

Q&A for Strategic Plan Implementation Support Services RFP

Answers Released August 17, 2026

Deadline for Proposals: August 24, 2026

A. Procurement Process, Proposal Requirements, and Eligibility

1. Given the breadth and complexity of the RFP scope, will the City consider extending the **August 24, 2026**, proposal submission deadline? If so, please provide the revised deadline.
 - a. No. The proposal submission deadline remains August 24, 2026, at 4:00 PM PST. No extension to the deadline will be granted.
2. May firms submit proposals for selected projects, workstreams, or individual components of a project area, or must proposals address the full enterprise-wide scope? Specifically, may firms propose for A4.1 consulting independently of A4 platform delivery?
 - a. Proposers may submit proposals for individual projects, any combination of projects, or the full scope of services. Each proposal must clearly identify the specific project(s) being addressed. Please note that firms may submit a proposal for A4.1 Consulting independently of A4 Platform Delivery.
3. Does the City anticipate a single award, separate awards by project area, or grouped awards for related projects? Will projects be evaluated and initiated independently or in phases?
 - a. The City does not have any expectations as to whether it will make a single award, separate awards by project area, or grouped awards for related projects; this will depend on the proposals received. Projects will be evaluated and initiated in phases within this fiscal year (August 2026 through June 2027) based on City priorities and resource availability.
4. May subcontractors or teaming partners perform substantial portions of a proposed project, provided their roles, responsibilities, and qualifications are clearly identified? If a prime contractor is required, does the City maintain a prime/subconsultant interest list or comparable process for specialized firms to connect with prospective prime bidders?
 - a. The City accepts proposals substantially utilizing subcontractors or teaming partners, provided that each partner's specific roles, responsibilities, and qualifications are explicitly detailed in the proposal. The City has no

preference on prime or subcontractor participation and does not maintain an interest list or vendor registry.

5. Must an out-of-state or foreign entity be registered and in good standing with the California Secretary of State by the proposal submission deadline, or only before contract execution if selected? Please also clarify what makes registration “applicable” and whether a City of East Palo Alto business license is required at proposal submission or before services begin.
 - a. An out-of-state or foreign entity must be registered and in good standing with the California Secretary of State and have an East Palo Alto business license before contract execution. All individuals and businesses operating, conducting business, or renting property within the City must obtain a business license; more information can be found at www.cityofepa.org/finance/page/business-license.
6. May resumes, Gantt charts, experience tables, and other supporting materials be included as appendices outside the Section V page limits?
 - a. Please refer to the requirements set forth in Section V of the RFP. All submittals, including resumes, Gantt charts, experience tables, and any appendices or supporting materials, are subject to and must fit within the maximum page count specified. Materials included beyond the page limits will not be evaluated.
7. May similar-project examples and references include work performed by proposed key personnel or subcontractors while employed by prior organizations, provided their roles and project details are clearly documented?
 - a. Yes. Similar-project examples and references may include work performed by proposed key personnel or subcontractors while employed by prior organizations, provided that the specific roles, responsibilities, and relevant project details are clearly documented in the proposal.
8. May the same key personnel and project references be used across multiple project areas where relevant?
 - a. Yes. Proposers are permitted to utilize the same key personnel and project references for more than one project area, as long as the submittal clearly demonstrates their relevant experience for each designated scope. If proposers choose to do this, however, they must state the number of hours

that key personnel will work on any one project or otherwise clarify if there are limitations to working on multiple projects at the same time.

9. May projects completed within the past five years that remain in active operation and maintenance qualify as similar projects?
 - a. Yes. Completed projects with ongoing maintenance qualify, provided they have been formally signed off within the last five years and are similar in scope to those defined in the RFP.
10. For GIS-related qualifications, may comparable federal, state, county, or municipal projects outside California be used where California local-government experience is preferred rather than mandatory?
 - a. Relevant GIS project experience from federal, state, county, or municipal jurisdictions outside of California will be accepted and evaluated. While California local-government experience is preferred, it is not a mandatory requirement.
11. Will the City conduct interviews or presentations by project area? Will interview and reference-check results affect the published 100-point evaluation score, or serve solely as due diligence? Following award, will the City provide individual scores, consensus scores, and/or written evaluation feedback?
 - a. Yes. The City intends to conduct interviews and/or presentations structured by project area following the initial proposal evaluation. The published 100-point evaluation scoring applies strictly to written proposal submissions. Reference checks will be conducted for finalist respondents. Information obtained from references will be evaluated on a 10-point scale. The Evaluation Committee reserves the right to deduct points from a finalist's overall proposal score or disqualify a respondent if reference responses demonstrate a history of poor performance, non-compliance, or project delivery failures on similar IT strategic planning engagements. After the contract award process is finalized, respondents may submit a request to receive their evaluation materials, including individual scores, consensus scores, and/or written evaluation feedback.
12. Is remote delivery acceptable for interviews, workshops, assessments, meetings, documentation, training, and project management, with onsite participation limited to specifically requested activities? If onsite work is anticipated, approximately how many visits should proposers include?

- a. The City permits remote execution for all standard project tasks—including meetings, interviews, workshops, assessments, deliverables, and training. However, for all projects, remote delivery must be completed within the continental United States for security purposes. Onsite attendance will only be required when explicitly requested by the City’s project manager. The exact number of onsite visits has not been finalized and will be determined during contract negotiations. For proposal pricing purposes, proposers should assume 3 onsite visits (such as project kickoff and final presentation/training). Any additional travel beyond this baseline will be handled on an as-needed basis subject to written City approval.
13. Should proposers remain vendor- and platform-neutral, or does the City have preferred vendors, platforms, or products under consideration for any project area?
- a. While some project areas are intended to be vendor- and platform-neutral, the City recognizes that for certain scopes, solutions may be proposed or delivered directly by the vendor who manufactures or owns the supporting product. The City does not mandate strict neutrality where product-specific solutions are appropriate but requires such disclosure.
14. Will consultants selected for assessment, strategy, or procurement-support work be eligible to compete for future implementation or follow-on phases?
- a. This will depend on the project and a conflict-of-interest determination. For example, the entity making an ERP recommendation will not be allowed to compete to implement that ERP, if so determined by the City. However, the City may request assistance from that entity in preparing the RFP and determining who will do the ERP implementation work.

B. General Budget, Scope, and Information Access

15. Unless expressly stated otherwise, should published project budgets be treated as all-inclusive amounts covering professional services, software and licenses, hosting, implementation, configuration, migration, training, equipment, and third-party costs, or should recurring and third-party costs be separately priced?
- a. Published project budgets should be treated as all-inclusive amounts covering all professional services, software and licenses, hosting, implementation, configuration, migration, training, equipment, and third-party costs for the initial contract scope. However, any recurring software, hosting, maintenance, or third-

party costs expected to start in Year 2 and beyond must be explicitly itemized and separately priced as a reference for future budget cycles.

Budgets were provided in part so proposers could understand the scale of the projects. In any one project, if the proposer thinks the job cannot be done with the listed budget or thinks adding something extra might be valuable to the City, please list that. The City will consider all helpful suggestions and may increase the budget on a project if we overlooked something critical.

16. For scope items stating that implementation will occur “once approved in writing,” should proposers include implementation labor and associated third-party costs within the stated project budget, or assume that implementation will be separately scoped, funded, and authorized after City approval?
 - a. Proposers must include all implementation labor and associated third-party costs within the stated project budget. The requirement for written approval serves as a formal project milestone sign-off prior to initiating implementation activities, not as a mechanism for additional or separate funding beyond the published budget.
17. For each project area, please identify the current vendor, consultant, or service provider; summarize the current operating model; and identify the principal operational pain points, service gaps, or performance concerns the City expects the selected consultant to address.
 - a. The City utilizes a mix of internal staff and specialized third-party solutions across the designated project areas (including Caselle, CivicPlus, ESRI, Office 365, Laserfiche). The primary purpose of this engagement is for the selected consultant to conduct a comprehensive assessment to uncover specific operational pain points, service gaps, and performance bottlenecks. A complete inventory of current agreements, software systems, and workflow documentation will be made available to the awarded consultant upon contract execution.
18. Will the City provide selected consultants access to relevant documentation and information, including contracts, inventories, workflows, policies, data samples, prior assessments, integration documentation, and applicable technical and security documentation?
 - a. Upon formal award and execution of the contract, the City will provide the selected consultant(s) with access to all relevant documentation and

information required to complete the scope of work. This includes available contracts, asset inventories, workflows, policies, data samples, prior assessments, integration specifications, and applicable technical and security documentation, insofar as those documents exist.

19. Are there anticipated grant-funding requirements, accessibility standards, cybersecurity requirements, data-residency restrictions, or records-retention requirements beyond those stated in the RFP?

a. There are no grant-funding requirements for this project, nor are any additional local requirements anticipated beyond those outlined in the RFP. However, the selected vendor will be required to comply with all applicable California state and federal statutory standards, including:

1. Accessibility: California Government Code Section 11135 and Section 508 / WCAG 2.1 AA standards.
2. Public Records & Retention: The California Public Records Act (CPRA, Govt. Code § 7920.000 et seq.) and City records retention schedule.
3. Cybersecurity & Data Residency: Standard California privacy laws and US-based data hosting requirements.

C. Project A1.1 — ERP Business Process Review and Caselle System Evaluation

20. Please describe the current Caselle environment, including modules and functions in use; whether payroll, human resources, and wastewater billing are included in the functional-assessment scope; version; hosting model; approximate user count; support agreement; and third-party products.

a. Currently, the City utilizes Caselle as a hosted SaaS solution exclusively for its Financial modules, as well as being licensed for Payroll and Payroll - Human Resources. Wastewater billing is not utilized. A third-party product, Revver, is also in use within the environment. Further details regarding exact user counts, specific versioning, support agreements, and full functional evaluations will be reviewed during the assessment scope.

21. Please identify current Caselle integrations, available interface diagrams, data-flow documentation, and technical specifications, as well as known reporting, workflow, data-quality, audit, internal-control, compliance, or other priority issues that should guide the assessment.

- a. The detailed technical documentation and operational background for Caselle—including existing integration specs, data flows, known reporting gaps, internal control notes, and compliance priorities—will be compiled and shared with the selected consultant following contract execution as part of the initial discovery phase.
- 22. Will the selected consultant receive relevant A1.1 materials, including the application inventory, integration documentation, prior departmental interview materials, Network and Security Plan documentation, prior assessments, workflows, contracts, policies, and supporting IT Strategic Plan materials?
 - a. Upon contract execution, the City will share all available and relevant project materials (such as system inventories, integration specs, interview records, prior assessments, contracts, policies, and strategic planning documents) that pertain to the defined scope of work. Network and Security Plan documentation is strictly outside the scope of this RFP and will be excluded from the provided materials.
- 23. Please identify the governance structure, executive sponsors, and decision-makers for A1.1, including approval of evaluation criteria, the alternative-system shortlist, final recommendations, and Caselle improvement actions. Please also identify expected participating departments and the approximate number of subject-matter experts and stakeholders.
 - a. This project receives direct executive sponsorship from the City Manager and Assistant City Manager. Primary stakeholder input will be gathered through interviews across six participating departments, involving approximately 15 individual interviewees. Please note that the purpose of this assessment is to evaluate the City's current operational environment and deliver vendor-agnostic recommendations
- 24. Should the consultant recommend the three alternative ERP systems for comparison, or does the City require specific vendors or platforms to be included? What level of participation should alternative ERP vendors provide, such as written responses, demonstrations, discovery interviews, product documentation, and nonbinding pricing?
 - a. The consultant should recommend three alternative ERP systems used by similarly sized California public-sector entities that meet the City's operational, regulatory, financial, and reporting needs; no specific vendors or platforms are required, provided the recommendations are well-supported

and relevant to comparable California municipalities. The consultant should assess implementation and ongoing costs for the three recommended systems. If ERP replacement is warranted, the consultant should also provide high-level recommendations on replacement readiness, key functional requirements, procurement considerations, implementation risks, and recommended planning next steps.

25. Should implementation and ongoing-cost comparisons use the five-year total-cost period referenced in the IT Strategic Plan, with any longer-term outlook provided separately?

- a. Although the IT Strategic Plan includes a dedicated project initiative to establish a comprehensive Total Cost of Ownership (TCO) model and chargeback framework, that specific model has not yet been formally established. The consultant should nevertheless provide comparative five- and ten-year cost projections for each recommended ERP system, including implementation, licensing or subscription, hosting, support, maintenance, upgrade, integration, and other material ongoing costs.

26. What workflow-documentation format and level of detail does the City expect—such as high-level process maps, cross-functional swimlanes, or BPMN—and approximately how many processes are in scope?

- a. The City expects vendors to propose the workflow-documentation format and level of detail that they determine best suited for capturing, analyzing, and delivering these business processes efficiently. Furthermore, identifying and defining the precise number of processes within scope will be part of the analysis performed by the consultant during the initial phase of the engagement.

27. Does the \$120,000 A1.1 budget include both the assessment and Part 2 implementation/optimization work, including Caselle professional services, configuration, reporting, integrations, and other third-party costs? If implementation is included, should the consultant make configuration changes directly or manage them through Caselle?

- a. It does not include any third-party costs, such as direct software licensing, third-party integration fees, or direct Caselle professional services/add-on modules. The consultant is not expected to make direct backend system configuration changes within the live Caselle environment. Instead, the consultant will lead the strategy, define functional/technical specifications,

design optimized workflows, and manage/coordinate implementation activities through Caselle.

28. What are the desired A1.1 start and completion dates, and are there FY 2026–27 budget, City Council, audit, payroll, wastewater-billing, or other operational milestones that may affect the schedule or staff availability?

- a. The desired start date for Project A1.1 is October 2026, with an estimated project completion date one year later in October 2027. Regarding operational milestones and constraints, proposers should account for limited staff availability during a portion of the November and December timeframe due to holiday schedules, end-of-year operational priorities, and mandatory financial reporting activities. The project schedule should incorporate appropriate flexibility during this period to ensure key stakeholders can participate fully in discovery, workflow reviews, and implementation milestones without impacting core City services.

29. If ERP replacement is recommended and approved, should the consultant prepare a complete ERP procurement package—including an RFP, evaluation framework, and procurement schedule—or only high-level procurement planning recommendations?

- a. The consultant will not be expected to prepare a complete procurement package under this scope. If an ERP replacement is recommended as a result of the assessment, the City will discuss internally to determine next steps regarding subsequent procurement, evaluation, and implementation planning.

30. Is direct Caselle experience required, or will comparable municipal ERP and business-process assessment experience be considered responsive?

- a. Direct Caselle experience is not required but preferred. Comparable experience conducting municipal ERP and business-process assessments for local government entities of similar size and complexity will be considered responsive.

D. Projects A4 and A4.1 — Website, Intranet, and Strategic Consulting

31. If one firm is selected for both A4 and A4.1, will a separate City strategic consultant participate in the information-architecture work, or will the selected firm perform both the strategic and technical-delivery roles?

- a. If a single firm is selected for both scopes, that firm will perform both the strategic and technical-delivery roles. Specifically, the project will follow a phased approach where the firm first executes Part 1 (A4.1 - Strategic Consulting) to complete the assessment, requirements definition, and information architecture, which will then be followed by Part 2 (A4 - Website/Intranet Platform) for technical implementation and deployment. In this scenario, no separate City strategic consultant will participate.
 - 32. Please identify the current website CMS, hosting provider, intranet platform, approximate website page count, estimated content and document migration volume, and any relevant content classifications.
 - a. The public website is hosted on CivicPlus (which acquired Municode) and, when last checked, consisted of approximately 5,526 unique pages alongside 4,506 file attachments. The City does not currently maintain a formal or structured intranet platform.
 - 33. Must the intranet be developed within the City's existing Microsoft 365/SharePoint environment, or may proposers recommend a separate platform?
 - a. The City is open to evaluating any intranet platform. Proposers may recommend solutions built within the City's existing Microsoft 365/SharePoint environment, co-hosted on an existing hosted website provider, or built using a separate platform altogether. Recommendations will be evaluated based on functionality, ease of maintenance, security, and total cost of ownership.
 - 34. Does the \$120,000 budget for A4/A4.1 include platform licensing, hosting, implementation, content migration, training, chatbot functionality, and ongoing support? If licenses are included, how many years of licensing should be assumed?
 - a. The \$120,000 budget for A4 is intended to cover all initial implementation items, services, and platform costs required for the current fiscal year (Year 1). Proposers should provide itemized pricing for Year 1 within this allocated budget, along with separate estimated budgetary amounts for ongoing licensing, hosting, and support for Years 2 and 3.
-

E. Projects A5.1 and A5.2 — GIS Assessment and Strategic Consulting

- 35. Should the cost proposal include separate pricing for Years 1, 2, and 3? Does the \$40,000 Year 1 budget cover both the initial GIS assessment and Year 1

consulting/implementation support, and what funding levels are anticipated for Years 2 and 3?

- a. The initial \$40,000 budget is intended to cover both the initial GIS assessment and Year 1 consulting/implementation support. As a separate line item, proposers can include itemized pricing for Years 2 and 3, as funding levels and requirements for subsequent years will be determined during the City's next budget cycle based on the outcomes of the initial assessment.

36. Please describe the current GIS environment, including platforms, user counts, data layers, integrations, and departments using GIS.

- a. Esri licensing is currently in use within the City, though active deployment and utilization are limited, as not all departments are leveraging the platform. Defining the full scope of the GIS environment—including precise user counts, active data layers, system integrations, and multi-departmental use cases—is a core objective of the initial project assessment phase.

37. Will the selected GIS consultant receive secure remote access to the GIS environment, system documentation, datasets, and appropriate departmental personnel?

- a. The selected GIS consultant will be provided secure remote access to the GIS environment, relevant system documentation, non-sensitive datasets, and key departmental personnel. All remote access will be granted in accordance with City IT security policies, requiring adherence to authentication, non-disclosure, and remote access protocols. Access to specific departmental staff will be coordinated and scheduled through the City's project manager.

F. Project S4 — Records Digitization

38. Please provide the estimated scanning volume, including pages, boxes, or cubic feet; involved departments; record formats; and current records- or document-management platforms.

- a. Estimated inventory: approximately 400 banker boxes, a 10-foot shipping container filled with banker boxes, multiple horizontal file cabinets, and unknown number of blueprints/plans. This citywide initiative spans all departments, with the goal of integrating materials into our current Laserfiche system or a vendor-recommended alternative. The full

determination and validation of exact volumes and legacy format across departments will be finalized as part of the initial discovery phase.

39. Will scanning be conducted onsite, offsite, or through a hybrid approach? Please identify any records that cannot leave City facilities, including confidential, sensitive, or law-enforcement records.

- a. Vendors may propose scanning services conducted onsite, offsite, or using a hybrid approach for non-confidential, non-sensitive and non-law enforcement items. However, a final determination regarding scanning location will be made during the discovery phase based on record sensitivity. Confidential, sensitive, and law enforcement records must remain onsite and cannot leave City facilities under any circumstances.

40. Does the \$50,000 annual S4 budget include scanning production, labor, equipment, conversion services, quality control, and project management, or only strategy, management, and quality-control services?

- a. Yes. The \$50,000 annual S4 budget is fully inclusive of all operations and services, including scanning production, labor, equipment, conversion services, quality control, and project management. It is not limited to strategy, management, and quality control.

G. Project A27 — Electronic Bidding, Procurement, and Contract Management

41. Does the City currently use an electronic bidding, procurement, vendor-registration, or contract-management system? If so, please identify the system or systems.

- a. No. The City does not currently utilize an electronic bidding, procurement, vendor-registration, or contract-management system.

42. Does the \$28,000 A27 budget include consulting, implementation, configuration, training, data migration, and the first-year software license?

- a. Yes. The \$28,000 A27 budget is fully inclusive of consulting, implementation, configuration, training, data migration, and the first-year software license.

43. Because the platform and license cost may not be known until evaluation is completed, how should proposers price the license component: as an allowance, pass-through cost, not-to-exceed amount, or another prescribed method?

- a. Proposers must treat the licensing component as a Pass-Through Allowance with a Not-To-Exceed (NTE) Cap. The overall project budget is capped at \$28,000, and the license cost represents a designated portion of this total amount. Vendors should itemize all remaining budget allocations across consulting, implementation, configuration, training, and data migration.