



Enterprise Resource Planning Modernization
REQUEST FOR INFORMATION

Project No. ITS-006-26

INFORMATION TECHNOLOGY SERVICES

FINANCE

HUMAN RESOURCES

November 13, 2024

This Request for Information (RFI) from Boston Public Health Commission (BPHC) Finance, Human Resource, and Information Technology Services offices requests Enterprise Resource Planning (ERP) Software Solution Provider and Software Implementation Vendor responses regarding how current ERP solutions meet the BPHC’s current ERP requirements; and for those solutions, Vendors’ recommended implementation approach and ranged estimates for solution pricing, implementation costs, and implementation timeline.

That Vendor-provided information will help BPHC refine its planned Quarter 1 (Q1) 2025 Requests for Proposal for the procurement of an ERP software solution and related software implementation professional services support. Responses to this RFI will not directly result in a contract with BPHC.

Request for Information (RFI) Schedule	
Wednesday, November 13, 2024	RFI to be published in The Boston Globe. RFI available at 2:00 PM ET at www.boston.gov/bid-listings .
Friday, November 22, 2024	Vendor questions due by 5:00 PM ET via email to RFR@bphc.org . Each vendor should consolidate questions into a single, emailed submission with the email subject being “ERP RFI Questions.” BPHC will not respond directly to Vendor emails.
Wednesday, December 4, 2024	BPHC responses to Vendor questions posted by 5:00 PM ET at www.boston.gov/bid-listings .
Friday, December 20, 2024	Vendor RFI submissions due by 5:00 PM ET via email to RFR@bphc.org with the email subject being “ERP RFI Response.” BPHC will not respond directly to Vendor emails.

NOTE: This is the anticipated schedule. While it is BPHC’s intention to follow this schedule and conduct activities in a timely manner, unforeseen circumstances may arise that can affect it. If the BPHC needs to make schedule changes, it will release that updated schedule as an amendment to this RFI at www.boston.gov/bid-listings.

Certified Underrepresented Businesses Enterprise Participation

As part of BPHC’s efforts to have an equitable procurement process, BPHC encourages the participation of Supplier Diversity Office of Commonwealth of Massachusetts Certified Underrepresented Businesses Enterprise (CUBE) businesses, which includes: Minority- owned Business Enterprises (MBE), Women-owned Business Enterprises (WBE), Veteran-owned Business Enterprises (VBE), Disability-owned Business Enterprise (DOBE), Lesbian Gay Bisexual Transgender Business Enterprises (LGBTBE), Minority Non-Profit(MNPO), Women Non-Profit (WNPO), Minority Women Non-Profit (MWNPO) and local businesses.

Public Records Laws

Certain records and documents created or received in connection with this RFI may be subject to public disclosure under applicable Public Records Laws, including but not limited to M.G. L. c. 4, § 7(26) and 950 CMR 32.00. Therefore, BPHC may be required to disclose records pursuant to Public Records Law, and as such, BPHC will use reasonable efforts to identify and label any information they believe to be proprietary or confidential prior to disclosure.

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Section I – Background Information

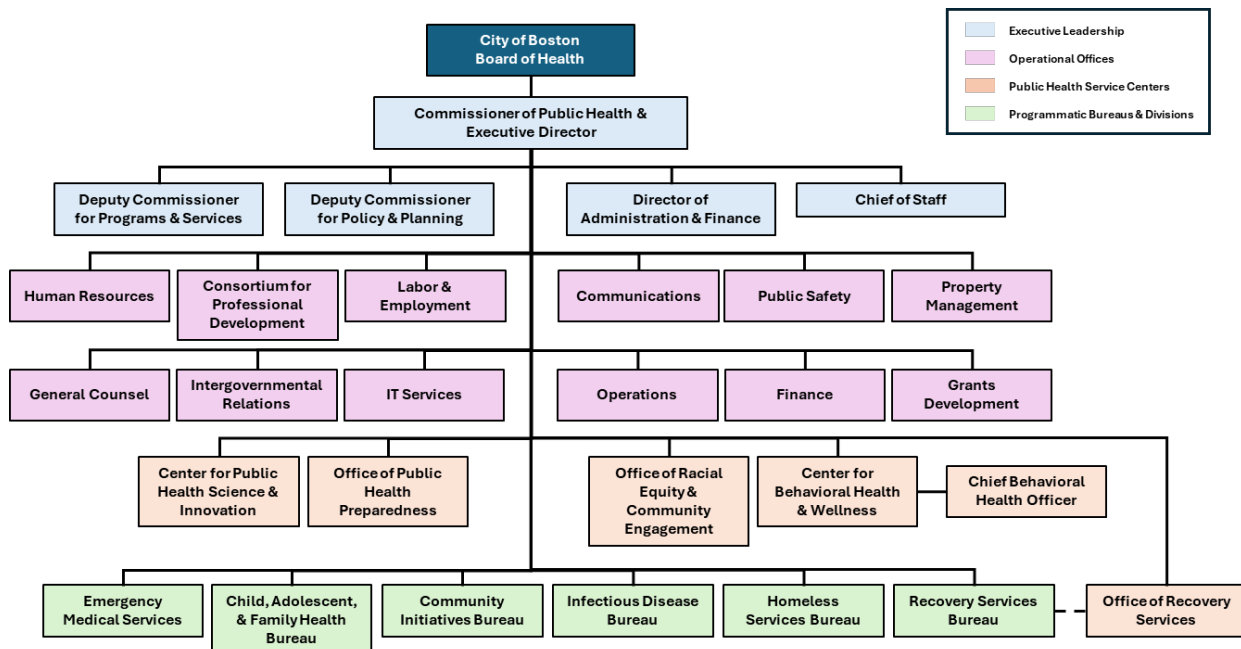
This Request for Information (RFI) from Boston Public Health Commission (BPHC) Finance, Human Resource, and Information Technology Services offices requests Enterprise Resource Planning (ERP) Software Solution Provider and Software Implementation Vendor responses regarding how current ERP solutions meet the BPHC’s current ERP requirements; and for those solutions, Vendors’ recommended implementation approach and ranged estimates for solution pricing, implementation costs, and implementation timeline.

That Vendor-provided information will help BPHC refine its planned Quarter 1 (Q1) 2025 Requests for Proposal (RFP) for the procurement of an ERP software solution and related software implementation professional services support. Responses to this RFI will not directly result in a contract with BPHC.

Overview of BPHC

BPHC is the local public health department for the City of Boston and the country’s oldest health department. BPHC’s mission is to work in partnership with communities to protect and promote the health and well-being of all Boston residents, especially those impacted by racism and systemic inequities.

BPHC has 1,300+ employees, including 800+ union employees represented by 8 unions, working in 12 operational offices, 5 public health service centers, and 6 programmatic bureaus and divisions. Additionally, there are 5,400+ active vendors contracted to support BPHC, including 550+ contingent workers (i.e., 1099 contractors). BPHC’s annual city appropriation is \$140m, which combined with grants and other revenue amounts to an annual budget of approximately \$259m.



BPHC's six bureaus stand as a perfect example of how the BPHC executes its mission every day:

- [Boston Emergency Medical Services \(EMS\)](#): Compassionately delivers excellent pre-hospital care and protects the health and safety for the public. Boston EMS is one of three public safety agencies that respond to 9-1-1 calls.
- [Child, Adolescent, & Family Health Bureau \(CAFHB\)](#): Addresses the physical, emotional, and mental health needs of Boston children and families. The Bureau offers programs where residents live, learn, work, and play, including: in and out of school programming for adolescents; initiatives to prevent and respond to violence; and support for families with young children before, during, and after birth.
- [Community Initiatives Bureau \(CIB\)](#): Addresses health issues affecting Boston citywide. The Bureau offers community and home-based services. The Bureau supports BPHC's commitment to: addressing environmental health hazards; chronic disease prevention and management; healthcare access; and health homes and businesses.
- [Infectious Disease Bureau \(IDB\)](#): Works with diverse populations to reduce the impact of infectious diseases, prevent death associated with these diseases, and create healthier lives for the residents of Boston. The Bureau's work includes: disease surveillance; HIV / AIDS-related services; investigation of cases and outbreaks; and community and provider education.
- [Homeless Services Bureau \(HSB\)](#): Oversees programs that address complex needs associated with adults experiencing homelessness. This includes: emergency shelter; health and behavioral health services; job readiness and training; and housing navigation services.
- [Recovery Services Bureau \(RSB\)](#): Provides a coordinated continuum of substance use care from prevention to treatment to recovery, with an emphasis on vulnerable populations. Bureau services include: prevention; harm reduction; outreach, engagement, and access to care; and outpatient and residential treatment.

Additionally, BPHC services also include research and data analysis, mental and behavioral health initiatives, training and support of Community Health Workers, public health preparedness, legislative advocacy for public health priorities, and other programming to address health equity.

BPHC's Pursuit of a Modernized ERP System

Over the past few years, public health challenges have intensified and the demands on BPHC have grown. Boston has seen a growing need for a strong public health infrastructure as the health and wellness of Boston residents has been impacted by so many challenges. Added to COVID-19 and other emerging infectious diseases, increased mental and behavioral health needs, the enduring and growing opioid epidemic, greater strain on our healthcare systems, stark racial and ethnic disparities in health outcomes, and increased cost of living have made it difficult for individuals and communities across Boston to address basic and more complex needs. In large part because of competing priorities and limits in capacity, the foundational capabilities of BPHC's HR and Finance offices have remained essentially at pre-COVID levels.

BPHC's 2024-2027 Strategic Plan set an objective of enhancing its enterprise systems to improve BPHC work and programs by the end of 2027. To that end BPHC began an enterprise-level initiative focused on the following:

1. Implement a software solution that will collectively serve the needs of BPHC including the following integrated core functions:
 - a. *Human Resource / Human Capital Management*: With the ability to manage the entire employee lifecycle (i.e., from talent acquisition through separation), including payroll.
 - b. *Financial Management*: Manage budgeting, procure-to-pay (P2P, i.e., procurement and accounts payable), expense management, accounts receivable, third-party billing, grants management, banking, asset management, financial accounting, and project management.
2. Acquire the ability to use automation to administer requirements for eight unique unions with different job profiles, compensation plans, step progression, and negotiating periods.
3. Modernize BPHC's business process capabilities, including streamlining and automating legacy business processes and adopting standardized industry best-practices.
4. Provide BPHC employees a modern user experience that includes embedded support for mobile and social communications, self-service applications, and ad hoc reporting.
5. Simplify BPHC's technology architecture by reducing the number of third-party software tools required for its core business processes.
6. Implement the acquired solution(s) using best practices for project management, organizational change management, and business process transformation working with highly qualified vendors with proven, relevant experience.
7. Modern security with features such as role-based security, single-sign-on enablement, and support of superusers.

In fall 2024 BPHC used those priorities to begin assessing its current ERP systems and business processes and defining future state ERP requirements. The initial results of that work have informed this RFI, and cover the following areas (see *RFI Section II and IV* for more detail):

- General
 - System Access
 - Document Management
 - User Interface
 - Communications
 - Data Management
 - Compliance and Policies
 - Integrations
 - Reporting
 - Workflow
- Human Resources/Human Capital Management (HR/HCM)
 - Organizational Management

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- Employee Recruiting and Onboarding
- Benefits
- Compensation
- Time and Attendance
- Payroll
- Performance
- Talent Management
- Succession
- Employee Learning
- Financial Management (FIN)
 - General Ledger
 - Procurement
 - Accounts Payable
 - Accounts Receivable
 - Third-party Billing
 - Asset Management
 - Grants Management
 - Budget Management
 - Capital Project Management

BPHC plans to release RFPs in Q1 of calendar year 2025 to first procure an ERP software solution that meets its functional, technical, and compliance requirements, and then based on that software selection procure software implementation professional services. BPHC's goal is to begin implementation by early calendar year 2026 and finish implementation in calendar year 2027, with a potential deployment of all modules by the start of BPHC's fiscal year on July 1, 2027.

Section II – BPHC’s Current ERP Environment

BPHC currently operates with legacy human resource / human capital management (HR/HCM) and financial management (FIN) solutions that are highly customized and leverage a variety of disparate and disconnected systems. General challenges with that current state BPHC wants to address with a new ERP solution include:

- Limited integration between systems requires heavy reliance on manual processes to populate data from one system into another system, particularly between their HR/HCM ADP system and FIN Microsoft (MS) Dynamics GP system. This lack of integration also limits reporting capabilities, budget forecasting, and financial analysis.
- Limited automation and missing or misaligned system workflows lead to heavy redundancy, common rework due to errors, and generally longer, heavily manual, and time intensive business processes.
- Lengthy durations for system load times and running reports, which further exacerbates already time-intensive business processes.
- Difficulty effectively maintaining the broad suite of systems that make up its current state, with the oftentimes necessary default to ‘way it’s been’ practices, convoluted workarounds, or over reliance on individual staff with knowledge to improve configurations and processes.
- Reliance on individual-based permissions or inconsistently applied role-based permissions, leading to onboarding delays, maintenance challenges, and unnecessary risks to system and data security.

HR/HCM Current State

The BPHC HR/HCM services include organizational management, employee recruiting and onboarding, benefits management, compensation management, talent and performance management, succession management, and time, attendance, and payroll management.

The BPHC HR team primarily uses ADP-based solutions for its current business processes. While the BPHC’s full time employee size is relatively small (1,400+), a complicating factor for HR/HCM business processes is managing multiple employee types (union, non-union, contingent [i.e., 1099 vendors]) and eight unions representing employees. Compounding the general current state challenges noted above, the HR team needs to execute frequently occurring business processes to support that diverse workforce (e.g., weekly payroll processing, multiple time off and leave accruals based on employee type and union).

HR/HCM Software

BPHC uses the following software for its core HR/HCM processes.

- **General HCM & Payroll:** ADP Enterprise HR (version 5.22.26)
- **Hiring & Recruiting:** ADP Workforce Management Hiring
- **Analytics and Reporting:** ADP Enterprise HR

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The following table of internal and external applications rounds out the software interfaced with ADP or employed in conjunction by the BPHC HR team.

Application	Current Use	Integration Status
Cornerstone	Learning management system	In implementation, not integrated
Smart Plan	457b benefits management system	Not integrated; manual entry
Perform Yard	Performance management system	Not integrated; manual entry
Sign Now	Electronic signature	Not integrated, stored in various systems
Telestaff	EMS scheduling software used by the city	Manually loaded into E-time for time recording for EMS employees
E-Time	Employee time keeping through the web and integrated with time clocks	Integrated to ADP Payroll to keep time keeping through either web entry or time clocks
Aquera	Identity management	ADP Enterprise HR utility An ADP-to-MS Active Directory (AD) feed runs twice daily to create new employee accounts and update existing employee accounts. There is a weekly writeback from MS AD-to-ADP to update email address information in ADP for employees.
E-Verify	Employee I9 verification	Bidirectionally with ADP
External websites for recruiting	- LinkedIn Recruiter - Handshake - Idealist	Not integrated
Massachusetts Commission Against Discrimination	External employee learning (anti-harassment, etc.)	Not integrated

HR/HCM Process and Policy Notes

- Open enrollment occurs annually in October and November.
- Benefits processing is centralized through the City of Boston and information is manually entered into the carriers' system.
- W-2 processing, and the generation of paychecks is handled via ADP.
- 1095C Production is manual and slips are mailed via ADP.
- The Office of Human Resources is responsible for providing consultative services to employees on the variety of benefits programs available; assisting with retirement options; administering the assisting with health insurance, enrollments and payroll entries; and maintenance of benefits during Leave Without Pay.
- Time keeping is handled through E-Time and ADP.
- Absence accruals are generally manually done through ADP.
- Onboarding for payroll is central along with the primary HR and IT functions. Departments perform all other employee onboarding.

FIN Current State

The BPHC’s financial services are comprised of budgeting, general accounting, procure-to-pay (P2P, i.e., procurement and accounts payable), accounts receivables, asset management, grants management, and capital project management.

The core systems the BPHC Finance team uses are MS Dynamics GP and ReQlogic. While those two systems are integrated, there is limited integration to additional systems. A key example is there being no integration between HR’s ADP workforce management system and FIN’s MS Dynamics GP system, requiring heavily manual processes to maintain data between the two. Another key example is that the current Oracle Planning Budgeting Cloud Services (PBCS, i.e., Oracle Hyperion) system meant to be dedicated to planning and budgeting is also not integrated to other financial systems and requires MS Excel uploads from MS Dynamics GP; this results in the BPHC Finance team largely using the Oracle system as a reporting tool instead of the desired, dynamic budget management tool.

FIN Software

BPHC uses the following software for its core FIN processes, with heavy use of MS Excel across those functions to enable disconnected processes.

- **Finance & Accounting:** MS Dynamics GP 2022 (version 18.5.1661)
- **Grants:** MS Dynamics GP, ReQlogic (version 12)
- **Procurement:** MS Dynamics GP, ReQlogic
- **Accounts Payable:** MS Dynamics GP, ReQlogic
- **Accounts Receivable:** MS Dynamics GP, ReQlogic
- **Planning & Budgeting:** Oracle Planning Budget Cloud Services (PBCS, i.e., Oracle Hyperion)
- **Auditing:** FastPath Assure (version 24.22 cloud)
- **Analytics and Reporting:** MS Dynamics GP, Microsoft SQL Server Reporting Services (SSRS)
- **Capital Assets:** MS Dynamics GP

The following table of internal and external applications rounds out the software interfaced with the systems above or employed in conjunction by the BPHC Finance team.

Application	Current Use	Integration Status
FastPath	- FastPath Assure (v24.22 cloud): Auditing - FastPath Config Active Directory Desktop (v5.4.7.0): SSO support for MS GP	Limited; Config AD module integrated with SSRS
Rockton SmartFill	MS Dynamics GP utility for autofill population	MS Dynamics GP utility
Greenshades Center for Federal 1099s	MS Dynamics GP utility for 1099 integration	MS Dynamics GP utility

Application	Current Use	Integration Status
Ethotech Next Numeric Collection	MS Dynamics GP utility for customer, vendor, item, fixed asset, employee, etc., ID creation	MS Dynamics GP utility
Mekorma MICR	MS Dynamics GP utility for check printing	MS Dynamics GP utility
Liaison	MS Dynamics GP utility for payment notification	MS Dynamics GP utility
Bank of America Portal	- Cash Pro: Load batch payment files created from MS Dynamics GP - Liaison: Send payment acknowledgements	Limited, primarily manual processes and email notifications
Division or Bureau-specific applications managing payments, permits, etc.	- CareLogic: Medical provider billing - Digitech: Payment processor for healthcare - HS Govtech: Permits for nail salons, tobacco, burial, etc.	Not integrated
External Grant Management & Compliance Sites	Input information in more than six, third-party systems (e.g., FSRS, EIM, PMS, ASAP.gov, Just Grants, Grant Solutions)	Not integrated
Operative IQ	Inventory management system, primarily used by BPHC bureaus independently	Not integrated

FIN Process and Policy Notes

Current FIN business processes and policies include the following.

- **General Ledger (GL):**
 - Fiscal year ends June 30.
 - GL closes monthly, quarterly, and annually.
 - Chart of Accounts (COA): BPHC uses a project ID to account for Funding Source, Fiscal Year, and Bureau Code
 - Journal Entries are input by the BPHC Accounting team
 - Financial statements produced on recurring and ad hoc basis
- **Procurement and Accounts Payable:** Procurement and accounts payable processes are managed manually through several disconnected systems, including MS Dynamics GP, ReQlogic, a MS Access database (actively being phased out by BPHC), MS SharePoint for uploading contacts and procurement documents, and email. Payments are made through the Bank of America Portal. The BPHC does use P-cards for some purchases.
- **Accounts Receivables:** Each BPHC bureau has unique processing requirements with different processes to send out billing and apply funds, including receiving money for permits, licenses and few different systems including HS GovTech, Digitech, and Carelogic for submitting bills through the State of Massachusetts’s Department of Public Health.
- **Asset Management:** Assets are managed through MS Dynamics GP.
- **Budgeting:** BPHC maintains Oracle PBCS for historic and future record keeping and access, but it is not leveraged for active analysis or planning due to lack of integration and

customization. Detailed analysis and planning occur offline using MS Excel based systems and imported accounting data.

- **Grants Management:** BPHC currently manages grants from 19 Federal funding agencies (e.g., Department of Health and Human Services, Department of Justice), and updates in 6+ Federal and state compliance-related systems (e.g., FSRS, EIM, PMS).
- **Capital Projects:** Capital projects are managed through MS Dynamics GP with billing occurring to the City of Boston as needed.

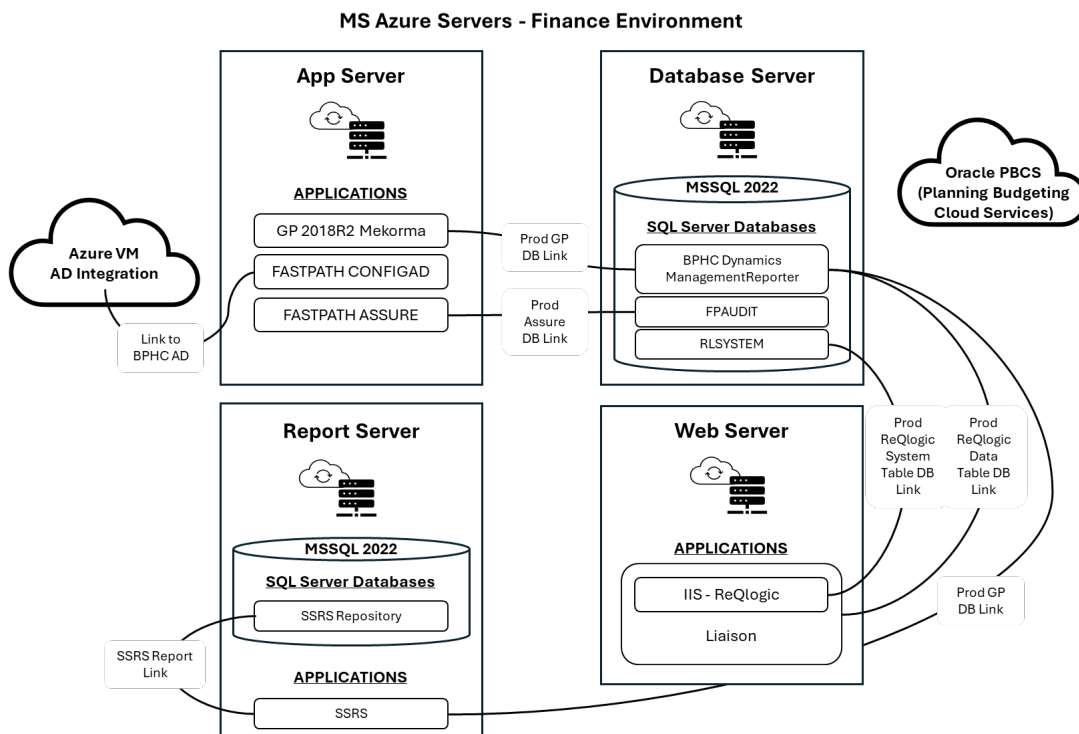
Additional ERP Technical Architecture Details

BPHC Information Technology Services (ITS) supports some elements of the current HR/HCM and FIN technical architecture. Third-party software management vendors support the FIN systems, primarily MS Dynamics GP and ReQlogic.

In addition to the HR/HCM and FIN systems noted above, BPHC uses MS 365 across its enterprise (e.g., MS Outlook, MS Teams, MS SharePoint, MS Access) and uses MS Active Directory (AD) for its single-sign-on (SSO) capability. In some instances, additional workarounds were required to connect systems with MS AD to enable SSO (e.g., FastPath Configuration AD Desktop).

Data Architecture

BPHC invested in a dedicated MS Azure Gov cloud-based server set up, with four servers as outlined in the diagram below solely servicing the BPHC FIN environment. BPHC ITS has a dedicated database administrator for those servers' maintenance and operations.



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BPHC's MS SQL Server supporting the backend of MS Dynamics GP and ReQlogic contains 187 GB of structured FIN data in SQL Databases (2022) format dating back to 2009-2010.

BPHC abides by the Commonwealth of Massachusetts Public Records Law, including but not limited to M.G. L. c. 4, § 7(26) and 950 CMR 32.00, and the State and City of Boston public records request (PRR) policies and procedures which govern record retention and the sharing of public records with requesting individuals or entities.

Section III – Request for Information

BPHC is releasing this RFI to inform its planned Q1 2025 RFPs for the procurement and implementation of a modernized ERP solution. Responses to this RFI will not directly result in a contract with BPHC.

BPHC invites both ERP Software Solution Providers (“SW Vendors”) and Software Implementation Vendors (“SI Vendors”) to respond to this RFI. While BPHC’s facilitation of this RFI (e.g., schedule and deadlines, handling of Vendor questions) will remain the same for both vendor types, this section includes specific instructions for how SW Vendors and SI Vendors should each respond to this RFI.

BPHC’s objectives for this RFI are:

1. Elicit and assess information about SW Vendors’ ability to meet BPHC’s requirements with their modern ERP solutions,
2. Elicit SW Vendors’ recommended implementation approach and estimates for solution pricing and general cost of implementing, training, and maintaining that solution based on those requirements,
3. Elicit SI Vendors’ perspective on how modern ERP solutions meet BPHC’s requirements, including which of those requirements may prove more challenging to meet and how to approach those accordingly in implementation,
4. Recognizing it may be challenging due to not yet knowing BPHC’s chosen ERP software solution, elicit ERP SI Vendor approach to and cost estimates for implementing an ERP software solution based on its requirements, and
5. Use Vendors’ RFI responses to refine the scope, approach, requirements, and vendor instructions of the to-be-released Q1 2025 RFPs

Vendors should note that BPHC will continue to refine the requirements included within this RFI based on its continuing discovery efforts as well as Vendors’ RFI responses. The eventual Q1 2025 RFPs will include the final requirements.

While responding to this RFI is not a prerequisite to respond to the eventual RFPs, BPHC highly encourages Vendor participation so it can use that input to release more refined RFPs and thereby facilitate a more effective procurement process in Q1 2025.

BPHC Contact Information for Questions and Submissions

Any questions regarding this RFI and the Vendors’ RFI response submissions should be sent to RFR@bphc.org specifically noting “ERP RFI Questions” or “ERP RFI Submission” in the subject line, respectively. BPHC will not respond directly to Vendor emails and any question submitted to that BPHC email address will be included in the distributed RFI Vendor Q&A document.

Vendor Qualifications

BPHC is seeking RFI responses from SW Vendors who offer software-as-a-service (SaaS) ERP software solutions that wholistically meet the requirements described in *RFI Section IV* and SI Vendors with experience implementing such ERP software solutions.

SW and SI Vendors responding to this RFI should be able to demonstrate past performance relevant to delivering the functionality described in this RFI's requirements for organizations like the BPHC.

RFI Instructions for SW Vendor Responses

Interested SW Vendors must submit a written RFI response in PDF including all requested information in an email sent to RFR@bphc.org before Friday, December 20, 2024 at 5:00 PM ET.

BPHC requests that each response is thorough, complete, and addresses the specific instructions noted below.

The written RFI response must include the following information within the page limits noted below:

1. Vendor Profile (*no more than 1 page*), including:
 - a. Vendor name
 - b. Vendor official address
 - c. Vendor proposal manager, including their contact information (e.g., email, phone number)
 - d. If applicable, identify any relevant company certifications (e.g., if hold Certified Underrepresented Business Enterprise [CUBE] status)
2. Summary of Vendor Solution (*no more than 5 pages*), including:
 - a. Summary of how the solution is designed, whether it is a SaaS product, and the unique benefits it provides customers
 - b. Summary of the solution modules or products required to meet all requirements stated in this RFI, and how those modules can be integrated for a single, streamlined user experience
 - c. Summary of how the solution can integrate with separate, external systems or applications and any specific standards, dependencies, or specific methodology for doing so
 - d. Summary of the solution's access protocol, whether it is role-based, individual-based, or hybrid, and how that is best managed by users
 - e. Summary of the Vendor solution's data management standards and methodology, how it can aid the transformation and migration of legacy HR/HCM and FIN data into the new solution, and how it can conform to BPHC's necessary record and data management standards
 - f. Summary of past performance delivering functionality described in this RFI's requirements for organizations like the BPHC

3. Complete the requirement tables included in *RFI Section IV* in any format choose, but specifically including:
 - a. Requirement Item Name, Number, and Description
 - b. “Yes or “No” as to whether the Vendor’s solution meets the requirement
 - c. Any clarifying details BPHC should know about that response (e.g., would require separate and commonly integrated tool to meet requirement, would require basic or significant configuration changes, will be addressed in upcoming product release)
4. Summary of Recommended Implementation Approach (*no more than 3 pages*)
 - a. Include a description and timeline of the high-level approach based on where the proposed solution has been successfully implemented for clients of similar scope
 - b. This section should fully consider the background given in RFP Sections I and II about BPHC and its current ERP environment and how the degree of change from current to future state informs the Vendor’s proposed approach and level of effort
 - c. It should also describe how the Vendor would itself execute or coordinate a to-be-selected SI Vendor to effectively implement their solution to meet BPHC’s requirements
5. Pricing and Cost Estimate
 - a. Breakdown of estimated subscription costs by the respective modules / features noted as necessary in response to *RFI Section IV’s* requirements, for a 5-year period
 - b. Estimate ranges for implementation, training, and support/maintenance costs based on recommended implementation approach
 - c. Where necessary, note any key variables and their associated effect on these pricing and cost estimates

BPHC understands that Vendors may need to make assumptions about its current state environment, intended requirements, or eventual SI Vendor selection to respond to this RFI. At this stage, BPHC requests that Vendors state those assumptions and how different circumstances may influence their proposed solution, approach, pricing, cost, etc., within their RFI responses.

Vendors currently on Commonwealth of Massachusetts Information Technology Statewide contracts can reference those contracts within their response.

RFI Instructions for SI Vendor Responses

Interested SI Vendors must submit a written RFI response in PDF including all requested information in an email sent to RFR@bphc.org by Friday, December 20, 2025 at 5:00 PM ET.

BPHC requests that each response is thorough, complete, and addresses the specific instructions noted below.

The written RFI response must include the following information within the page limits noted below:

1. Vendor Profile (*no more than 1 page*), including:
 - a. Vendor name
 - b. Vendor official address

- c. Vendor proposal manager, including their contact information (e.g., email, phone number)
- d. If applicable, identify any relevant company certifications (e.g., if hold Certified Underrepresented Business Enterprise [CUBE] status)
2. Summary of Recommended Implementation Approach (*no more than 5 pages*)
 - a. Include a description and timeline of the high-level approach recommended for implementing an ERP solution that meets the requirements included in this RFI
 - b. Summary of past performance delivering functionality described in this RFI's requirements for organizations like the BPHC
 - c. This section should fully consider the background given in RFP Sections I and II about BPHC and its current ERP environment and how the degree of change from current to future state informs the Vendor's proposed approach and level of effort
 - d. It should also describe how the Vendor would coordinate a to-be-selected SW Vendor to effectively implement their solution to meet BPHC's requirements
3. Summary Assessment of Requirements (*no more than 3 pages*),
 - a. Based on the Vendor's experience provide perspective and recommendations on how modern ERP solutions meet BPHC's requirements included in *RFI Section IV*
 - b. Identify which requirements may prove more challenging to meet with modern ERP solutions and how to approach those accordingly in implementation, including any suggested supplemental software solutions to more fully meet BPHC requirements
4. Implementation Cost Estimate
 - a. Estimated implementation cost based on recommended implementation approach
 - b. Where necessary, note any key design decisions or variables and their associated effect on this cost estimates

BPHC understands that SI Vendors will likely need to make assumptions about its current state environment, intended requirements, and eventual selection of an ERP solution to respond to this RFI. At this stage, BPHC requests that SI Vendors state those assumptions and how different circumstances may influence their approach, cost, etc., within their RFI response.

Vendors currently on Commonwealth of Massachusetts Information Technology Statewide contracts can reference those contracts within their response.

Vendor Questions

Both SW and SI Vendors can submit their questions regarding this RFI by sending an email to RFR@bphc.org before Friday, November 22, 2024 at 5:00 PM ET.

Vendors should consolidate questions into a single, emailed submission with the subject being "ERP RFI Questions." This will help BPHC quickly review and address questions in a timely manner.

BPHC will review questions and plans to post responses by Wednesday, December 4, 2024 at www.boston.gov/bid-listings. BPHC will not respond directly to Vendor emails and any question submitted to that BPHC email address will be included in the distributed RFI Q&A document.

While BPHC does not anticipate this happening for the RFI, if a question causes a change to any part of this RFI BPHC will release an updated RFI along with the question answers. It is Vendors’ responsibility to review the updated documents to ensure their responses are compliant to the latest instructions and requirements.

RFI Schedule

Vendor questions and RFI response submissions should be completed per the instructions in this RFI and sent to RFR@bphc.org by the deadlines below.

Request for Information (RFI) Schedule*	
Wednesday, November 13, 2024	RFI published in The Boston Globe. RFI available at 10:00 AM ET at www.boston.gov/bid-listings .
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Wednesday, December 4, 2024	BPHC responses to Vendor questions posted by 5:00 PM ET at www.boston.gov/bid-listings .
Friday, December 20, 2024	Vendor RFI submissions due by 5:00 PM ET via email to RFR@bphc.org with the email subject being “ERP RFI Response.” BPHC will not respond directly to Vendor emails.

NOTE: This is the anticipated schedule. While it is BPHC’s intention to follow this schedule and conduct activities in a timely manner, unforeseen circumstances may arise that can affect it. If BPHC needs to make schedule changes, it will release that updated schedule in an amendment to this RFI at www.boston.gov/bid-listings.

RFI Response Evaluation

BPHC will not evaluate specific Vendors’ RFI submissions to either include or exclude those Vendors from participating in the planned Q1 2025 RFPs. Additionally, responses to this RFI will not directly result in a contract with BPHC.

BPHC will review Vendors’ RFI questions and submissions with the sole purpose of informing how it can best refine those Q1 2025 RFPs to successfully procure its ERP software solution and software implementation professional services.

Section IV – Notional BPHC ERP Modernization Scope

BPHC intends to invest in a modern ERP software solution to help make its HR/HCM and FIN business areas more streamlined, integrated, user-friendly, and adaptable to changing mission needs.

At a high level, that ERP solution will need to address the challenges BPHC currently faces with its current state environment, namely by:

1. Being a SaaS solution that is primarily supported by the SW Vendor, thereby removing the administrative burden of software fixes and upgrades and hardware maintenance.
2. Minimizing the number of separate, third-party applications, preferring fewer, well-integrated modules within a single solution for heightened usability and user experience.
3. Enabling enterprise-level workflows that default to automated process steps and real-time data integration across relevant business processes, allow for user-driven ‘no code’ modifications to adapt to business needs, and incorporate such necessary features as noncompliance flags, approvals, digital signatures, and incorporating electronic forms.
4. Integrating with external systems where required or desired, easing the current administrative burden entailed with certain HR/HCM and FIN processes (e.g., accounts receivable, third-party billing, grant management).
5. Enabling real-time, dashboard-based monitoring of HR/HCM and FIN data across the enterprise and quicken the ability to generate reports with that data.
6. Easing BPHC’s administration and maintenance of the solution through features such as easy-to-use administrative functionality, role-based permissions, integration to MS AD for single-sign-on, etc.
7. Allowing for user-driven ‘no code’ modification capabilities with readily available solution training for BPHC users to easily adapt and scale the solution as business needs change.
8. Supporting 24/7 access anywhere through both web-based and mobile-based access to all solution functionality.
9. Providing comparable protection to an on-premises-based solution, including the need to ensure confidentiality, integrity, availability, security, and privacy.
10. Enabling BPHC’s required ability to obtain, review, and document control assessment reports performed by a recognized independent audit organization, such as SOC 2 Type II audit report.

The tables below include more detailed BPHC functional, technical, and compliance requirements.

REMINDER: RFI Instructions for SW Vendor Responses

SW Vendors can complete this table in any format they choose, but it must include a response with the following information for each requirement listed:

- Requirement Item Name, Number, and Description
- “Yes” or “No” as to whether the SW Vendor’s solution meets the requirement

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- Any clarifying details the BPHC should know about that response (e.g., would require separate module or commonly integrated tool to meet requirement, would require basic or significant configuration changes, will be addressed by feature in upcoming product release)

General ERP Requirements

Requirement				Vendor Response	Addtl. Details
1. General	1.1 System General	1.1.1	System is a cloud-based Software as a Service (SaaS) offering.		
		1.1.2	Ability to provide a Service Level Agreement (SLA) with up-time of at least 99.9%.		
		1.1.3	Ability to create and report on organization levels directly tied to financial system organization levels, and report on employee and org level aggregation at the earn code, account code, object code, org code, etc., levels.		
	1.2 System Access	1.2.1	Ability to access and update system from any device (PC, Mac, tablet, phone) at any time (24/7 access) using any secure browser for self-service functionality for employees and managers, including viewing data and reports and performing critical tasks based on role and function, including but not limited to: employee recruiting and hiring, time tracking, and uploading documents.		
		1.2.2	Ability to access and update system from any device (PC, Mac, tablet, phone), at any time, using any secure browser for administrative functions, including security access management, system administration and configuration, report development, and master data entry and update.		
		1.2.3	Ability to provide a comprehensive audit trail that tracks logins, viewing of information and any data changes made, retaining old values. The audit trail needs to be accessible to reporting and timely export for forensics and analysis.		
		1.2.4	Ability to define role-based security for users and department/program users. Based on role, either in or across departments and programs, user may create, update, and view specific transactions and run specific processes. For audit purposes the username and date are associated with each transaction.		
		1.2.5	Ability to integrate and use MS Active Directory for enabling single-sign-on.		
		1.2.6	Ability to integrate with external applications and systems, both by single direction and bidirectionally based on need		
	1.3 Document Management	1.3.1	Ability to scan, upload, attach documents in varying formats (PDF, Word, HTML, excel, email) to person records (either individually, in batch, or as part of a workflow), and view them based on role and process. If the functionality in this section is not available, specify the ability to integrate in real time to another document management system.		

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		1.3.2	Ability to retain and archive (to an external system, removing the document from the transactional system) documents according to a ruleset by document type.		
	1.4 Interface	1.4.1	Ability to provide a modern, intuitive user interface with the ability to move between screens using either a mouse or keyboard.		
		1.4.2	Ability to create custom online forms for data collection that feed automatically with configurable workflow into the system upon completion.		
		1.4.3	Ability for end users to configure online profiles.		
		1.4.4	Ability to create/configure customized online help.		
		1.4.5	Ability to create custom forms		
	1.5 Communications	1.5.1	Ability to configure the preferred contact information, including for emergency notifications, to users, spouses, or preferred household contact.		
		1.5.2	Ability to send notifications and messages to individuals or groups based on dates, attributes, status, or event using email, text, letters, or social media, including but not limited to new hires, candidates not selected.		
		1.5.3	Ability to append communication to a person's record and create an audit trail of all notifications.		
	1.6 Data Management	1.6.1	Ability to create data fields and limit definitions as needed.		
		1.6.2	Ability to upload, index, store, and retrieve photos; or if this functionality is not available, to integrate with external photo database.		
		1.6.3	Ability to mandate required fields.		
		1.6.4	Ability to support field standardization and validation to prevent data entry errors/incorrect data from being entered into the system.		
		1.6.5	Ability to support the custom configurable auditing of fields to identify missing data and inconsistent data across fields.		
		1.6.6	Ability to support non-English characters and names.		
	1.7 Identity	1.7.1	Ability to manage unique identifiers, including a non-9-digit ID, managing and storing multiple ID types, ability to allow and limit searches and record retrieval on multiple ID types (including social security numbers), and to validate ID types at time of entry.		
		1.7.2	Ability to prevent the creation of duplicate IDs for the same individual, including between a person's role as a student, employee and external identity. The ability to identify, track, and merge records of the same individual if a duplicate id is created.		

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	1.8 General Person - Policy Concerning Name, Sex, Gender, and Other Personal Identity Information in University Records	1.8.1	Ability for individuals to update their personal information, including gender, preferred names, personal pronouns, titles, and legal and primary names, photos directly and in one place and without undue difficulty so that it will propagate across relevant systems.		
		1.8.2	Ability to support alternative and flexible gender types, including providing more than two options for gender/sex with at least one nonbinary option, making gender disclosure optional, and to support non-gender terms.		
		1.8.3	Ability to accommodate individuals who use a single name, who have more than three names, or who have names that cannot be classified as either a first or last name.		
		1.8.4	Ability to support personal pronouns with at least one nonbinary option and to make pronoun disclosure optional.		
		1.8.5	Ability to use primary names in all contexts except for instances where legal names are required by law or policy.		
		1.8.6	Ability to support honorifics/titles (e.g., Mr. Ms. Mx. Dr. etc.) with at least one nonbinary option and to make title disclosure optional.		
	1.9 Configuration and tenant management	1.9.1	Ability to limit access to each item of personal information (for example, legal name) to only those who need to know.		
		1.9.2	Ability to migrate objects and configurations from one tenant to another.		
		1.9.3	Ability to refine administrative system roles to ensure separation of duties and auditability.		
		1.9.4	Ability to access sufficient tenants for conversion, reporting, integration and implementation.		
2. Reporting	2.1 Reporting General	2.1.1	Ability to easily create tabular and analytic reports.		
		2.1.2	Ability to take an action directly from reports.		
		2.1.3	Ability to report against external data sources.		
		2.1.4	Ability to easily combine data from multiple parts of the system (e.g., HR/HCM and FIN Data) into a single report.		
		2.1.5	Ability to secure reports using transactional user profile access and role-based security.		
		2.1.6	Ability to export all ERP data (including employee data) in various formats (excel, pdf) for daily transactional reporting as well as complex, multi-level analysis in support of executive decision-making and institutional research objectives, in real time based on role.		

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	2.2 Dashboard	2.2.1	Ability to configure user interface to display relevant data from within multiple modules of the system on one screen based on role.		
3. Security	3.1 Security General	3.1.1	Ability to define role-based security for users and department/program users. Based on role, either in or across departments and programs, user may create, update, and view specific transactions and run specific processes. For audit purposes the username and date are associated with each transaction.		
		3.1.2	Ability to turn off employee access to all data and applications upon termination.		
		3.1.5	Ability to notify security administrator(s) of repeated unauthorized attempts to log into system or to access restricted data.		
		3.1.6	Ability to view/report on system's security setup, including which users are in which role and to which data and processes each role has access.		
		3.1.7	Ability to grant exceptions to role-based security, including either removing a user from access to data/a process granted to a role, or adding a user to a process/data not granted to the role the user is in.		
		3.1.8	Ability to see all workflows, actions, and other system functions under a person targeted for termination.		
		3.1.9	Ability to reassign workflow tasks from terminated employees.		
		3.1.10	Vendors are also required to submit a statement indicating that the vendor agrees to have an independent audit (SOC 2 Type II) performed annually and provide the report to BPHC.		

HR/HCM ERP Requirements

Requirement				Vendor Response	Addtl. Details
4. HR	4.1 HR General	4.1.1	Ability to create and reclassify positions.		
		4.1.2	Demonstrate position control as it relates to establishing budget level controls over positions.		
		4.1.3	Ability to move positions between organizations.		
		4.1.4	Change funding on the positions.		
		4.1.5	Integrated time keeping with payroll including adjustments, etc.		
		4.1.6	Ability to assign supervisors to Exempt and Non-Exempt employees.		
		4.1.7	Ability to move employees between organizations and the organizations assign based on attributes.		

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		4.1.8	Ability to create organization charts based on organizational hierarchy.		
		4.1.9	Robust Employee Self-Service based on various requirements.		
		4.1.10	Robust Manager Self-Service based on requirements.		
		4.1.11	Ability to create workflows and approvals that meet the needs of different organizations.		
		4.1.12	Ability to create notifications based on business needs.		
		4.1.13	Ability to start, stop and rescind business processes.		
		4.1.14	Robust and integrated reporting across all modules including finance as needed.		
		4.1.15	Ability to store and track position category (regular, part-time, seasonal, intern, student), department, FLSA status (exempt, non-exempt), job description, job title, job classification, and qualifications (minimum and maximum).		
		4.1.16	Ability to manage multiple union employees with different requirements, waiting periods, probationary periods, pay components etc.		
		4.1.17	Ability to have job profiles for both union and non-union workers.		
	4.2 Compensation	4.2.1	Ability to configure multiple types of compensation plans including salary, hourly, one-time payments, bonus etc.		
		4.2.2	Ability to tie compensation plans to job profiles.		
		4.2.3	Ability to pay shift differentials, holiday pay, and on call pay.		
		4.2.4	Ability to have pay flow seamlessly from HR to Payroll in an automated fashion with limited manual interactions.		
		4.2.5	Ability to have mass pay actions for merit, one-time payments, or retroactive pay with automatic adjustments in payroll.		
		4.2.6	Ability to manage multiple step progressions for eight current unions with limited manual interaction.		
	4.3 Recruiting	4.3.1	Ability to post a job and have an integrated approval for requisitions.		
		4.3.2	Ability to integrate with various job boards, LinkedIn, Handshake, etc.		
		4.3.3	Ability to create automated documents including offer letter, rejection letters, and have integrated documents signing capability.		
		4.3.4	Ability to have recruits flow through to the hire process in automated fashion.		
		4.3.5	Ability to have an automated connection to E-Verify for I9 Verification.		
		4.3.6	Ability to search candidate applications and resumes using keywords and ability to bring these candidates into another search.		

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		4.3.7	Ability for the system to provide background checks with the ability to check SSNs, degrees, and certifications, or to integrate with external product for background checks.		
		4.3.8	Ability to search candidate applications and resumes using keywords and ability to bring these candidates into another search.		
	4.4 Time and Absence	4.4.1	Ability to enter time through the web as well as punch in and out using time clocks		
		4.4.2	Ability to have dashboards, alerts, or notifications for incomplete time		
		4.4.3	Ability to manage multiple leave and time- off plans with automated accruals-based union requirements		
		4.4.4	Ability to support multiple types of leave (FMLA, STD/LTD, Worker's Comp. Faculty, Personal, Military, Parental, and Union), store leave balances, and track leave details such as leave status, start and end date.		
		4.4.5	Ability to store employee leave balances; track leave details such as leave status, start and end date; notify employees and managers when leave is at a threshold, and capture detailed data elements to track leave reasons, etc.		
		4.4.6	Ability to provide an integrated time and attendance tracking system that allows employees to readily access time tracking data via a portal and make swipe corrections online.		
	4.5 Payroll	4.5.1	Ability to manage multiple pay types with complex algorithms.		
		4.5.2	Ability to manage multiple pay schedules for union and non-union employees		
		4.5.3	Ability to manage multiple earnings and deductions codes for union and non-union employees		
		4.5.4	Ability to move employee time sheets information between city funds and grants as needed.		
		4.5.5	Ability to produce 1099 vendor W2s.		
	4.6 Talent and Performance	4.6.1	Ability to support performance management with electronic records and online expectations and the ability to print employee reviews for an organization.		
		4.6.2	Ability to support talent management that includes a learning management system or integrates with an external learning management system to plan for and track employee training.		
		4.6.3	Ability to enter (including ad hoc), manage, and track employee certifications (with associated expiration dates), credentials,		

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			competencies and skillsets, and other training to ensure that employees meet minimum job requirements.		
	4.7 Benefits	4.7.1	Ability to manage multiple benefits groups/populations.		
		4.7.2	Ability to integrate with the city for benefits elections.		
		4.7.3	Ability to flow benefits deductions automatically to payroll.		
		4.7.4	Ability to manage full time and part time changes in an automated fashion.		
		4.7.5	Ability to have automated approval flows for benefit changes.		
		4.7.6	Ability to post online documents, links, and help text throughout the enrollment process.		

FIN ERP Requirements

Requirement			Vendor Response	Addtl. Details
5. FIN	5.1 Accounting	5.1.1	Support BPHC compliance with Governmental Accounting Standards Board (GASB) standards.	
		5.1.2	Ability to have budget checks and commitment control.	
		5.1.3	Ability to have a complex chart of accounts based on multiple funding sources.	
		5.1.4	Ability to import financial data from various sources potentially through an integration.	
		5.1.5	Ability to have multiple hierarchies to facilitate city reporting.	
		5.1.6	Ability to integrate financial data to the City of Boston based on the city requirements.	
		5.1.7	Ability to have an integrated payroll costing system with robust reporting to support metrics.	
		5.1.8	Ability to manage the BPHC Purchasing Card (P-Card) program.	
		5.1.9	Ability to manage the BPHC Gift Card Program.	
		5.1.10	Ability to run and post indirect cost monthly on grants based on a actual expenses and the grant’s awarded IDC rate. (Unless IDC posts in real time in a new ERP system.)	
		5.1.11	Ability to easily prepare bank reconciliations and balance sheet account reconciliations across multiple bank accounts each with its own categorizing rules. Integration with P-Card software.	
	5.2 Procurement and Accounts Payable	5.2.1	Ability to have an integrated system for requisitions, purchase orders, and contracts.	

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		5.2.2	Ability to have separate workflow and approval processes for the different organizations (e.g., BPHC programs and bureaus).		
		5.2.3	Ability to receive order information into the accounts payable and asset module.		
		5.2.4	Ability for a vendor self-service portal: i. Registration and documentation collection ii. W-9 and certificate capture iii. Ability to code suppliers by commodity/service type iv. By diversity designation for mandated reporting		
		5.2.5	Ability for BPHC to set up new vendors and modify vendor information.		
		5.2.6	Specific user permission that authorizes a BPHC user to see and modify vendors' confidential bank information.		
		5.2.7	Ability to have automated approval flows based on dollar thresholds and roles.		
		5.2.8	Ability to store contracts and related documents integrated within the system.		
		5.2.9	Ability to mass de-activate vendors or archive vendors as needed.		
		5.2.10	Ability for one point of entry for invoices and be able to route the appropriate department in an automated way.		
		5.2.11	Ability for real-time budget checking before a purchase order number is issued to a requisitioner.		
		5.2.12	Ability to flag checks and balances where the payment doesn't match the purchase order.		
		5.2.13	Ability to integrate with Bank of America for P-Cards and payments.		
		5.2.14	Ability to manage high volume processing and multiple payments.		
	5.3 Accounts Receivable	5.3.1	Ability to bill advance grants and tied to the grants module and administered through that module.		
		5.3.2	Ability to integrate with our medical billing system, CareLogic.		
		5.3.3	Able to integrate with third-party billing vendors.		
		5.3.4	Ability to issue refunds in an automated fashion.		
		5.3.5	Ability to integrate with Emergency Management Services' billing system, DigiTech.		
		5.3.6	Able to bill our healthcare centers for training through the Chec program.		
		5.3.7	Able to administer permits or integrate with a permitting system HS Gov Tech to receive payments.		
		5.3.8	Ability to create ad hoc invoicing as needed.		

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		5.3.9	Ability to record non-cash donations as revenue and send an acknowledgement letter to donors.		
	5.4 Budgeting and Planning	5.4.1	Ability to track budgets in an integrated system using real time non personnel expense and payroll data.		
		5.4.2	Ability to easily reforecast budgets throughout the year based on a variety of different assumptions or models.		
		5.4.3	Allow for detailed tracking of individually budgeted staff positions across all cost centers, including part time and casual hourly staff.		
		5.4.4	Able to automatically track costing allocation changes based on changes in employee alignment.		
		5.4.5	Ability to have a budget check for expense reports, i.e., include system-driven budget adherence in all cost centers and disallow obligated costs if they will incur budget overages without prior approval.		
		5.4.6	Ability to adapt forecasts based individual program spending patterns rather than on a fixed spend down assumption.		
		5.4.7	Ability to have variable fringe benefit and indirect cost rates automatically included and calculated for budgeting and planning purposes, including estimates for unexpended commitments and obligations.		
		5.4.8	Ability to forecast pay associated with overtime and on-call/shift differentials in an automated way based on expected work patterns.		
		5.4.9	Allow for both commitments as well as obligations for contracts to accurately allocate anticipated budget usage.		
		5.4.10	Ability to budget for union costing including scheduled step progressions, longevity increases, location-based work differentials, and staggered cost-of-living-adjustments (COLA) applications.		
		5.4.11	Ability to request, approve, and process budget amendments across all cost centers in a way that does not slow down business practices.		
	5.5 Asset Management	5.5.1	Able to track capital and non-capital assets.		
		5.5.2	Ability to depreciate capital and non-capital assets.		
		5.5.3	Ability to report assets to the city as an expense.		
		5.5.4	Able to tag specific assets to specific grants as needed.		
		5.5.5	Able to have different people receive capital assets in different locations.		
		5.5.6	Ability to setup and track an asset as a “child” of another asset.		

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		5.5.7	Ability to conduct an annual inventory of tagged assets, and easily retrieve the purchasing backup documentation for each asset.		
	5.6 Financial Reporting	5.6.1	Ability to produce financial statements and financial dashboards as needed.		
		5.6.2	Ability to produce robust integrated reporting of financial data.		
	5.7 Grants Management	5.7.1	Ability to manage post award grants.		
		5.7.2	Ability to manage grant budgets over multiple years.		
		5.7.3	Ability to track outgoing grants.		
		5.7.4	Ability to bill for cost reimbursement grants, fixed price grants, fee for service grants, etc., and easily retrieve invoice backup documentation for payroll and expenses to remit to funder with invoice.		
		5.7.5	Ability to integrate with external funder templates.		
		5.7.6	Ability to produce progress reports and final financial reports for funders.		
		5.7.7	Ability to request and track the collection of Single Audit Report from subrecipients.		
		5.7.8	Ability to request, approve, and process cost transfers within the ERP system.		
		5.7.9	Ability to create the annual Schedule of Expenditures of Federal Awards (SEFA) report for the audited financial statements.		
		5.7.10	Ability to assign a unique indirect cost rate and a unique fringe benefit rate to each grant.		
		5.7.11	Ability to easily create and calculate the LOC draw documentation for federal funding.		
		5.7.12	Ability to setup and track a grant as a “child” of another grant.		
	5.8 Inventory Management	5.8.1	Ability to record, manage, tag, and track inventory.		
		5.8.2	Ability to ingest data from the Emergency Management Services (EMS) Operative IQ inventory management system to determine prepaid supplies at year end.		