



**CITY OF EVERETT  
REQUEST FOR PROPOSALS  
ADDENDUM NO. 02**

**Date Issued: July 31, 2026**

**Project No.: AUD-27-06**

**Project Name:** Project Management Services for Acquisition of Municipal Financial Management Software

---

**NOTICE TO ALL BIDDERS**

This Addendum is issued to modify the Request for Proposals for AUD-27-06 Project Management Services for Acquisition of Municipal Financial Management Software. Below are all questions received by the published deadline. Questions have been consolidated where duplicative or overlapping.

**A. Info-Session Attendance Sheet**

The attendance sheet from the information session is provided for reference.

**B. Questions and Responses**

**Project Scope & Business Process Review**

**1. Please confirm the scope of the business process review, including City and School Department operations across Phase 1–3.**

**Answer:** Yes. The business process review will include all City and School Department financial and operational processes identified in the RFP across all phases, including General Ledger, AP, AR, Tax Title, Real Estate/Personal Property/Excise integrations, Purchasing, Budgeting, Cash Management, Grants, revenue posting, HR/Payroll and Permitting integrations, Parking, CAMA, Fixed Assets, reporting, and workflow refinements.

**2. Can the City provide an inventory of relevant business processes?**

**Answer:** Yes. An inventory will be provided during the selection phase.

**3. Does the City maintain process documentation, workflow maps, SOPs, or system documentation?**

**Answer:** The City maintains limited documentation. Additional materials will be provided as available.

**4. Will historical financial data be migrated or retained in read-only form?**

**Answer:** The City anticipates migrating required historical data and retaining non-critical legacy data in read-only or archived form. Final decisions will be made during implementation planning.

**5. Who is responsible for data cleansing?**

**Answer:** The City will perform data cleansing with guidance from the consultant and ERP vendor.

**Timeline, Go-Live Requirements & Readiness**

**6. What drivers support the June 30, 2027 Phase 1 go-live date?**

**Answer:** The date aligns with the start of FY2028 to ensure the City enters the new fiscal year with a modernized financial operating platform supporting budget development, operational planning, audit requirements, and financial close.

**7. Is the July 2027 go-live date flexible?**

**Answer:** The City prefers this timeline and has structured the RFP around it. However, the City is open to alternative approaches if vendor evaluations demonstrate that additional time would materially reduce project risk or improve implementation quality.

**8. Has the City conducted readiness assessments?**

**Answer:** The City has conducted internal planning and identified limitations in SoftRight. A formal readiness assessment has not been completed.

**9. Are there competing initiatives that may affect the timeline?**

**Answer:** Annual budget cycles, year-end close, and audit activities may affect scheduling. No major organizational changes are anticipated.

**Consultant Role, Staffing Model & Expectations**

**10. Will the City require one dedicated Project Director or a team?**

**Answer:** The City expects a dedicated Project Director/Lead Consultant supported by subject-matter experts as needed.

**11. Will the consultant perform hands-on activities (test scripts, UAT, etc.)?**

**Answer:** Yes. The consultant is expected to support hands-on activities consistent with project management, testing coordination, and implementation oversight.

**12. What level of staff participation can be assumed?**

**Answer:** The City will commit Finance, IT, departmental staff, and School Department personnel. Participation will vary by phase but will be prioritized during key milestones.

**13. Will the consultant support both procurement and implementation?**

**Answer:** Yes. The City anticipates awarding one contract covering ERP selection support and full implementation oversight.

**14. What level of support is expected during contract negotiations?**

**Answer:** Advisory support, pricing analysis, SOW review, and redlining assistance are expected.

**Qualifications & Minimum Requirements**

**15. Is municipal ERP experience mandatory?**

**Answer:** Municipal ERP experience is strongly preferred but not mandatory. Proposals will be evaluated based on demonstrated experience with ERP modernization projects, including work in municipal environments. Firms without municipal ERP experience will not be disqualified; however, municipal experience will be considered favorably in scoring.

**16. Is Massachusetts municipal finance familiarity mandatory?**

**Answer:** No. Massachusetts municipal finance familiarity is preferred but not mandatory. Comparable municipal finance experience from other jurisdictions will be considered.

**17. Can subconsultant or teaming partner experience be counted?**

**Answer:** Yes. Experience of named subconsultants or teaming partners may be considered in evaluating qualifications.

**18. Does the “3+ municipal ERP modernization projects” requirement apply to the firm, the Project Director, or the team?**

**Answer:** The City will evaluate the combined experience of the proposing firm, Project Director, and identified team members.

## **Current Financial System Environment**

### **19. Does the School Department use SoftRight?**

**Answer:** Yes.

### **20. Please provide the current version and configuration of SoftRight.**

**Answer:** This information will be provided to the selected consultant.

### **21. Identify functions supported through legacy processes or manual workarounds.**

**Answer:** SoftRight limitations include reporting gaps, manual reconciliations, workflow inefficiencies, integration gaps, and internal control concerns.

### **22. Provide an overview of systems integrated with SoftRight.**

**Answer:** Integration details will be provided during the selection phase.

### **23. Approximate number of users or licenses?**

**Answer:** Approximately 130 users.

### **24. Estimated transaction volumes?**

**Answer:** This information will be provided during the selection phase.

### **25. Number of users, departments, interfaces, years of historical data, and conversion volumes?**

**Answer:** Approximately 130 users and 25 departments. More information will be provided during the selection phase.

## **Governance, Project Management & Coordination**

### **26. Has the City established governance?**

**Answer:** Governance will include Finance, IT, Schools, and Administration. Final governance will be confirmed prior to implementation.

### **27. Will the consultant recommend a governance structure?**

**Answer:** Yes. The consultant is expected to recommend governance and decision-making structures.

### **28. Will the City assign a project manager?**

**Answer:** Yes.

## **Departments & Participation**

### **29. Provide a list of departments using the ERP.**

**Answer:** This information will be provided during the selection phase.

## **Delivery Model & On-Site Expectations**

### **30. Expectations regarding on-site or remote work?**

**Answer:** A hybrid model is acceptable. On-site presence will be required for key milestones.

### **31. Anticipated onsite cadence for the Project Director?**

**Answer:** To be determined collaboratively based on project needs.

## **ERP Selection Considerations**

### **32. Has the City decided on any ERP system?**

**Answer:** No.

### **33. Will the City publish written questions and answers or information from the July 21 session?**

**Answer:** Yes. All questions and answers are included in this Addendum.

### **Budget & Pricing**

**34. What is the budget for Project Management Services?**

**Answer:** The City will determine final pricing through negotiations with the highest-ranked proposer, consistent with the competitive procurement requirements of M.G.L. c. 30B.

**35. What is the budget for ERP implementation and licenses?**

**Answer:** The City will determine final pricing through negotiations with the highest-ranked proposer, consistent with the competitive procurement requirements of M.G.L. c. 30B.

**36. Is there an estimated budget range or level of effort?**

**Answer:** The City will determine final pricing through negotiations with the highest-ranked proposer, consistent with the competitive procurement requirements of M.G.L. c. 30B.

### **Proposal Submission Requirements**

**37. Six or seven hard copies?**

**Answer:** Seven (7) hard copies are required.

**38. Must Envelope 2 (price proposal) be submitted on August 5?**

**Answer:** Yes. Envelope 2 must be submitted with the proposal by the deadline.

**39. Can the proposal deadline be postponed?**

**Answer:** No. The deadline remains **August 5, 2026 at 12:00 PM**.

Bids must be received at Everett City Hall, Purchasing Dept, 484 Broadway, Room 14, Everett, MA 02149 on or before August 5, 2026 at 12:00PM. Timely delivery of a Bid to the location designated shall be the full and sole responsibility of Bidder.

This Addendum modifies and becomes part of the original bid documents for AUD-27-06 Project Management Services for Acquisition of Municipal Financial Management Software. All other terms and conditions of the Request for Proposals for AUD-27-06 Project Management Services for Acquisition of Municipal Financial Management Software remain unchanged. Proposers must acknowledge receipt of this Addendum with their submission.

**Kiara M. Freeman, MCPPO**

Chief Procurement Officer

City of Everett