

ADMINISTRATION RECOMMENDATION/REPORT

The administration recommends that the Board of Trustees approve a contract with Anaplan, Inc. for budget software services for the budget control department.

BACKGROUND

The current budget process includes several manual operations, leaving room for errors which can cause delays throughout the process. The College also lacks a robust forecasting tool for modeling various future scenarios and determining long-term effects of current decisions.

Request for proposals #20-17 was issued to procure budget software services. Ten responses were received and evaluated by a team with representatives from the budget control, business office, human resources, and information technology services departments who determined the proposal submitted by Anaplan Inc. will provide the best value to the College.

IMPACT OF THIS ACTION

The budgeting software tool will be used to create the annual budget, will provide a platform for robust what-if scenarios, and will be the source of each fiscal year's budget book. In addition, streamlined budget versus actual reports, drill-down capabilities, and summary graphs and charts will be available throughout the year to support decision-making by the College's budget managers.

BUDGET INFORMATION (INCLUDING ANY STAFFING IMPLICATIONS)

The estimated expenditure, pending successful contract negotiations, is \$200,000 for implementation services and the initial year subscription access, and \$89,000 annually for each subsequent year. This expenditure will be funded from the vice chancellor of fiscal affairs department's 2019-2020 operating budget and subsequent year budgets.

MONITORING AND REPORTING TIMELINE

The initial two-year award term will commence on April 7, 2020, with renewal options of three one-year terms.

ATTACHMENTS

Attachment 1 - Tabulation

RESOURCE PERSONNEL

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ATTACHMENT NO. 1

**RFP 20-17 Budget Software Services
Evaluation Summary**

Stated Criteria	Maximum Value	Anaplan, Inc.	Clarity Partners, LLC	Delbridge Solutions	EPM Intelligence, LLC	Holland Parker	Jedox, Inc.	Kaufman, Hall, & Associates	Prophix Software, Inc.	Questica Ltd.	Sirius Computer Solutions
Understanding of the project scope and ability to meet specifications	100	82.00	85.00	73.00	58.00	72.00	Non-Responsive	91.00	Non-Responsive	80.00	63.00
Qualifications and experience of firm and personnel	100	80.00	85.00	78.00	54.00	61.00		81.00		78.00	52.00
Customer service	50	36.00	40.00	30.00	28.00	36.00		40.00		38.00	29.00
Overall completeness and clarity of responses to Attachment A, Budget Software – Scope & Specifications Requirements	50	44.00	37.00	31.00	32.00	33.00		40.00		37.00	30.00
Price proposal	100	100.00	33.00	86.50	27.15	0.00		69.50		97.50	42.50
Proposer's financial responsibility	50	37.50	50.00	0.00	0.00	0.00		0.00		0.00	0.00
Subtotal (90 Points x 5 Evaluators)	450	379.50	330.00	298.50	199.15	202.00	-	321.50	-	330.50	216.50
Oral and visual presentations for top-ranked firms (10 Points x 6 Evaluators)	60	51.10	52.00	-	-	-	-	52.60	-	51.55	-
Grand Total	510	430.60	382.00	298.50	199.15	202.00	-	374.10	-	382.05	216.50

Final Ranking

	Vendor Name	Total Score
1	Anaplan, Inc.	430.60
2	Questica Ltd.	382.05
3	Clarity Partners, LLC	382.00
4	Kaufman, Hall, & Associates	374.10
5	Delbridge Solutions	298.50
6	Sirius Computer Solutions	216.50
7	Holland Parker	202.00
8	EPM Intelligence, LLC	199.15
9	Jedox, Inc.	-
10	Prophix Software, Inc.	-