

CITY OF SANTEE
REQUEST FOR PROPOSALS



Finance Department

FY25/26 RFP-40042

**Consultant Services for the Procurement of an
Enterprise Resource Planning (ERP) Program**

RFP Issued | August 11, 2025

Proposals Due | September 8, 2025 • 5:00 p.m.



**CITY OF SANTEE
REQUEST FOR PROPOSALS
CONSULTANT SERVICES FOR THE PROCUREMENT
OF AN ENTERPRISE RESOURCE PLANNING (ERP) PROGRAM
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1.0 INTRODUCTION

1.1 OVERVIEW

The City of Santee, hereinafter also referred to as “City”, is seeking proposals from qualified information technology consulting firms with proven experience to assist the City in the procurement of an ERP system.

1.2 SCHEDULE

The following schedule is anticipated for this RFP process:

Request for Proposals released:	August 11, 2025
Questions due to City for consideration:	August 25, 2025 by 5:00 p.m.
Proposals due:	September 8, 2025 by 5:00 p.m.
City staff review of proposals:	Beginning September 8, 2025
Interview of top firm(s) (City’s option):	Week of September 22, 2025
Anticipated award of contract:	October 8, 2025

1.3 PROPOSAL SUBMITTALS

Proposals must be received by 5:00 p.m. on Monday, September 8, 2025 and may be submitted via email to Jessica Clark, Senior Management Analyst at jclark@cityofsanteeca.gov or delivered to:

City of Santee
Attn: Jessica Clark, Senior Management Analyst
10601 Magnolia Avenue – Building 3
Santee, CA 92071-1222

1.4 RFP QUESTIONS

Any inquiries concerning this RFP must be submitted by August 25, 2025 to Jessica Clark, Senior Management Analyst at jclark@cityofsanteeca.gov or at (619) 258-4100 ext. 285. The above designated point of contact shall be the only person to field questions about this RFP.

2.0 BACKGROUND

2.1 DESCRIPTION OF GOVERNMENT

The City of Santee, incorporated in 1980, is located eighteen (18) miles east of downtown San Diego, and encompasses 16.7 square miles with over 60,000 residents. The City employs approximately 162 full-time staff members.

The City of Santee is a Charter City, which operates under the Council-Manager form of government. The City is responsible for providing a range of municipal services that include: fire and life safety services, street maintenance, traffic circulation, planning and community development, park and contracted landscape maintenance, code enforcement, public works, and recreation programs. Contracted services include law enforcement, city attorney, and animal control. Water and sewer service are provided by Padre Dam Municipal Water District and trash collection services are provided through a franchise agreement with Waste Management.

For fiscal year 2025-26, the City's total operating budget is \$69.7 million, and the Capital Improvement budget is a combined total of \$51.7 million in FY 2025-26 and 2026-27. The General Fund operating budget of \$64.0 million supports the main operations of the City including public safety, public works, engineering, planning and building services, recreation and community services and general administration.

Any changes to this RFP are invalid, unless specifically modified by the City and issued as a separate addendum document. Should there be any question as to changes to the content of this document the City's copy shall prevail. All addenda and notices related to this solicitation will be posted by the City on the City's website, accessible by the link below.

<https://www.cityofsanteeca.gov/departments/finance/bid-opportunities>

In the event this RFP is obtained through any means other than the City's website, the City will not be responsible for the completeness, accuracy or timeliness of the final RFP document.

2.2 DESCRIPTION OF DEPARTMENTS

Two key departments involved in this project, in addition to Information Technology, are:

Finance Department – The Finance Department consists of eight functional areas: Budget Administration, Accounting, Financial Reporting, Business Licensing, Purchasing, Payroll, Accounts Payable, and Accounts Receivable. The Finance Department is responsible for the collection and investment of City monies, accounting and financial reporting, budget preparation and administration including personnel budgeting, debt administration, long-range fiscal planning, grant reporting and fiscal compliance, purchasing, business licensing, payroll, accounts payable, accounts receivable, and capital asset inventory control.

Human Resources – The Human Resources and Risk Management Department is responsible for the City's recruitment and selection process, onboarding, classification and compensation plan, employee engagement and wellness program, open enrollment and benefits administration, safety, labor and employee relations, performance management process, employee training and development and risk management functions including liability and property insurance, workers' compensation, general liability claims, safety and loss control.

Notes:

1. The City of Santee is currently using Tyler Technologies Eden software for its financial management, budget preparation, financial reporting, payroll, and human resources functions. Business licensing is housed in Energov.
2. The City implemented Tyler Energov for its Integrated Land Management and Permitting System in August 2023
3. The City currently uses Tyler Cashiering for payments and integration with Tyler Eden. Tyler Cashiering is hosted on premise
4. The City is considering using a Sourcwell contract to award to Tyler Munis

Additional information regarding the City of Santee may be obtained from the City's web site at www.cityofsanteeca.gov.

3.0 SCOPE OF SERVICES

The City of Santee is seeking proposals from qualified information technology consulting firms to assist the City with the successful procurement of a financial system and human capital management system. The City is focused on using a Sourcewell contract to enter into an agreement with Tyler Munis. Any experience with implementing Munis, and the transition from Eden to Munis should be included. The planned scope of services includes assisting the City with the following:

1. Current process mapping for all financial and HR processes
2. Completion of a needs assessment/gap analysis and the development of system requirements
3. Evaluation of proposal received from Tyler Munis
4. Facilitate detailed demonstration of the vendor's system capabilities
5. Assist in contract negotiations

While implementation services, including troubleshooting and coordination with Tyler Munis, are not part of the scope of services for this RFP, they could be a consideration if staff determines that this type of assistance is needed.

4.0 PROPOSAL REQUIREMENTS

All of the items listed in this section (Section 4.0) must be submitted for the proposal to be considered complete.

4.1 Transmittal Letter

A signed letter of transmittal briefly stating the Proposer's understanding of the work to be done, the commitment to perform the work according to the identified timeline, and a statement why the firm believes it to be the best qualified to perform the Scope of Services.

4.2 Title Page and Table of Contents

Title page should include the request for proposals subject; the firm's name; the name, address and telephone number of the contact person; and the date of the proposal.

4.3 Technical Information

This section should demonstrate the qualifications, competence, capacity, and resources of the firm seeking to perform work for the City in conformity with the requirements of this request for proposals. As such, the substance of proposals will carry more weight than their form or manner of presentation. The information provided should demonstrate the qualifications of the firm and of the particular staff to be assigned to this project. It should also specify methodologies and approach that will meet the request for proposals' requirements.

While additional data may be presented, the following information must be

included:

4.3.1 Firm Qualifications and Experience

State the size of your firm, the location and size of the office from which the work on this project is to be performed and the number and nature of the professional staff to be employed with this project.

If the Proposer is a joint venture or consortium, the qualifications of each firm comprising the joint venture or consortium should be separately identified, as well as the percentage of services provided by each party, and the firm that is to serve as the principal consultant should be noted, if applicable.

4.3.2 Staff Qualifications and Experience

Provide the names, title, and qualifications (resumes) of the proposed project manager, key staff and any subcontractors who will be conducting the work on this assignment, including their experience and projects in which they had “hands on” responsibility and length of time with the firm. The project manager will be expected to be fully involved and conversant in the details of the project on a day-to-day basis. Describe the organization structure of staff members and sub-consultants (if any).

4.3.3 Similar Engagements with other Government Entities

Provide a list of at least five (5) public agencies that are comparable to the City of Santee for which the Proposer has recently provided services similar in scope to those included in this request for proposals. The reference list should include:

- Agency
- Description of the engagement
- Name of an agency point of contact (POC)
- Agency POC phone number
- Agency POC email address

4.3.4 Project Approach

The proposal should set forth a specific work plan and project approach, including:

- a) A detailed timeline for action from contract execution through the Scope of Services as described in Section 3.0.
- b) Proposed segmentation of the project.

Note: If Proposer believes additional tasks are advisable, such tasks / services should be clearly identified in the proposal, including cost.

4.4 Cost Proposal

The cost proposal must contain a specific “not to exceed” fixed fee for all direct and indirect costs, including, but not limited to, all out-of-pocket expenses (e.g. printing costs, travel, etc.). Each phase, if applicable, should have an itemized budget including labor costs and expenses. Hourly labor rates should be identified for any optional services or additional tasks beyond those included in the Scope of Services.

5.0 EVALUATION AND SELECTION PROCESS

Proposals submitted will be evaluated by a committee consisting of City staff. During the evaluation process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarifications from Proposers.

The selection process will involve the evaluation of submitted proposals for compliance with the requirement of the RFP and on the basis of the selection criteria, therefore Proposers must initially represent themselves solely by their written proposals. At the discretion of the City, interviews may be requested of those firms considered most qualified for this contract as part of the selection process. Based on the results of the selection process, the committee will recommend a firm to the City Council for contract award.

Upon approval of the City Council, an Agreement for Professional Services shall be executed in a form substantially the same as attached hereto as Exhibit A. **Please note the key terms included in this agreement. Your proposal must indicate if you do not agree with any provision included in this agreement.**

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City and the firm selected. There is no expressed or implied obligation for the City to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

6.0 EVALUATION CRITERIA

Selection of the Consultant shall be based on the following criteria:

- a) Quality and completeness of the Proposal.
- b) Proposer's professional qualifications and experience with engagements of similar scope and complexity, including the experience of staff to be assigned to this project.
- c) Thoroughness of the Proposer's work plan / project approach.
- d) Cost effectiveness of the Proposal compared to the requested scope of work.

Note: Cost, while a consideration, will not be the overriding factor for award.

7.0 GENERAL CONDITIONS

This Request for Proposal (RFP) does not commit the City of Santee to award a contract, to defray any costs incurred in the preparation of a proposal, or to procure or contract for services. The City reserves the right to accept or reject any or all proposals received in response to this request, to negotiate with any qualified source, or cancel in whole or in part this RFP if it is in the best interest of the City to do so.

Subsequent to contract negotiations, prospective firms may be required to submit revisions to their proposals. All firms submitting a proposal should note that the execution of any contract pursuant to this RFP is dependent upon the recommendation of the City selection committee and the possible approval of the Santee City Council.

7.1 **Public Records**

All proposals submitted and information included therein shall become the property of the City of Santee and public records, and as such may be subject to public review.

7.2 **Addenda**

Any changes to this RFP are invalid unless specifically modified by the City and issued as a separate addendum document. Should there be any question as to changes to the content of this document; the City's copy shall prevail.

7.3 **Equal Opportunity**

The City endeavors to do business with firms sharing the City's commitment to equal opportunity and will not do business with any firm that discriminates on the basis of race, religion, color, ancestry, age, gender, sexual orientation, disability, medical condition or place of birth.

7.4 **Right to Cancel**

The City reserves the right to cancel, for any or no reason, in part or in its entirety, this RFP including but not limited to: selection schedule, submittal date, and submittal requirements. If the City cancels or revises the RFP, all Proposers will be notified in writing by the City.

7.5 **Conflict of Interest**

The City complies with all California statutes and regulations related to conflicts of interest.

7.6 **Insurance Requirements**

The City requires consultants doing business with it to obtain insurance as shown in the standard Agreement for Professional Services. The required insurance certificates must comply with all requirements of the standards as shown in this Agreement and must be provided (original copy) within fifteen (15) days of notice of selection and prior to the commencement of the work.

7.7 **Business License**

The selected firm will be required to obtain a Santee business license upon award of the contract. Current cost: \$112.00 for initial license (valid for one year); \$44.00 for annual renewal.