) Tyler Technologies (Tyler), proposing their proprietary software, 2) Cherry Road Technologies (Cherry Road), proposing Peoplesoft, 3) Oracle America (Oracle), proposing Peoplesoft, and 4) Lawson Software, proposing their proprietary software.

We request permission to elevate Tyler, Cherry Road and Oracle for the next phase of the project: in-depth discovery, site visits, and Requests for Clarification. Assistance will continue to be provided by GFOA. A recommendation regarding the preferred firm, with which we intend to negotiate a contract, will be brought to a future Board meeting for approval.

Please contact me or Arlene Zimney, Buyer, at your earliest convenience if you have any questions or concerns.

KDG/az  
Attachment

Date/Time: March 30, 2011 07:59:00

**DISTRICT SCHOOL BOARD OF PASCO COUNTY RFP TABULATION**

Demonstration dates: February 14 - March 3, 2011					
Proposal Title: Enterprise Resource Planning (ERP) System	Cherry Road Technologies, Inc.	Lawson Software	Oracle America Inc.	Tyler Technologies Inc.	
RFP 11-020-AZ Phase II: Elevate to Site Visits/Discovery	301 Yamato Rd., Ste 4199	380 St. Peter St.	1910 Oracle Way	370 US Route One	
<b>**BOARD MEETING APRIL 5, 2011**</b>	Boca Raton, FL 33431	St. Paul, MN 55102	Reston, VA 20190	Falmouth, ME 04105	<b>Recommend Elevate to Site Visits/Discovery</b>
<b>Software Functionality Core Finance (max. 25 pts.)</b>	19.02	14.42	19.02	20.44	1) Tyler Technologies
					2) Cherry Road Technologies
<b>Software Functionality Core Human Resources (max. 25 pts.)</b>	19.76	18.31	19.76	20.01	3) Oracle America
<b>Software Functionality Facilities (max. 10 pts.)</b>	8.02	2.98	8.02	8.71	4) Lawson Software
<b>Software Functionality Overall System (max. 10 pts.)</b>	8.25	5.08	8.25	9.21	
<b>Implementation (max. 10 pts.)</b>	7.92	5.25	7.04	8.50	
<b>Cost (max. 20 pts.)</b>	13.65	19.46	13.29	20.00	
<b><u>TOTAL</u></b>	<b>76.62</b>	<b>65.50</b>	<b>75.39</b>	<b>86.86</b>	