



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: October 2, 2024

Department: Finance

Title: ERP Software & Implementation Services Request for Proposal - Special Procurement

Management Update/Work Session Date: September 17, 2024 Audio/Visual aids

Time Required: 5 min Contact: Toby Giddings Phone: x5047

Requested Action: Approval of the Special Procurement.

Issue, Description & Background: The County intends to issue a Request for Proposal (RFP) pursuant to ORS 279B.085 and MCPCR 20-0285, Special Procurement. The RFP will solicit proposals from Software Integrators and Software Vendors who provide their own integration services. The County will evaluate proposals consisting of a combination of implementation services and software packages. The best value proposer will be determined based on the evaluation criteria described in the RFP. Typically a Request for Proposal is issued pursuant to ORS 279B.060 and MCPCR 20-0260/0261. We are seeking approval of this Special Procurement because ORS 279B.060 requires that awards are made only to proposers, and does not allow the flexibility of the proposed approach stated above.

Financial Impacts: None at this time.

Impacts to Department & External Agencies: None at this time.

List of attachments: Special Procurement, Notice of Request for Approval of Special Procurement

Presenter: Jeff White

Department Head Signature:  D1FCCAACDB14CB...



CONTRACT-SPECIFIC SPECIAL PROCUREMENT

FI1554-24

for

ERP Software and Implementation Services

Marion County is conducting a Special Procurement pursuant to ORS 279B.085 and MCPCR 20-0285.

1. BACKGROUND

The County currently uses numerous software systems and various manual processes in efforts related to Project Accounting, Payroll, Budgeting, Maintaining the General Ledger, Human Capital Management, Accounts Receivable and Accounts Payable, Purchasing, Solicitation and Contract Management, Timesheet Management, Benefits Administration, Learning and Performance Management, Asset Management, Cash Management, Grants Management, and other County-wide management services.

The County's current ERP software is Oracle EBS, which serves approximately 1655 employees with 134 licensed users across 15 departments. The ERP software was originally purchased and implemented in January 1999 and upgraded in 2021 to version 12.2, and the County is now looking to explore new ERP software options.

2. CONTRACTING PROCEDURE

The County intends to issue a Request for Proposal (RFP) pursuant to ORS 279B.085 and MCPCR 20-0285, Special Procurement. The RFP will solicit proposals from Software Integrators and Software Vendors who provide their own integration services. The County will evaluate proposals consisting of a combination of implementation services and software packages. The best value proposer will be determined based on the evaluation criteria described in the RFP.

If the highest ranked proposer is a Software Integrator who proposes to integrate a Software Vendors solution, multiple contracts will be awarded resulting from the RFP. One Contract to the Software Integrator, one Contract to the Software Vendor, with the possibility of additional Contracts determined on the highest ranked proposal.

If the highest ranked proposer is an entity who proposes to provide both the solution and the integration services, one or more contracts will be awarded resulting from the RFP.

3. GOODS AND SERVICES

The goods and services to be procured under this special procurement are as follows:

A. ERP Application Software

A new ERP solution.

B. Implementation Services

Implementation services to move the County from its existing ERP solution to the newly selected ERP solution as well as ongoing solution support.

C. Additional Modules

Additional modules may be purchased during the use of the ERP solution.

D. Maintenance and Support

Ongoing Maintenance and Support of the ERP solution.

4. REQUIREMENTS

Pursuant to MCPCR 20-0285 The county may award a contract as a special procurement pursuant to the requirements of ORS 279B.085. The Board may approve a special procurement if the procurement:

A. ORS 279B.085(4)(a)

Is unlikely to encourage favoritism in the awarding of public contracts or to substantially diminish competition for public contracts; and

B. ORS 279B.085(4)(b)(A)

Is reasonably expected to result in substantial cost savings to the contracting agency or to the public; or

C. ORS 279B.085(4)(b)(B)

Otherwise substantially promotes the public interest in a manner that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065 or 279B.070 or under any rules adopted thereunder.

5. DETERMINATION AND FINDINGS

A. ORS 279B.085(4)(a)

The Special Procurement process proposed is to conduct a fully open and public procurement process. The Request for Proposal will be published both on the Marion County Procurement Collaboration Portal and on OregonBuys for a long enough time for all

interested parties to offer a proposal. In addition to the two publication areas, Plante & Moran will assist the County with additional notifications to potential Proposers.

B. ORS 279B.085(4)(b)(A)

This process is expected to result in substantial cost savings as this process will allow us to conduct a single formal procurement process to award one or more contracts to the entity or entities who provide the software and integration combination that is in the best interest of the County.

C. ORS 279B.085(4)(b)(B)

This process promotes the public interest in a manner that could not practicably be realized by complying with the requirements that are applicable under

i ORS 279B.055

Competitive Sealed Bids would not allow the County to select a solution based on best value.

ii ORS 279B.060

Competitive Sealed Proposals would not allow us to award a contract to an entity that does not directly submit a proposal.

iii ORS 279B.065

The value of the resulting contract(s) will be greater than is allowed under Small Procurement.

iv ORS 279B.070

The value of the resulting contract(s) will be greater than is allowed under Intermediate Procurement.

6. LENGTH OF TIME

The length of time/duration for this special procurement is throughout the term of the contract(s) resulting from the Request for Proposal issued pursuant to this Special Procurement.

7. RESULTS OF INITIAL POSTING

A Notice of Request for Approval of a Special Procurement was posted on the Marion County Procurement Collaboration Portal and on OregonBuys for ten days, from August 30, 2024, through September 9, 2024.

No comments or protests were received as a result of this Notice.

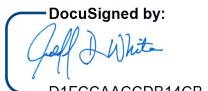
8. REVIEW AND APPROVAL

MARION COUNTY SIGNATURES BOARD OF COMMISSIONERS:

Chair	Date
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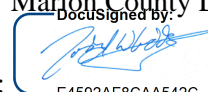
Commissioner	Date
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Commissioner	Date
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Authorized Signature:	 D1ECCAACCD814CB	Date
	Department Director or designee	Date

Authorized Signature:	_____	Date
	Chief Administrative Officer	Date

Reviewed by Signature:	_____	Date
	Marion County Legal Counsel	Date

Reviewed by Signature:	 E4592AE8CAA542C	Date
	Marion County Contracts & Procurement	Date



NOTICE OF REQUEST for APPROVAL of a SPECIAL PROCUREMENT

FI1554-24

for

ERP Software and Implementation Services

Release Date: **August 30, 2024**

Comments / Questions / Protest Due: **September 9, 2024, by 2:00PM PST**

1. NOTICE

The County will be requesting its Board of Commissioners approve a special procurement. Prior to the request being presented to the Board, pursuant to MCPCR 20-0285, a notice must be advertised providing the public an opportunity to protest the request.

2. DOCUMENTS

Electronic copies of this notice and all related documents can be obtained from the Marion County Procurement Collaboration Portal at the following URL:

<https://contracts-marioncountygcc.msapproxy.net/gateway/>

3. REQUEST

Please review the document titled "FI1554-24 – Special Procurement". This document includes all of the elements required to satisfy ORS 279B.085 and MCPCR 20-0285, Special Procurement.

4. COMMENT, QUESTION, AND PROTEST OPPORTUNITY

MCPCR 20-0285(4) states that an affected person may protest the approval of or request for approval of a special procurement in accordance with ORS 279B.400 and section 20-0700.

If you wish to provide comments, questions, or a protest to the request for approval of a Special Procurement, it must be done so through the Marion County Procurement Collaboration Portal at the URL listed above, by the time and date listed above.

5. RESPONSE INSTRUCTIONS

A. Log Into the Procurement Collaboration Portal

- i Go to the Marion County Procurement Collaboration Portal which can be found at:
<https://contracts-marioncountygcc.msapproxy.net/gateway/>
- ii Sign In or Create an Account
- iii Creating an account MUST be completed 15-30 minutes before files will be able to be submitted through the portal.

B. Solicitations Tab

- i At the top of the page, hover over Solicitations
- ii Select Search All Solicitations
- iii Click View next to the applicable solicitation

C. Opportunity Details

- i ***Viewing Documents*** – Scroll down the page to the Files, Documents, Images section, Public Files: subsection. Here you will find all of the relevant files.
- ii ***Submitting a Question*** – If you would like to submit a question, scroll down the page to the Questions & Answers section. Type your question in the My Questions/Answers text box and click the Ask Question box.
- iii ***Register as Respondent*** - If you are interested in responding to the posting, click the button Register as Respondent on the left side of the screen.
- iv ***Submitting Documents*** – If you would like to submit a response to this posting, scroll down the page to the Files, Documents, Images section, My Files: subsection. Here you will Select a file, select a File Category, and type a description before clicking the Save File button.
- v ***Response Status*** – Once you have registered as a respondent and submitted documents, scroll to the bottom of the page to the Response Status section and select the appropriate status for your submission, then click Submit.

6. **DISCLAIMER**

This notice is issued to support the Special Procurement; it does not constitute a solicitation on its own. There will not be an evaluation or scoring of the material submitted. No information received in response to this notice will be returned. Responses to this notice are not an offer and cannot be accepted by the County to form a binding contract. Respondents will not necessarily be notified the result of this notice, or future solicitation opportunities.