



July 22, 2026

**Proposal for Consulting Services for an
Enterprise Resource Planning (ERP) System**

Ventura County Transportation Commission

Submitted By:

Eide Bailly LLP

Bradford Rockabrand, CPA, CIA
Partner

1. Cover Letter

Meeting Your Needs with Proficiency

Thank you for the opportunity to continue to support the Ventura County Transportation Commission (VCTC) in achieving your goals through providing Enterprise Resource Planning (ERP) System Consulting Services. We understand that today's business environment demands more than just technical expertise — it requires a partner who listens, adapts, and delivers value that aligns with your vision for success.

Statement of Understanding and Acknowledgement

Eide Bailly understands that the VCTC requested a proposal to provide ERP System Consulting Services, specifically procurement services which will be delivered in the following phases:

- **Phase I – RFP Coordination**
- **Phase II – Vendor Evaluation and Selection**

The undersigned confirms that our firm is fully prepared to meet the requirements of each phase and is committed to delivering objective, high-quality consulting services that align with the VCTC's goals.

Statement Regarding Software Sales

Although Eide Bailly can sell, implement, and support software, Eide Bailly would not participate in the ERP RFP process resulting from this scope of work and therefore affirms that Eide Bailly would not profit from the selection of the ERP selected by the VCTC. The Government Advisory Services Department is solely focused on providing objective and unbiased government consulting services. We understand sensitivities to potential conflicts of interest or biases that may arise from contracting with firms whose business involves product sales. Although firms engaged in such sales are not precluded from responding to VCTC's RFP, we believe our independence from product sales enhances our ability to deliver impartial and client-focused recommendations.

Our Capabilities

Our Government Advisory Services team brings extensive experience in local government consulting, with a strong track record of guiding government agencies through successful software evaluations, procurements, and implementations. We have partnered with municipalities and special districts to assess operational needs, develop tailored RFPs, manage vendor selection processes, and support software implementation. Our consultants are well-versed in the unique requirements of government operations such as finance, payroll, human resources, utility billing, and others.

We understand the complexities of local government procurement and have successfully supported local government clients in navigating these processes while delivering results that align with their mission and budget. Our approach combines deep technical knowledge with a collaborative, service-oriented mindset, ensuring that each engagement is tailored to the client's goals and operational realities.

	Contant Information	Office Location
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Why Choose Eide Bailly?

In selecting Eide Bailly, VCTC will gain a trusted partner with a deep understanding of the project's goals, a proven track record in ERP transitions, and a commitment to delivering exceptional client service. Our experience guiding local government agencies through an ERP transition ensures that we bring practical insight and strategic foresight to every phase of the engagement. From conducting developing a Request for Proposals (RFP) to facilitating vendor evaluations and contract negotiations, our Government Advisory Services team is equipped to support VCTC with precision and professionalism.

We are prepared to meet your timelines, tailor our approach to your operational needs, and provide continuity through a dedicated team that understands the unique challenges of local government. Eide Bailly is ready to help VCTC make a confident, informed decision, and lay the foundation for long-term success.

The following pages highlight our firm's strengths and solutions that we can provide VCTC. You will be a highly valued client, and we would be proud to work with VCTC, building a trusting relationship with your team. Please contact me if you would like to discuss any aspect of this proposal. **Let us build something strong — together.**

Sincerely,



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3. Key Staff

Your Goals, Our Commitment

Statement of Qualifications of the Proposed Project Team

Our team has deep experience with technology assessments, requirements analysis, system selections and implementation projects, interfaces, project management, process improvement projects, and knowledge of best practices and change management when implementing solutions. Our consultants utilize various and proven methodologies, along with their years of experience and knowledge of best practices, to assist clients with the services you are requesting. The team is skilled in the areas you have identified, specifically: software assessment, comprehensive project management, process analysis, process improvement, needs identification, requirement definition, RFP drafting, software selection guidance, contract negotiation, and implementation support.

Each team member is committed to this engagement from inception through completion. Our proposed team has direct experience in municipal government, management consultancy, and ERP projects. This expertise ensures that VCTC will benefit from practical insights and effective methodologies at every phase.

Our consultants have successfully delivered numerous engagements similar to the services requested, supporting clients with leading ERP systems such as Tyler Technologies, Oracle, Workday, Caselle, and Springbrook.

Team Continuity

We propose keeping the same team in the same roles for this additional work.

- **Shelley Earsley and Bradford Rockabrand** will oversee the project as the **Engagement Partners** and **Bradford** will be your **Partner In-Charge** and have overall responsibility for the project.
- **Michael Gomez** will lead the project and be your **Project Manager** and main point of contact.
- **Marina Names** will support the project by providing subject matter expertise in finance operations and work closely with Michael to complete all tasks and deliverables.
- **Joe Tillman** will support the project as an additional resource as-needed.



4. Proposed Scope of Services

Project Understanding

VCTC seeks a qualified consultant to guide the selection and implementation of a comprehensive ERP system. The project is divided into two phases:

Phase I – RFP Coordination

- Provide project management and coordination support for the RFP process, including managing the procurement timeline, coordinating key activities, and supporting VCTC staff through the release and vendor response period.
- Support RFP administration activities, including vendor communications, question-and-answer coordination, pre-proposal meeting support, addenda assistance, and related activities necessary to manage a clear and organized RFP process.

Phase II – Vendor Evaluation and Selection

- Coordinate pre-proposal activities by identifying vendors, managing and assisting with RFP questions and answers, facilitating a pre-proposal meeting, and working with VCTC staff on any RFP addenda.
- Review and screen proposals for responsiveness and completeness against mandatory items requested in the RFP, and prepare results for VCTC staff.
- Coordinate evaluations through developing a scoring matrix, identifying questions, compiling evaluator scores, and drafting a summary for review and discuss with VCTC staff.
- Facilitate vendor demonstrations by scheduling the sessions, draft demonstration scripts, and develop a scoring matrix.
- Assist with reference checks by researching vendor market presence, and develop reference check questions.
- Facilitate final vendor selection and participate in contract negotiations.

Project Approach

Eide Bailly is proposing a project team who will work collaboratively with VCTC staff to ensure successful ERP transition. Our procurement consulting process is comprehensive yet flexible so it can meet the needs of VCTC, which includes being onsite with staff during certain tasks of the project. Our task approach ensures all important aspects of the project are completed (e.g., project management, request for proposal, multiphase evaluation, scripted demonstration, vendor contracting, other). Our team's combination of practical government

experience, coupled with ERP consulting experience, informs our approach and enables us to reach depths that may not be reached without both experiences.

Phases

Eide Bailly proposes Phase I and Phase II to be completed over a 6-month project timeline. The project is expected to begin in September 2026 and be complete in February 2027.

Onsite versus Offsite

Eide Bailly believes that strong relationships and open communication are important for project success. We believe that being onsite during certain activities help build strong relationships and open communication. Our proposal includes our team being onsite for Functional Fit Demonstrations. However, we have successfully completed projects remotely using collaboration tools like Microsoft Teams, Zoom, and other information sharing sites. Though we have a preference for periodic onsite work, we will work with VCTC to determine the best balance of onsite and offsite work to complete the project.

Staff Involvement

VCTC staff involvement in the project will require several roles to be provided. A project sponsor/director, a liaison to work frequently and directly with Eide Bailly, subject matter experts (staff from departments and divisions), and IT/technical support. VCTC can expect to be involved in every phase and task, but staff involvement to be the most during tasks 3, 4, and 5.

PHASE I – RFP Development

Task #1 – Initiate & Project Management

This task will establish the foundation of the project and include planning, communication expectations, and formally kicking off the project.

Key Tasks Include:

- **Project Planning Meeting:** Eide Bailly will facilitate a meeting with the VCTC's project leadership. Review of the project scope, stakeholders, deliverables, work plan and status report, and other items will ensure open communication and a well-planned project.
- **Work Plan and Status Report:** Eide Bailly will prepare a work plan and status report based on the project scope and include deliverables, estimated completion date of tasks, estimated percentage of task completion, key decisions, issues, risks, and various noteworthy comments to ensure project transparency.
- **Request Documentation:** Eide Bailly will provide a list of documents to help familiarize our project team with VCTC's policies, procedures, practices, and reports. This will help make subsequent tasks and meetings more efficient.
- **Kickoff Meeting:** Eide Bailly will prepare a PowerPoint presentation that communicates the project, its goal, roles, responsibilities, tasks, and timeline to all staff involved in the project.

Key Deliverables Include:

- Work Plan.
- Status Report.
- Documentation request list.
- Project kickoff PowerPoint.

Task #2 – RFP Coordination

This task focuses on managing pre-proposal activities by identifying potential ERP vendors, assisting with the review of vendor submitted RFP questions, drafting answers to questions, facilitating a pre-proposal meeting, and assisting VCTC staff with any addenda.

Key Tasks Include:

- **Potential Vendor List:** Using all the information gathered from the previous phase and tasks, Eide Bailly will identify software vendors that have the potential to meet the system requirements desired by VCTC.
- **RFP Meeting and Questions:** Eide Bailly will lead a meeting for interested ERP vendors. The meeting's purpose is to provide information about VCTC and the RFP so that the ERP vendors can prepare their best proposal for VCTC. Eide Bailly will also assist with reviewing and providing draft responses to vendor questions and issuing addenda for VCTC staff consideration.

Key Deliverables:

- ERP vendor list.

PHASE II – Vendor Evaluation and Selection

Task #3 – Evaluation

This task is the beginning of a multi-step evaluation process that will result in the best fitting ERP for VCTC. Eide Bailly's evaluation process focuses on "what" and "how". Evaluating the vendor proposals is the first step and focuses on "what" the vendor ERPs can do. Through careful evaluation and detailed examination of vendor proposals, VCTC will gain the information needed to select vendors to participate in functional fit demonstrations.

Key Tasks Include:

- **Evaluation Support:** Assist with all processes associated with the evaluation of the ERP. This may include advice and guidance based on our experiences completing similar projects, reasonableness of vendor proposal schedules, implementation plan, and other documents.
- **Evaluator Prep:** Prepare the evaluators for review and examination of the vendor proposals.
- **Evaluation Assistance:** Complete proposal responsiveness. This includes compliance with the RFP, and review of the scope, system requirements, implementation plan, cost, issues, risks, and other items, and prepare a summary of the review for VCTC staff.
- **Evaluation Coordination:** Gather, analyze, and prepare a summary of VCTC's evaluators scoring for the proposals. Prepare a summary of the vendor proposed cost for implementation services, annual subscription, annual support/maintenance, and other items.
- **Vendor Shortlist Selection:** Coordinate and facilitate a shortlist vendor selection meeting. Clarify items or questions directly with the ERP vendors from the evaluation process. This meeting will result in selected vendor(s) participating in functional fit demonstrations.

Key Deliverables Include:

- Proposal evaluation criteria, memo, and selection documents.
- Proposal cost summary.
- Proposal scoring matrix.

Task #4 – Functional Fit Demonstrations

This task is the end of a multi-step evaluation process that will result in the best fitting ERP for VCTC. Eide Bailly's evaluation process focuses on "what" and "how". Evaluating the vendor demonstrations is the second step and focuses on "how" the vendor's ERP accomplish what their proposals said they can do and "how" they accomplish what VCTC needs. Through careful evaluation and detailed examination of vendor demonstrations, VCTC will gain the information needed to select a vendor to enter contract negotiations.

Key Tasks Include:

- **Prepare Functional Demonstration Scripts:** During meetings, discussions, plans, and analysis, Eide Bailly will note important functionality for VCTC. Eide Bailly will draft demonstration scripts for common processes and important functionality. Each vendors software will likely be able to accomplish similar tasks but will vary in “how”. This is where “fit” comes into the evaluation. The goal of the demonstration scripts is to provide VCTC with scenarios that can measure the vendor’s ERP ability to accomplish tasks and how well the process fits into VCTC’s goals.
- **Evaluator Prep:** Prepare and coordinate the evaluators for review and examination of the demonstrations.
- **Demo Participation:** Attend and facilitate the vendor demonstrations.
- **Evaluation Coordination:** Gather evaluations and prepare a summary of the evaluations.
- **Vendor Selection:** Coordinate and participate in a final vendor selection meeting.

Key Deliverables Include:

- Demonstration scripts.
- Demonstration scoring matrix.

Task #5 – Contracting

This task will include reviewing the vendor’s contract, providing clarifications, revisions, and participation in negotiations. The goal is to obtain a well understood and favorable contract for VCTC.

Key Tasks Include:

- **Contract Review:** Assist with review of the vendor contracts. Identify terms, statements, and other items that VCTC should bring to the vendor for contract revisions.
- **Negotiation Assistance:** Assist as needed with negotiation meetings.
- **Contract Language Assistance:** Assist as needed with proposing language for the contract.

Key Deliverables Include:

- A draft contract with negotiation revisions.



5. Proposed Schedule

We understand your requested timeline and are committed to meeting your deadlines. We will work closely with your team through the Initiate and Project Management task to clearly define expectations.

We begin each engagement with a strong understanding of the phases and tasks to meet these deadlines. A project plan will be developed between VCTC and our team and then followed closely. As needed, we will work with VCTC’s management team to customize our services and specific timelines to your needs. We believe in clear, up-front, and open communication with no surprises.

Phase I and Phase II

The project schedule is very much in control of VCTC and Eide Bailly up to the point of scheduling Functional Fit Demonstrations. ERP vendors schedule demonstrations weeks or months in advance for demonstrations. Because of this, and VCTC’s staff availability during that time, it is possible that the project could take longer than anticipated. This can be mitigated to an extent by timely completion of tasks leading up to the demonstrations, but the ERP vendor’s availability will be a factor out of the control of VCTC and Eide Bailly.

The following table identifies the structure of our proposed schedule and the timing of each task:



7. Cost Proposal & Contract Exceptions

Expected Fees

Our fees are based on the complexity of the issue and the level of expertise required by our team members to effectively address it. If you request additional services, we will obtain your agreement on fees before commencing work.

The services proposed for Phases I and II are offered at the same rate as our original agreement, an hourly rate of \$275. The hourly rate is based on time and materials. The services and hours proposed for Phase I and II will be spread across the proposed project team, and it is expected that Michael Gomez will provide services for most of the hours proposed.

Engagement Services and Fees	Hours	Rate	Cost
Phase I – RFP Development			
Task 1: Initiate and Project Management	32	\$275	\$8,800
Task 2: RFP Coordination	12	\$275	\$3,300
Subtotal	44		\$12,100
Phase II – Vendor Evaluation and Selection			
Task 3: Evaluation	61	\$275	\$16,775
Task 4: Functional Fit Demonstrations	70	\$275	\$19,250
Task 5: Contracting	10	\$275	\$2,750
Subtotal	141		\$38,775
Grand Total	185		\$50,875

Out-of-Pocket Fees

The professional fees listed above are inclusive of all out-of-pocket expenses and you will not be billed for expenses such as travel time, mileage, and meals.



The Right Choice for Ventura County Transportation Commission

Exceeding Expectations and Achieving Goals

For us, work goes beyond mere tasks; we view it as an opportunity to assist you in addressing challenges, reaching objectives, and following your passions. After carefully assessing your requirements and investing time in understanding your organization, we believe we are an ideal fit for this opportunity.

We are committed to being responsive, reliable advisors and would be glad to answer any questions as you evaluate next steps. We want to make sure you have everything you need to make your decision.

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We Want to Work with You

Our goal objective is simple: to help you move forward with confidence. Whether it is protecting what you have built, improving performance, or uncovering new ways to grow, Eide Bailly is here to offer thoughtful support and practical solutions. We look forward to working with you.