

Review of Proposals
RFP 9-1063 Budget and Forecasting Software
Presented to Finance and Administration Committee - October 23, 2019
11 proposals were received, 4 firms were interviewed, 1 firm is being recommended

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Total Firm-Fixed Price for Initial Term
1	87	Clarity Partners, LLC Chicago, Illinois	None	Highest-ranked firm overall. Experience in implementing and maintaining a budget and forecasting software. Proposed project manager has over 15 years of experience and a technical lead with over 20 years of experience. Demonstrated an understanding of the requirements included in the scope of work. Highlighted the transfer of knowledge to OCTA's staff during the implementation phase. Identified the process for addressing questions or concerns regarding software's functionality. Presented approach and answered questions during the interview. Received positive responses from references. Proposed the lowest total firm-fixed price.	\$536,067
2	82	Applied Software Technology, LLC Santa Clara, California	None	Second-ranked firm overall. Experience in implementing and maintaining a budget and forecasting software. Proposed project manager has over 20 years of experience and a technical lead with 15 years of experience. Demonstrated an understanding of the requirements included in the scope of work. Addressed quality control reviews to ensure accuracy and included a timeline for delivering final reports. Presented approach and answered questions during the interview. Received positive responses from references. Proposed a competitive total firm-fixed price.	\$708,000
3	80	InnoFin Solutions, LLC Denver, Colorado	None	Third-ranked firm overall. Experience in implementing and maintaining a budget and forecasting software. Proposed project manager has over 15 years of experience. Demonstrated an understanding of the requirements included in the scope of work. Addressed quality control reviews to ensure accuracy and included a timeline for delivering final reports. Presented approach and answered questions during the interview. Received positive responses from references. Proposed a competitive total firm-fixed price.	\$581,785
4	78	Gilney Consulting, LLC Costa Mesa, California	None	Fourth-ranked firm overall. Experience in implementing and maintaining a budget and forecasting software. Proposed project manager has over 15 years of experience. Demonstrated an understanding of the requirements included in the scope of work. Addressed quality control reviews to ensure accuracy and included a timeline for delivering final reports. Presented approach and answered questions during the interview. Received positive responses from references. Proposed the highest total firm-fixed price.	\$692,379

Evaluation Panel: (5 members)

- Contracts Administration and Materials Management (1)
- Financial Planning and Analysis (2)
- Accounting and Financial Reporting (1)
- Information Systems (1)

Proposal Criteria

- Qualifications of the Firm
- Staffing and Project Organization
- Work Plan
- Cost and Price

Weight Factors

- 25%
- 15%
- 35%
- 25%