Request for Qualifications

Eden Replacement Project

City of Atascadero

Information Technology Division

April 23, 2024

Responses Due Friday, May 10, 2024, by 5:00pm

Eden Replacement Project

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4/23/2024

1. Background

a. City of Atascadero

The City of Atascadero (City), California was founded in 1913 and incorporated in 1979 and has roughly 30,000 residents. Atascadero is located halfway between Los Angeles and San Francisco, along California's Central Coast. The City government is comprised of one mayor, four council members and seven departments: Administrative Services, City Manager's Office, Community Development, Community Services & Promotions, Fire & Emergency Services, Police, and Public Works.

The City is seeking to replace Eden, the current financial and HR software used by the City.

b. Important Dates/Tentative Schedule

i.	Release RFQ	4/23/2024
ii.	RFQ response deadline	5/10/2024
iii.	Review RFQ responses	May 2024
iv.	Intro demos	Weed of May 27
v.	Vendor interviews	June – July 2024
vi.	Vendor selection	August 2024
vii.	Council approval	October 2024
viii.	Project Start Date	January 2025
ix.	Go-live	7/1/2026

c. Purpose of RFQ

The City is requesting qualification responses for the implementation, support, and software to replace the current Eden software platform. This RFQ document is provided to initiate conversation and is not intended to overly formalize this process. The content of each response to this RFQ should be sufficient to let staff know that the vendor is interested in partnering with the City on this project. A full RFP level response is not requested or expected.

d. General Information

Questions regarding the contents of this Request for Qualifications (RFQ) must be submitted in writing and directed to:

Luke Knight
Deputy City Manager
lknight@atascadero.org
(805) 470-3452

e. Submission of Qualifications

Each vendor responding to this RFQ must submit their response to:

Luke Knight
Deputy City Manager
lknight@atascadero.org
Email Subject should be: "Eden Replacement RFQ Response - <vendor name>"

All responses must be received by May 10, 2024, at 5:00 pm.

Qualifications are expected to include the following items:
1. Company profile with contact information
2. Brief response to how vendor can help meet goals listed in section 2, 'Project Overview & Goals'
3. At least three (3) or more client references
    a. At least 1 municipal entity
    b. At least 1 within the State of California
    c. Clients with roughly the same population as Atascadero
    d. Clients that use the same modules that Atascadero seeks to use as well as clients that use the full portfolio of modules provided by the vendor.
4. Acknowledgement that vendor will be able to meet the proposed timeframe.

2. Project Overview & Goals

The City has been using the software platform Eden for all finance and human resources functions for about 20 years. Tyler Technologies, the software company that owns and supports Eden, has announced that Eden will no longer be supported after March 2027. Due to this end-of-life announcement staff are conducting this project to find a replacement software solution.

The goal of this project is to find a highly effective software solution that will fulfill all the City's financial and HR needs.

The City Council set the replacement of the financial system as a key focus area for the 2023-2025 fiscal cycle. Fulfilling the duty of good stewardship of public funds requires a sound financial software system to ensure that every penny is accounted for and in its proper place.

Expectations
Expectations for this project are split between the project process and the software platform.

Project Process
The vendor should schedule several on-site visits during the project.

There should be live, on-site training on the new system for all impacted staff. Dual entry into both systems before and after go-live will be conducted to validate financial reports and processes.

Staff will require a full data migration for this project. All financial records should be in the new software to ensure accurate historical reporting. The migration shall be complete, accurate and timely.

The software should be implemented prior to the deadline of March 2027.

Software Platform
Eden has been a solid system for its lifespan at the City. If Eden was not retiring, staff would be content keeping the system in place, while acknowledging that improvements in Eden could be made. Eden has robust reporting, comprehensive search options, uniform processes across all modules, modules that talk to each other, and very responsive support. Staff want to ensure that the new system will continue to excel at these functions.

While Eden has been a solid system, there are many current and advanced technologies that Eden does not support or provide that could help streamline operations and access. Eden can be slow, report formatting is not the most pleasant, error reporting on failed processes is not descriptive and makes it hard to find the actual error, and some data entry fields have limited character lengths. The new software platform should be responsive and fast, be user friendly, have descriptive and helpful error reporting, and have data input field lengths that are long enough to hold employees' full names. Electronic routing of invoices, notices, reminders, documents, etc. should be native to the system, allowing staff to continue to reduce reliance on paper processes. The new software should allow the City to meet all legal requirements. The

new software should allow staff to meet transparency requirements and expectations more easily.

The new software should have adequate security measures in place, with granular permissions, audit controls, and SSO support. Granting staff access to Eden has had mixed results over the years. More staff should have greater access to the new system through role-based permissions. Appropriate staff outside of Finance and HR should have access to limited portions of the software to generate their own reports. An employee portal should be considered, allowing staff to access pay stubs, leave balances, tax documents, etc.

The new software should be intuitive and user friendly. Processing should be uniform across all modules (data entry, edits, posting, etc.). Alerts should be active to assist staff during data entry to help avoid or limit errors when reports and postings are run. The administration of the software should also be user-friendly. Permissions, settings, and configurations should be easy to administer and adjust. The selected software should not be burdensome for Finance and IT staff to maintain. Integrations with other City systems, like Trakit, CrewSense, Laserfiche and asset management should be possible with the new system. Staff would like to move from paper to electronic timecards. The new software should either have this functionality imbedded in the platform or offer standard integrations with 3rd party systems. The new system should also accept electronic signatures or integrate with an electronic signature platform, further allowing staff to reduce paper.

Staff currently use the accounts payable, payroll, job costing, HR, general ledger, purchase orders and budgeting modules in Eden. The new software should also excel at these modules. Staff would also like to consider accounts receivable, cashiering and budget creation modules. Staff also know next-generation systems can do much more and these options will be considered during this project.

A perpetual test environment should be available, allowing staff to run test processes as needed.

The selected vendor should have a long history of strong organizational and financial health. The software should also be a mature product, in use by many other municipalities in California.

Staff want to reduce the functionality gap between the sales demo and the delivered product. This project process is designed to have that gap be as small as possible.

3. Evaluation

    a.   RFQ responders will be contacted to set up initial conversations and demos. After these initial demos, City staff will narrow down the list of considered vendors until one is selected. Follow up demos and meetings may occur during the process.