



## MEMORANDUM

**To:** CMAP Board

**From:** Stephane Phifer  
Interim Deputy, Finance and Administration

**Date:** February 14, 2024

**Subject:** Authorization to enter into a contract with Plante Moran for a total not-to-exceed amount of \$300,000 for Organizational Change Management and Training for the new D365 Enterprise Resource Planning (ERP) and other systems for a 12-month period with two 6-month options to renew.

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**PURPOSE & ACTION:** On June 8, 2023, the CMAP Board approved a contract with Arctic Information Technology, Inc. for the project management and implementation of a new Enterprise Resource Planning (ERP) system. CMAP is transitioning to a new ERP System to manage all financial and project management functions. The ERP will have a significant impact on agency staff and the agency therefore desires to execute a robust change management and training initiative, in conjunction with the ERP implementation. To achieve this result, CMAP seeks to embark on a change management initiative that will prepare CMAP staff for the impending changes associated with the new ERP Solution, including changing processes and workflows, new transparency and reporting capabilities to CMAP vendors and funders, and the technology used by staff to perform their daily work. In addition, the training initiative will assist to ensure a smooth transition to the new Microsoft Dynamics 365 system and full utilization of existing ADP and Legistar systems.

Authorization is being requested to enter into a contract with 1 Organizational Change Management consultant to work collaboratively with agency staff, oversight vendor (Berry Dunn) and ERP vendor (Arctic IT) to help ensure a smooth transition to the new Microsoft Dynamics 365 system. The OCM Consultant work is meant to enhance the ERP vendor's efforts by bringing additional expertise, experience and OCM best practices to implementation, while also providing the opportunity to tailor and better integrate these practices into CMAP's organizational culture overall.

### Review Process

A Request for Proposals (RFP) 292 was posted to the CMAP website on December 27, 2023. Staff held a non-mandatory on-line pre-bid information session for consultants on January 5, 2024. Questions posed during the on-line session and CMAP's responses were documented and posted

on the CMAP website following the pre-bid session. On January 24, 2024, CMAP received three proposals from Diversified-IT, Plante Moran and William Everett.

Proposals were reviewed and evaluated by the CMAP ERP Project team. The ERP Project team members independently scored the proposals (based solely on the submittal), taking into account the following five criteria listed in the RFP:

- 1) Project Team and Firm Capability.** The demonstrated record of experience of the consultant as well as identified staff, verified by references, in providing the professional services as described in the scope of services.
- 2) Project Approach and Understanding.** Demonstrated understanding of the scope of services the Consultant firm(s) described in the submitted project approach. Whether any recommended modifications to the scope are reasonable. Were there any ideas provided to help reduce the cost of the overall project to help increase the efficiency of the project while adhering to the scope statement. Is the project schedule reasonable and does it meet the project needs.
- 3) Integration of Core Values.** The Consultant's approach to integrating CMAP's Core Values into the project. Including the Consultant's overall philosophy and experience working with diverse and/or marginalized communities to achieve equitable outcomes.
- 4) Project Examples.** Demonstrated experience with the same (or similar) projects based on the submitted project examples. Quality and relevance of the examples of similar work.
- 5) Prior performance of previous projects with CMAP** will be considered. Consultants who are or have been seriously deficient in current or recent contract performance in the absence of evidence to the contrary or circumstances properly beyond the control of the Consultant presumed to be unable to meet these requirements. Past unsatisfactory performance ordinarily sufficient to justify a finding of non-responsibility.

**Bonus) DBE/MBE/WBE/VBE Participation.** CMAP awarded 1-bonus point overall to those qualified prime consultant respondents who have been certified as a DBE by the Illinois Unified Certification Program (IL-UCP); as a Minority Business Enterprise (MBE) or Women-Owned Business Enterprise (WBE) by the City of Chicago; or as an MBE, WBE, or Veteran-Owned Business Enterprise (VBE) by Cook County.

The individual scores of the ERP project team members were combined to develop a final composite score for the proposal. The table below shows the average score of each firm that submitted a response to the RFP, and the cost calculated from their price proposal form:

<b>Proposal</b>	<b>CMAP Score</b>	<b>Cost</b>
Diversified-IT	48.3	\$1,670,250.00
<b>Plante Moran</b>	<b>77.3</b>	<b>\$ 193,875.00</b>
William Everett	74.2	\$1,080,480.00

#### **Recommendation for Contractor Selection**

Following consideration of all proposals, the Project ERP team selected Plante Moran, the Consultant which presented the strongest approach, experience, similar work examples, and

specialized skills required to execute the work. Cost has been evaluated against other factors based upon the professional judgment of those involved in the evaluation.

It is recommended that the Board approve a contract with **Plante Moran** to perform the Organizational Change Management and training for the ERP system in an amount that is not to exceed \$300,000, which includes a buffer for unforeseen amendments, for a period of 12 months with two, six-months options to renew. This project will be supported by FY24 and FY25 UWP grants.

**Action Requested:** Approval