
DATE: September 13, 2013

REPORT TITLE: **TECHNOLOGY SOLUTION FOR INTEGRATED PLANNING - DOCUMENT 2013-426P**

FROM: Norma Trim, Chief Financial Officer and Commissioner of Corporate Services

RECOMMENDATION

That the contract (Document 2013-426P) for the supply and implementation of the technology solution to improve budgeting, analysis, modeling and reporting capabilities be awarded to Biond Consulting in the estimated amount of \$3,794,610.23, excluding applicable taxes, in accordance with Purchasing By-law 63-2008.

REPORT HIGHLIGHTS

- A technology solution will improve analysis, modeling and reporting of capital and operating budgets, performance measurement and management to support more effective business planning
- Request for Proposal Document 2013-426P was competitively issued and three compliant submissions were received.
- Based on the technical and financial components of the evaluation, including the cost of implementation, Biond Consulting received the highest score and is recommended to be awarded the contract.

DISCUSSION

1. Background

The Integrated Planning Framework (IPF) Program was launched in 2010 to address gaps in the Region's strategic business planning processes. The goal of the program is to improve the overall planning efforts across the organization resulting in more effective analysis, modeling and reporting in key areas to improve the execution of Council's strategic outcomes.

The key areas include the following:

- Capital planning and budgeting
- Alignment of budgets to service outcomes
- Measurement and management of service performance
- Term of Council Priorities (ToCPs)
- Program Plans and Enabling Strategies

September 13, 2013

TECHNOLOGY SOLUTION FOR INTEGRATED PLANNING - DOCUMENT 2013-426P

- Operational Plans
- Financial Planning

A technology solution to support the processes related to: business planning; budgeting; analysis; modeling; performance measurement; management; and reporting has been identified as integral to improving the Region's ability to plan, monitor and manage execution of our strategic goals and outcomes. Peel's environment is continuously evolving and becoming more complex. As such, a more robust tool that has the capacity to evolve with the environment is required in order to provide Council with timely and relevant information.

The benefits of a technology solution are:

- Improved integration of strategic planning, performance measurements and budgeting so information is seamlessly shared and utilized;
- Enhanced connectivity between the operating and capital budget to ensure costs related to capital projects are fully captured (a recommendation from a 2011 report from Internal Audit);
- More effective performance measurement, management and reporting;
- Reduced need for manual and/or customized analysis and solutions;
- Improved capacity for more complex and transparent reporting to match Peel's increasingly complex environment
- Enhanced decision-making by providing strong business analytics to support business decisions;
- Tools that improve supports to program planning and multi-year budget planning; and
- Enhanced publishing and visual-friendly report generation.

The solution will include operating and capital budget tools, as well as technology that will augment business planning and performance measurement, management and reporting across the organization. It will also help to align and manage the budgeting and strategic planning processes, and it will significantly enhance the data available to make strategic business decisions.

The business planning, budgeting and performance measurement and management processes are currently not integrated through the use of technology. In many cases, varied tools and technology that are often not linked or connected to one another are used to support the processes. The technology solution will improve the efficiency and effectiveness of current processes and allow for more complex analysis and reporting. The solution functionalities will be implemented in phases during the next few years and full implementation is expected to be complete in late 2016. The overall benefits to the Region include more efficient planning and budgeting processes and improved decision-making.

2. Procurement Process

The Region of Peel issued a Request for Proposal Document 2013-426P to engage a vendor for the supply and implementation of a technology solution to support the IPF Program. The document was issued on July 8, 2013 to 31 vendors with five submissions received on the closing date of August 2, 2013 from Biond Consulting, BTRG Canada, ToMont Solutions, KPMG LLP and Smart Computers. The submissions from Biond Consulting, BTRG Canada and ToMont Solutions were deemed to be compliant.

The proposals were evaluated in two parts; the first being the technical component and the second the financial component. The Evaluation Committee reviewed the submissions in

September 13, 2013

TECHNOLOGY SOLUTION FOR INTEGRATED PLANNING - DOCUMENT 2013-426P

accordance with set criteria. The evaluation criteria included: vendor profile; implementation services; licensing, maintenance, support, updates and warranties; training and knowledge support services; technology solution non-mandatory requirements; technical requirements; security compliance; terms compliance form; and vendor demonstration and interview. All three vendors were invited to participate in the vendor demonstration and interview segment of the evaluation.

Biond Consulting along with their partner, PriceWaterhouseCoopers, clearly demonstrated their knowledge and experience with implementing similar software solutions for other public sector organizations; as well as how best practices and public sector experts/advisors to support the software implementation may be leveraged. The vendor proposed a sound implementation approach that leverages their broad expertise and, in turn, will optimize Peel's resources. Biond Consulting's submission clearly articulated the desired outcomes that the supporting technology solution is seeking to achieve.

Upon completion of the vendor demonstrations and interviews, the technical component of the evaluation was complete. Purchasing completed the financial analysis. The scores were combined and the overall ranking determined.

The evaluation summary is as follows:

Vendor Name and Location	Technical (80 per cent)	Financial (20 per cent)	Price Submitted	Overall Ranking
Biond Consulting Toronto, Ontario	1	3	\$3,794,610.23	1
BTRG Canada Mississauga, Ontario	3	1	\$2,997,918.93	2
ToMont Solutions Scarborough, Ontario	2	2	\$3,320,299.34	3

The implementation plans from each of the three vendors varied considerably with respect to the amount of support required from Regional staff. After taking into consideration the cost of Regional staff under each of the three proposals, the vendor that proposed the lowest submitted cost became the most expensive and the gap between the next two closes considerably.

The proposal submitted by Biond Consulting received the highest score when assessing the combination of financial and technical requirements, which includes both the RFP document and the vendor demonstration. It verified a thorough understanding of the assignment, proposed a comprehensive project approach and experienced project team. The staff evaluation committee has concluded that the proposal submitted by Biond Consulting provides the best overall value to the Region.

September 13, 2013

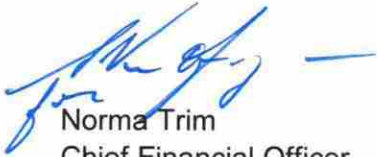
TECHNOLOGY SOLUTION FOR INTEGRATED PLANNING - DOCUMENT 2013-426P

3. Proposed Direction

It is recommended that Biond Consulting be awarded the contract (Document 2013-426P) for the technology solution and implementation services in the estimated amount of \$3,794,610.23.

FINANCIAL IMPLICATIONS

Sufficient funding is available in the capital budget number 13-7120.




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Approved for Submission:



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