

**Request for Proposals
For
Financial Software Package**

Request Release Date: April 6, 2021

Due Date: May 14, 2021

I. Purpose of Request

East Goshen Township, a 2nd class Township in Chester County, PA with a population of 18,000, is seeking software company proposals to implement a synergistic software system for all aspects of Township business. This would include Financial (General Ledger including: Accounts Payable, Accounts Receivable, Budgeting, Bank Reconciliation, Fixed Assets), Human Resources, Permitting, Zoning, Code Enforcement, Utility (Sewer, Refuse, Septic Management), Real Estate Tax, Public Works Management, and Parks & Recreation modules.

II. Scope of Services

The software company shall implement their offering with a goal to achieve the following:

1. Interfacing seamlessly between all modules including:
 - One system linking parcel owner/address/activity across all modules;
 - Intuitive navigation for all end users;
 - A robust reporting capability;
 - Attentive Customer support from software company during regular business hours.

2. Conversion and integration of all current data and 7 years of historical data into a system that is instinctive to navigate with the ability to view a snapshot of parcel information. Additional expectations include:
 - Summary Account Statements to include outstanding permits, fines, tax, utility, other activities;
 - Detailed account information by parcel including all activity within Codes, Permits, Tax, Utility, and any other activity;
 - Journal entry with the ability to enter all Funds on one entry and have automated balancing entries incorporated;
 - "Bill to" address information consistent among modules;
 - Drill down feature on financial reports;
 - Consolidated financial reports easily generated;
 - Tax and Utility Certifications;
 - Ability to import PDFs or other pertinent documents into parcel record;
 - Interface with 3rd party (Paymentus) for Utility payments;
 - Interface with Municipay for Tax and Permit activity;

- Interface with 3rd party (MyRec) for Parks & Rec registrations and payments;
- Streamline Public Works work orders and resident complaints.

3. Maintain the Township's commitment to transparent government.

III. Qualifications

East Goshen is seeking experienced software companies to provide the services detailed in this RFP. Experience with other municipal websites is required.

IV. Township Resources

Township staff will be available to answer questions that the software company may have that are related to this project. In addition, Township staff will be assigned as project liaisons to assist the software company with content conversion and other logistical issues as they arise.

V. Proposal Content

1. Introduction – On the cover sheet for the proposal, provide the official name, address, phone number, fax number of the organization or firm, the name of the principal contact person, and their email address.

2. Experience and Qualifications:

- A brief description of the company;
- A brief description of the experiences and qualifications of the proposed staff member(s) who will be performing the services;
- A list of three recent municipal client references (preferably within the Philadelphia metro area), including name, address, telephone number and email address.

3. A detailed overview of the work to be performed, specifically:

- how implementation is carried out by your firm;
- explanation of training included;
- specific examples of improvements that can be made that are not included in this RFP.

4. A detailed timeline of the software implementation process from kick-off to completion.

5. A detailed explanation of your licensing terms and timelines.

6. A cost for the entire project to include:

- complete software implementation for East Goshen Township across all functional areas of administration;
- the cost for the basic system and the cost for each module, if applicable;
- migration of current (2021) data and historical (2014 to 2020) data from the existing software systems
- software licensing for 2 years;
- full customer support package for the first 2 years after complete system integration.

7. Annual costs and fees for software licensing, if applicable.
8. Annual costs for technical support and all other incidental products or services after the completion of the project.
9. Explanation of data storage options and costs (on-site vs. cloud).

VI. Cost of Proposal

This request for proposal does not, under any circumstance, commit the Township to pay any costs incurred by any proposer in the submission of qualifications. The proposer is responsible for all costs associated with response to this request.

VII. Proposal Disposition

All materials submitted in response to this request for information shall become the property of the Township upon delivery and may be subject to public inspection.

VIII. Evaluation Criteria

The following criteria will be considered in the selection of a software firm:

- Implementation costs, and the ongoing cost for technical support and server, if applicable;
- Interface ability across all modules;
- Aesthetic appeal of modules;
- Ease of navigation of modules;
- Server capacity, if applicable;
- Experience of staff members assigned to the project;
- The professional reputation of the firm, as determined through a reference check.

The Township reserves the right to reject any or all proposals at any time with no penalty and to waive immaterial defects and minor irregularities in proposals. The evaluation and recommendation of proposals will be done by the East Goshen Township Implementation Team. The East Goshen Township Board of Supervisors will be responsible for the final selection.

IV. Materials to Submit

Interested parties must submit one copy (either electronic or unbound hard) of their proposal to the Township at East Goshen Township, ATTN: Chris Boylan, 1580 Paoli Pike, West Chester, PA 19380, no later than 4:00 p.m., on Friday, May 14, 2021 or by email at cboylan@eastgoshen.org.

Any questions about this project shall be submitted via email to Chris Boylan at cboylan@eastgoshen.org no later than 4:00 p.m. on Friday April 30, 2021. Questions and the responses will be post on the Township Website www.eastgoshen.org.

Interested parties are solely responsible for ensuring that proposals are delivered on time. Proposals received after the due date and time will be returned unopened. Economy of preparation and brevity are encouraged.

X. Discrimination

The Township does not discriminate on the basis of race, creed, color, ethnicity, national origin, gender, age or marital status.