

31 August 2026

[REDACTED]
[REDACTED]
[REDACTED]

Dear [REDACTED]

Local Government Official Information Request – SR.113204 - Detail of Council Systems

I refer to your official information request received by the Western Bay of Plenty District Council (Council) on 05 August 2026 where you have requested information pertaining to the current supplier and version of council used systems.

The answers to your questions are set out below:

1. The name, supplier and current version of each principal ERP, financial management, procurement, HRIS, payroll and enterprise asset - management system currently used by the Council.

Category	Identified System	Supplier	Version
ERP	Datascape Enterprise	Datacom	2.45
Property & Rates	Datascape Enterprise	Datacom	2.45
Financial Management	Datascape Enterprise IBIS	Datacom	2.45
		Ibis Technology	26.50.00
Procurement	GETS Government Electronic Tender Service	MBIE	
HRIS	Workday	Workday	2026.32.1083
Payroll	IMS Payroll	MYOB	7.20
Asset Management	Asset & Work Manager (AWM) Univerus Infor Public Sector Service Desk Plus	Thinkproject NZ	6.1.201.0
Transportation			
Parks/Reserves/Facilities & Properties			4.35.2.1
Three Waters Information Technology			2026.08.00 14.9

2. Any current strategy, roadmap, business case, options assessment, programme plan or investment proposal relating to the replacement, upgrade, migration, reimplementation or material redevelopment of those systems.

The first submission for an upgrade was initiated in the [2023-2024 Annual Plan](#).

Please refer to page 31 for details.

We have implemented Stage 1 of the ERP upgrade from Ozone to Datascope for the finance team. Stage 2 is underway for the Regulatory services team.

3. Any approved or indicative budget, timeframe or target implementation date associated with those initiatives.

Please refer to page 40 of 26 February 2025 [Annual Plan and Long Term Plan Committee agenda](#) for a copy of the ERP upgrade costs. These can also be found at pages 37-41 of the [Annual Plan Issues and Options Paper 2023-2024](#).

The [minutes](#) of this Annual Plan and Long Term Plan Committee Meeting Minutes report showing Council endorsement can be found at pages 5-6.

4. Any reports or presentations provided to the Council, a council committee, the chief executive or executive leadership team concerning those initiatives.

Please refer to all attachments, plus Attachments A and B to view the relevant reports and presentations.

5. Any current procurement plan, market engagement plan, request for information, request for proposal or other sourcing documentation relating to those initiatives. There are no current requests for proposals.

You have the right to seek an investigation and review by the Ombudsman of this decision. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602.

Yours Sincerely



Aaron Pendergrast
General Manager Corporate Services

Mā tātau ā raurangi For our Future

Request for Proposal Future Ready ERP

Ref: 24-1022

Date Issued:	23 October 2024
Deadline for Questions:	5.00 pm, 11 November 2024
Deadline for Responses:	5.00 pm, 20 November 2024
Evaluation Method:	Weighted Attributes

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1. This Opportunity in a Nutshell

WBOPDC has issued this Request for Proposal (RFP) to select a supplier to implement multiple modules of a cloud-based Enterprise Resource Planning (ERP) solution to support the organisation to be 'Future Ready'.

A new ERP should enable the design of more customer-centric services, better integrating the services of suppliers and partners, being able to plan and track achievement of broader outcomes including community wellbeing measures and deliver significant process efficiencies.

We (WBOPDC) are seeking to partner with a supplier who has extensive experience with the proposed solution in the New Zealand local government sector and has proven capability and capacity to commit to working with us to achieve our strategic outcomes. A supplier who identifies with our values is important to us.

1.1 Background

WBOPDC has used Datacom's Ozone ERP suite of module for over thirty years. The current Ozone modules in use, are listed in Appendix A. The functionality in Ozone, developed over many years means that it has become more than an ERP, with bespoke functionality designed for Council. Ozone is end of life and a new modern cloud ERP is required to replace it. In 2020 Council undertook an assessment as an organisation to determine its readiness as a future ready organisation. This assessment identified the need to replace the existing ERP (Ozone) as an opportunity to build a platform to deliver on the recommendations.

One of the recommendations was to take a staged approach to replacing the ERP by taking the opportunity to move to more customer centric services. This resulted in a business case to Council to pilot Datascape (Datacom's replacement for Ozone) by migrating to its Customer Relationship Management (CRM) product. For the past two years we have used the Datascape CRM for service requests and workflow and customer records are synced back to Ozone. The intention at the time of writing the business case was to go to market for an ERP replacement following the pilot and this was agreed then with the Council. Due to work programme commitments, progressing to this stage hasn't been possible until year 1 of 2024-2034 Long-Term Plan (LTP) to go to market for a replacement ERP.

Council has budgeted in the LTP for continued investment into our information technology to support the rate of change and innovation in technology, requiring Council to be future ready.

[A capital budget to cover implementation costs has been set aside for a project to replace Council's ERP system.](#)

1.2 Future Ready ERP Project

A multi-staged project has been initiated as follows:

- **Stage 1:** Procurement – Request for Proposal (RFP), Solution/Supplier Selection
- **Stage 2:** Prepare, Design and Build
- **Stage 3:** Multi-staged implementation

WBOPDC have initiated an open RFP process and will rely on respondents satisfying the pre-conditions outlined in the RFP document. This RFP process outlines the approach Council intends to follow to determine a preferred vendor/s and solution.

An investment case will then be completed, in collaboration with the preferred vendor, to detail the required investment for the agreed staged implementation and approach for consideration by Council's leadership.

1.3 What we need

WBOPDC wishes to purchase and secure services to implement and support an Enterprise Resource Planning (ERP) cloud hosted, software solution specific to local government functions.

Council recognises that this scope is extensive, and one vendor may not provide everything, therefore Council will consider a consortium arrangement, led by a primary respondent. Such a consortium would need to have the majority of functionality supported by one software application, with an established integration element to any third-party solution component.

The comprehensive ERP solution includes functional and non-functional components. The entire functional scope has been split between core and non-core functions. These functions are shown in the diagram below.



The above are explained in more detail in Section 4 – Our Requirements and the attached Solution Requirements workbook.

1.4 What we don't want

We are not seeking proposals that focus on capabilities that are yet to be developed as core functionality or are not proven within the local government sector. Council is not seeking to be an 'early adopter'. However, we are interested in your future roadmap.

Council does not wish to consider a 'like for like' technology replacement of our current ERP solution. The opportunity to standardise processes and take advantage of 'good practice' built into software design will be key to meeting the strategic objectives, outcomes and benefits in Section 2.2. On this basis we do not want a solution that requires customisation or bespoke development unique to our Council.

We are not seeking any HRIS and payroll functionality or solutions.

1.5 Why you should bid

This is an opportunity to partner with WBOPDC in a significant step towards enabling local government with modern tools and ways of working.

WBOPDC are open to innovative ways of achieving the requirements, including the adoption of solution-based business processes based on 'good practice'.

WBOPDC are strategically driven and committed to replacing the current ERP solution and will work closely with an ERP partner to complete a successful project within our timeframes.

1.6 A bit about us

The Western Bay of Plenty has a rich history, a strong cultural identity and beautiful natural landscapes. Stretching from Waihi Beach to Otamarakau, covering 212,000 hectares of coastal, rural and urban areas, our district is a place of great diversity.

WBOPDC serves a population of approximately 60,800 (2023) residents and is one of the country's fastest growing provincial districts in New Zealand. The main urban/ village centres are Waihi Beach, Katikati, Ōmokoroa, Te Puna, Te Puke and Maketu.

There are approximately 350 staff employed.

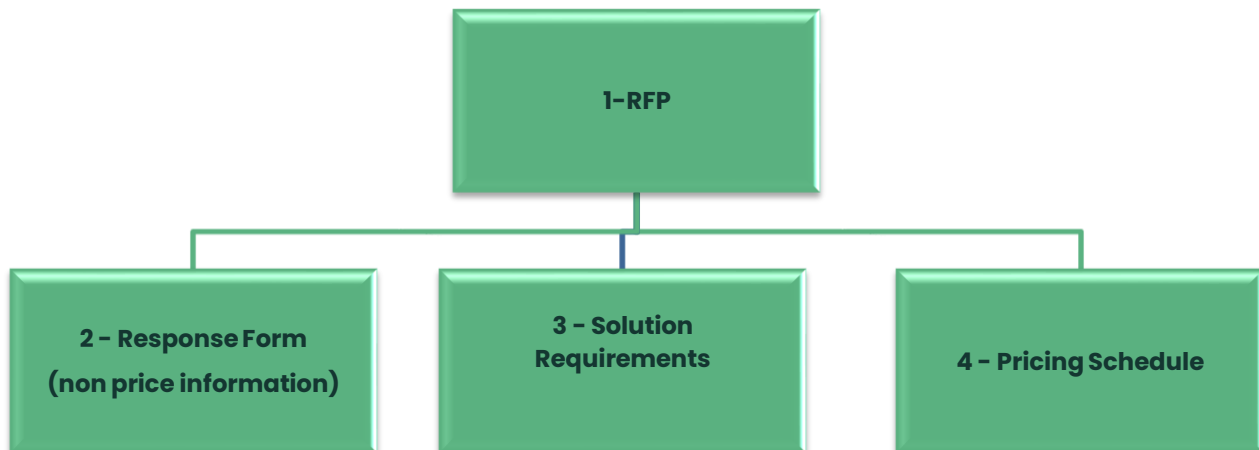
Council has approximately 26,000 current valuation records.

The main WBOPDC office is in Tauranga with area offices and libraries in Te Puke, Katikati, Ōmokoroa and Waihi Beach.

For detailed information about the Council please refer to our website and our Long Term Plan 2024-2034.

1.7 RFP document structure

This diagram illustrates what attachments form part of the total Request for Proposal (RFP) document.



2. What is important to us

2.1 Our Values

Our values underpin the way we are, the way we wish to work together. It will be important partnering with a respondent whose values align with ours.



"Own It" – We take ownership and personal accountability

We do what we say we'll do and put our hand up when things don't go according to plan.

Taking ownership means being accountable for our actions and decisions. We're a council! The people are counting on us. It's about standing by our commitments and addressing challenges head-on. When things don't go as planned, we're honest about it and work together to find solutions.



"Kōrero about it" – We collaborate and connect across teams. We are open, honest, and pono

"kōrero" doesn't just mean talk *at* someone, it also means talking *with* someone. This includes listening. Effective communication is at the core of what we do. By sharing information, working together, and approaching every conversation with honesty and integrity, we ensure that we're all moving in the same direction towards a shared goal.



"Care about it" – We support, manaki, and look out for each other, creating a workplace where everyone feels valued and cared for

By looking out for each other, we build a stronger, more resilient team. Here's what you said:

Have teams' back • Wellbeing first, cost delivery later • Leaders be present and available.



"Make it for Everyone" – We recognise diversity, include, whanaungatanga and value all our people

We absolutely need to make sure that everything we do, is for everyone. This transcends into so much of what we do: making playgrounds accessible, making our comms sound human, making council events at suitable times for mum and dad, connecting with communities who are often unseen or unheard from – it's everything.

2.2 Objectives, Outcomes and Benefits

Investment Objectives

- An innovative, future-proofed ERP web solution that is built native for the cloud offering SaaS, delivering efficiencies, performance and interoperability
- An ERP solution through innovation and design that provides efficiencies for staff and realises benefits to Council's customers through a single view of the customer both inwards and outwards facing by understanding the customer journey and associated back-office workflow and process
- An ERP solution that provides a platform for becoming a future ready organisation, both future ways of working for staff and opportunities for new and enhanced services to customers

Subsequent future ready work in the organisation and requirements workshops with users have identified value outcomes, leading to key benefits from this investment

Value Outcomes

- Enhanced Customer Experience – Customers will have access to real time information, additional online services and self-service capabilities improving the customer experience
- Improved monitoring and responsiveness of compliance, regulations and organisation risks
- Improved consistency, accessibility, reliability and security of data and integrated systems
- The ERP platform provides flexibility, agility and scalability with additional functionality and connectivity options to support future development and growth
- Our people enjoy standardised business processes and tools to collaborate and deliver great service
- Our people have improved accessibility and mobility to support a hybrid way of working
- Improved utilisation of staff talents, time and resources
- Improved data security with standardised and centralised data, improving confidence in the reliability, quality, visibility and timeliness of information

Strategic Benefits

The strategic benefits to Council are:

- Western Bay of Plenty District Council has a reputation for excellent customer service within the community
- Increased workplace efficiency and productivity, with greater cross-organisation collaboration
- Reduced organisation risk through improved reporting, analytics and decision support
- Western Bay of Plenty District Council is 'Future Ready' with the ability to meet future challenges

2.3 Broader Outcomes

Council seeks to partner with an organisation that supports our commitment to the New Zealand Government's broader outcomes and social procurement objectives. We seek partners who can not only deliver high-quality services and solutions, but also contribute to the social, economic, and environmental well-being of our community. Proposals should demonstrate how the Respondent operates in a manner that aligns to and/or contributes to Council's Strategic Priorities.

This includes providing details on how your company will promote sustainability and ensure fair, equitable treatment of all workers involved in the project. We seek a partner who aligns with our commitment to creating lasting, positive change within the community and can deliver tangible benefits that extend beyond the immediate scope of the contract.

We will also be considering Respondent's commitment to aligning with the principles of the Treaty of Waitangi and Te Tiriti o Waitangi by incorporating Māori values and perspectives into their operations and interactions. We seek a respondent who understands Māori cultural heritage and ensures Māori rights and interests are respected in all aspects of service delivery. Respondents should also demonstrate their commitment to supporting Māori economic development and social outcomes, while fostering an inclusive environment that reflects the principles of partnership, protection, and participation as outlined in the Treaty.

2.4 Future Ready Organisation

We are an organisation that is well resourced, adaptable, modern, and attractive to our people. We follow a philosophy of continuous improvement which is implemented across the organisation.

Our current organisational direction is to build on our understanding of what our current customers value and anticipate the services future customers will want.

We will need a workforce that is ready for the future, with appropriate skills, knowledge, and confidence to make the most of change and opportunity.

We will need to develop our capacity and capability to proactively manage change and make sound decisions about using technology effectively and strategically for the future.

We wish to leverage modern technology to provide long term systems assurance, flexibility and scalability to support working in agile ways, ready to adapt for future change.

2.5 Technology Principles

The technology principles that will guide us when selecting an ERP are broadly noted here:

- Data between applications can be integrated to support best-of-breed solutions
- Cloud (SaaS) recommended to reduce risk, providing business continuity, security and no asset ownership
- Standard configuration a preference over customisation to complement the adoption of standard business processes based on 'good practice'
- Customer centric essential
- Consider collaboration and shared platform opportunities
- Data and information is easy to use, report on, analyse, is visual and supports decision making
- An application is modern, future proofed, considers smart technologies

2.6 Project Delivery Principles

The following project delivery principles have been developed to support managing the accumulated change impacts of these projects being delivered concurrently, in a rapidly changing legislative environment for our staff

- Planning a viable, staged ERP implementation approach to minimise the impacts of changes on our customers and staff, and effective project/ change management is a key consideration to ensure positive change is sustained within the organisation
- Change management will be integral component of the planning and preparation as well as implementation of the replacement ERP solution
- Our staff are fully engaged with the project, are kept informed and offered opportunities to participate, with the objective that when new ways of working are introduced, the impacted staff will 'own' the changes
- An emphasis on learning and development for our staff will be adopted
- A planning and preparation focus will be used in project scheduling to manage expectations and be respectful of constrained resources. Multiple levels of governance will be established with clarity on what decisions can be made, where significant decisions will be planned into the project implementation timeline

3. Key Information



3.1 Context

This Request for Proposal (RFP) is an invitation to suitably qualified suppliers to submit a Response for the **24-1022 Future Ready ERP** contract opportunity.

This RFP is an open competitive procurement process.

Words and phrases that have a special meaning are shown using capitals e.g. Respondent, which means 'a person, organisation, business or other entity that submits a Proposal in response to the RFP. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the marketplace that does not submit a Proposal.



3.2 Our timeline

Here is our timeline for this RFP.

Step	Date
RFP advertised on GETS	23 October 2024
Deadline for Questions	11 November 2024
Deadline for Council to answer questions	15 November 2024
RFP closing date	20 November 2024
Evaluation Stage 1	
Advise respondents of Stage 1 outcome	21-23 November 2024 (indicative)
Evaluation Stage 2	
Advise respondents of outcome. Shortlisted respondents confirmed for Stage 3.	By 20 December 2024
Evaluation Stage 3 (indicative dates)	
Shortlisted respondents – Scenario workshops (dates to be confirmed)	January 2025

	Shortlisted respondents – existing customer Site visits and references (dates to be confirmed)	February 2025
	Council approval to proceed	February 2025
	Preferred respondent notified and Contract negotiation commences.	February 2025
	Advise respondents of evaluation Stage 3 outcomes	March 2025
All dates and times are dates and times in New Zealand.		
	3.3 How to contact us Contact us through our Point of Contact via the questions and answers function on Government Electronic Tenders System (GETS). Our Point of Contact: Name: Laraine Jackett Title/role: Contracts & Procurement Manager	
	 3.4 Developing and submitting your Response - This is an open competitive process. The RFP sets out the step-by-step process and conditions that apply - In submitting your Response, you <u>must</u> use the documents provided. Failure to do so may result in your Response not being accepted for evaluation. The Response Form includes details on what information is required from the Respondent. See attachment Response Form for further details - The inclusion of standard sales and marketing content is not required and will not be evaluated - If part of your response is in a marketing type document, please copy and paste the relevant extract into the relevant response section - Responses must be provided as electronic copies via GETS. We will not accept proposals sent by post or delivered to our office - Although this is not a 'two envelope' approach, you must submit your response in two separate electronic files, clearly labelled, as follows: - Using the Response Form provided, your non-price related information and attributes, including the Solution Requirements Worksheet, Video link, plus any applicable attachments - Using the Pricing Schedule provided, your pricing related information and assumptions	

- g. Joint Responses will be accepted

Consortium Arrangements: As stated, Council requires a single prime respondent to provide the complete solution to meet the stated requirements of Core, Non-Core and Value Add capabilities. If a Respondent intends to submit a proposal as a consortium, please detail this information and provide a profile for each consortium party. The proposal must specify who will provide what solution components and name the prime respondent. Council will only contract with one party who will be ultimately responsible and accountable for delivery of the full solution proposed

- h. Alternative Proposals will not be accepted

- i. Using the pricing template provided, your pricing, signed tender form, and any price related tags/assumptions

- j. Even if you've worked with Council before, it's important that you provide full information as if written for a person who is unfamiliar with your company and any of your subcontractors

- k. Under the relevant attributes, you must provide equivalent information for any subcontractors you propose to use

We do not require:

- I. A cover letter
- II. Generic Health and Safety information in your tender
- III. Any information not specifically requested (will be disregarded)

Take time to read and understand the RFP. In particular:

- I. Develop a strong understanding of our Requirements detailed in Section 4
- II. in structuring your Response, consider how it will be evaluated. Section 8 describes our Evaluation Approach
- l. For resources on tendering visit www.procurement.govt.nz/suppliers
- m. If anything is unclear or you have a question, ask us to explain. Please do so before the Deadline for Questions
- n. Check you have provided all information requested, and in the format and order asked for
- o. Having done the work don't be late – please ensure you get your Response to us before the Deadline for Responses!

	3.5 Address for submitting your Response Please submit your Response before the deadline via GETS etender box for: 24-1022 Future Ready ERP Responses sent by courier, post, fax or email will not be accepted.
	3.6 Our RFP Process, Terms and Conditions Offer Validity Period: in submitting a Response, the Respondent agrees that their offer will remain open for acceptance by the Buyer for 6 months from the Deadline for Responses. This RFP is subject to the RFP Process, Terms and Conditions (shortened to RFP-Terms) described in Section 11. We have made several changes to the RFP Terms. Please refer to Section 11.1 for details.
	3.7 Later changes to the RFP or RFP process If, after publishing the RFP, we need to change anything about the RFP, or RFP process, or want to provide Respondents with additional information, we will let all Respondents know by either uploading the information to GETS or emailing all Respondents in a single email, blind copied.

4. Our Requirements

Council's current system environment is shown as a diagram in Appendix B, Current System for Respondents. This information may be useful to a respondent to understand the current technology stack. We have also included in Appendix C, a diagram of Council's Cloud Modern Data Platform (under continuous development).

4.1 Summary of Technology Current State

The following information, regarding the current state environment at Council, has been provided in the Appendices to this RFP document:

- Appendix A – Current Ozone Modules
- Appendix B – Current System Landscape
- Appendix C – Cloud Modern Data Platform
- Appendix D – Service Capability Model

4.2 The Supplier

We wish to work with a respondent who:

- Is a good 'fit' with Council, and whose values align with ours
- Is an engaged, pragmatic and fresh-thinking partner who can think outside the box to meet any future needs
- Will guide and support us with the adoption of better standardised business processes
- Will plan strategically to introduce innovations to the solution, leveraging on technology such as AI and ML to improve efficiency and effectiveness in ways of working
- Has the expertise, experience and tooling required to facilitate the expected significant data migration exercise
- Can offer experienced implementation and post-implementation resources/services, such as on-going support, training, and customer success management
- Has a proactive maintenance schedule to keep pace with industry trends – including security
- Has a clear, well-defined solution roadmap with a corresponding investment plan and a proven track record of delivery to published road maps
- Facilitates customer forums to enable users to share good practices, discuss challenges, collaborate on solutions, advocate and help prioritise feature requests, usability issues and performance concerns

Respondents are encouraged to outline their approach to addressing these requirements within their response.

4.3 Our expectations

- We expect your price to cover full installation and configuration of a system that supports the applying for, receipting of, processing and ongoing compliance of all regulatory services offered by this council (see the Solution Requirements workbook) – in full accordance with the RMA and other relevant local government legislation
- We expect to take Respondents' standard ERP configuration and workflow
- If we require any further regulatory services over those listed in the Solutions Requirements Workbook– the Respondent may assume these will also be covered under a contract variation
- We expect that 'full' installation includes the costs of all physical platforms and licences needed to establish and maintain your solution. This includes any sub or specialist products you need to include to be compliant with our requirements. This does NOT include any platforms or products needed to manage the integration to and from your product to existing Council systems
- We expect 'configuration' includes all efforts incurred by Respondents' staff necessary to fully configure the products – according to a standard configuration
- We expect your solution will fully automate the workflow related to any of the core functionality, and that your price covers all the costs relevant to the platforms and licences needed to support this workflow as well as the configuration of it
- We expect 'fully automate' to cover all the work your staff need to establish the workflow – including the training of our staff to be able to maintain and alter and add to this in the future
- We do not want to remain dependent on you (the Respondent) for future extension of the workflow to cover new services
- Any technical work required to integrate with existing Council systems in order to complete the workflow will NOT be covered by your price. Council assumes your price DOES cover the product expertise needed to inform the integration to those systems listed in Appendix B – Current Systems Landscape
- We expect your solution provides a uniform engagement experience for each of the services listed in Appendix D – Service Capability Model
- We expect a secure digital identity is used, so that Council can confidently associate with a real person. This can be a RealMe identity or similar
- We expect all service transactions carried out online are linked by your solution to this digital identity
- We expect when a customer adds or changes data relating to the service, your system will record the change and the time against their digital identity – in accordance with the Public Records Act
- We expect engagement for all services is through a single customer portal
- We expect that external council customers can maintain their contact data and service and channel preferences

- We expect your solution supports all financial functions and activities implied by our regulatory service scope (see Solution Requirements Workbook) and that:
 - Your price covers all integration to the finance module of your solution, when that integration is from another of the components of your solution
 - Your price may assume a standard finance configuration – compliant with all relevant local council legislation. We understand that any changes we later require to this configuration will be a contract variation
 - Your price does NOT cover the development and implementation of any integration to our existing systems. But it DOES cover the provision of specialist knowledge of your product needed to deliver this work. Refer to the Appendices for the likely integrations covered under this requirement

4.4 Key deliverables/outcomes

The key deliverables/outcomes we require:

Description	Indicative delivery date
Delivery of core functionality of proposed solution – Complete. Note the phased implementation approach is to be confirmed with the preferred respondent, with detailed planning of milestones to follow.	01 July 2026

4.5 Contract term

The anticipated Contract term and options to extend are:

Description	Duration
Initial term of the Contract	10 years
Options to extend the Contract	Up to two extensions of three years each (i.e. 10+3+3)

4.6 Other RFP documents

In addition to this RFP, we refer to the following RFP documentation:

1. Response Form (word document)
2. Solution Requirements (excel spreadsheet)
3. Pricing Schedule (excel spreadsheet)

Note: These documents form part of this RFP

4.7 Other information

4.7.1. Intellectual property

New Intellectual Property arising because of the Contract is expected to be shared between both parties of the contract. Respondents to ensure this included in their proposed contract as per requirements of section 10.

4.7.2. Joint proposals

Joint Responses are permitted provided that full disclosure is given of the consortium, and the manner in which the delivery of the specified services will be appointed and administered and there is a single party to the contract.

A joint response is defined as an organisation who elects to form a consortium with another organisation (described here as a consortium arrangement) with the purpose of improving capability to deliver on the requirements.

Consortium Arrangement: As stated, Council requires a single party to the contract and hence a prime respondent to complete the solution to meet the stated requirements of Core, Non-Core and Value Add capabilities. If a Respondent intends to submit a proposal as a consortium, please detail this information and provide a profile for each consortium party. The proposal must specify who will provide what solution components and name the prime supplier. Council will only contract with one party who will be ultimately responsible and accountable for delivery of the full solution proposed.

4.7.3. Alternative proposals not accepted

Alternative Proposals will not be accepted.

4.7.4. Health and Safety prequalification

We are committed to working with our staff, and suppliers and contractors to ensure a safe and healthy workplace. We expect our suppliers and contractors to have an adequate health and safety management system that includes:

- safe systems of work
- safe work environments
- safe plant and equipment
- adequate health and safety training and supervision

All suppliers and contractors undertaking work for us must declare their health and safety performance. Where your activity includes medium or high-risk activities, you are required to be accredited under the SHE Prequalification (or equivalent confirmed via Tōtika scheme).

You can find out more about SHE Prequalification [here](#). You can find out more about Tōtika scheme [here](#).

Important: these Health and Safety requirements also apply to any subcontractor/s proposed in your tender.

4.8 The Solution Requirements

Refer to the RFP Solution Requirements (Excel workbook) for the extensive list of requirements, which cover:

- **Functional requirements** – identified in two categories – Core and Non-core
 - **Core requirements** are expected to be included in the ERP solution to meet the system needs to deliver council services
 - **Non-core requirements** could be included in an ERP solution to support the delivery and management of council services
- **Non-functional requirements** ensure that the ERP solution is reliable, efficient and capable of supporting the council's needs. The assessment of non-functional requirements will be treated as core.

The Solution Requirements are presented in five worksheets (Tabs)

1. Financial Management	Common functional requirements expected for Council financial management
2. Regulatory Services	Common functional requirements a Council requires to provide regulatory service
3. Customer Support	Common functional requirements a Council requires to provide customer support
4. Other	Functional requirements to assist with strategy, workflows and some non-core functions
5. Non-Functional	The typical range of non-functional requirements we would expect all responders to be familiar with

4.8.1. Subcontractors

Where you plan to outsource a component of the Contract Works, it is important the evaluators have enough information about the subcontractor/s to adequately understand their capability and capacity to undertake the proposed work.

Important: Failure to include information about your proposed subcontractors may result in a poor score.

4.8.2. Cartel conduct

We take seriously any anti-competitive behaviour between suppliers. Please see this [fact sheet](#) about cartel conduct to understand what types of behaviour and communication could put you at risk of breaching the Commerce Act.

5. What we require: The Solution

The implementation of this solution is a significant undertaking for WBOPDC and as such we need to ensure its long-term viability.

We are not seeking a like for like replacement of our current ERP solution. Whilst the services we provide are largely unchanged, technology and expectations have evolved, and our resources are stretched. We are seeking more effective, efficient and better ways of delivering and managing these services.

We expect the solution to:

- Provide a great user experience for council staff, service partners and customers
- Provide services that are easy to access and intuitive functionality
- Be robust, ensuring seamless operations with minimal downtime
- Support the needs of our business-critical applications and services
- Satisfy the non-functional requirements typical of modern cloud-hosted systems
- Be fit for purpose and not require any customisation
- Contain workflows, modules and features that are designed to support local government good practice as well as standard business vertical practices
- Be extensible and configurable by design
- Feature seamless integrations between modules
- Provide rich API interoperability with other products
- Meet the non-functional requirements to ensure that the ERP solution is reliable, efficient and capable of supporting the council's needs

5.1 Value Add Functions and Capabilities

Missed opportunity is a key risk we wish to avoid. Our requirements are focussed on output and outcomes rather than process and method. With our investment in a new system(s) we have the opportunity to improve how we do things – we are looking for a partner that understands that and can add real value in this regard.

Value Add is the evidence of the ability to add value in assisting WBOPDC to identify, develop and incorporate emerging technologies, good-practice processes and approaches.

5.2 Video Demonstration of Key Process

Responders are requested to provide a video, as part of their response, showing the process for how a common scenario at WBOPDC would be completed using the proposed solution.

5.3 Cloud and as-a-service

All Respondents must meet Software as a Service (SaaS)' and 'Cloud Hosting criteria', defined as:

- Software as a Service (SaaS)' – ERP system functionality is available anywhere by any user or integrating system
- 'Cloud Hosting criteria' – ERP solution has a process of continued compliance to recognised industry standards and certifications such as ISO 27001, SOC 2. Please provide evidence of continued compliance
- All interactions with data mastered by your solution will be through a well-documented OpenAPI

Note: these three requirements are a Pre-condition of this RFP

5.4 Integration Overview

We are seeking respondents that can demonstrate a highly efficient, easy to implement integration approach from the proposed solution to existing applications within Council. Refer to 2. Response Form for specific requirements.

5.5 Downstream data use and licensing

There will be approximately 350 concurrent users of your system. Respondents price will cover all the software licences needed for the solution to support the users, endpoint-user technology, mobile technology, integrations, the OpenAPI and all data locations.

Respondents price will include all consumption (usage) costs. E.g. API, cloud storage.

Respondents will indicate any potential license costs for 3rd party data integrations.

Do not include in your price but separate out if known.

5.6 Implementation

5.6.1. Implementation Methodology

We are seeking Respondents that can demonstrate a proven staged implementation methodology, for the proposed solution, resources and processes, including moving clients from 'on premise' to 'in cloud' solution delivery.

During implementation:

- Council will provide an experienced Project Manager to manage Council's activities, including schedule management, council resourcing, financial, issue and risk management
- Council will have a clearly defined governance structure in place, with clear 'Terms of Reference'

- Council will assign resources to the project with the requisite skill, knowledge and experience
- Decommissioning of legacy environments would be Council's responsibility
- Council requires the Respondent to be responsible for data migration activities (planning/scoping, development, loading, testing and reconciliation). Council will assist with extracting and cleansing data from legacy and third-party legacy systems
- Council has shared responsibility with Respondent for integration activities, including current integrations, integrations required through the transition phases of the staged implementation and permanent new interfaces. All integrations are assumed to be implemented in at least two environments, (Production and Test) and are assumed to be prepared to handle English language only unless otherwise noted
- Council requires development of the Testing Strategy, Test Plan, Test Scripts, and Test Data to be the primary responsibility of the Respondent. It will be supported by Council. Activities to develop these is expected to be planned alongside other implementation activities to ensure they are ready and available when needed

5.6.2. Implementation Process

Council requires:

- The options available for a staged implementation approach of the proposed solution, advantages and disadvantages of each option. Responders are encouraged to ensure the Project Delivery principles are incorporated into their responses, and to describe how these principles will be adhered to
- The people change management approach for Respondents' implementation
- How your response addresses our organisation values, project delivery principles and expected strategic outcomes
- Information on resourcing requirements required by Council. Note that this information must align with the information provided within the Pricing Schedule

5.6.3. Support Process

Council requires:

- Support processes, including escalation paths, in operation during implementation phases and post implementation, with documented response times
- Information regarding the type of requests that would be determined as being outside your standard support agreement, and the approach as to how these types of requests would be managed
- Evidence of a proven track record, including responsive support and commitment to service excellence, support response rates for the past four months, (time to resolve across the support categories)
- A description of any SLAs included in your services around both implementation and post go-live support (including periodic upgrades and associated support) as well as any optionality in this area

5.6.4. Development Process

Council requires:

- How the proposed solution development process works, which includes your Solution Development Road Map if available
- The upgrade history of the proposed solution, when the last 3 upgrades were rolled out and levels of functional changes
- Your approach to mitigate risk over the Total Cost of Ownership period of 10 years

5.6.5. Data Migration Process

Council requires:

- the options available and proposed for data migration, including the existence of any data migration tools, resources that are available

5.6.6. Testing and Training

Council requires:

- The proposed approach to both testing and training, including development of WBOPDC test scripts and resources you would expect WBOPDC to make available (quantity and timeframe / duration) and what third parties may need or be advised to be involved
- The testing and training services you will provide as part of a “normal” implementation contract, such as development of WBOPDC specific user manuals, training support and what options exist for additional services by arrangement

6. What we require: Supplier Capability

We are seeking respondents that demonstrate the ability to meet the requirements in this RFP by providing case studies of previous or current contracts. These case studies should closely align to Council's size, complexity and needs as described in this document.

Any assumptions relating to Supplier Capability must be noted within the response.

7. What we require: Supplier Capacity

We are seeking respondents who have the capacity to undertake the implementation of the solution within the timeframe required. We expect the responses to cover details of resource requirements, planning capacity, commitments and how resources will be managed.

Any implementation assumptions relating to Supplier Capacity must be noted within the response.

8. Our Evaluation Approach

This section sets out the evaluation approach that we will use to assess Responses.

8.1 Evaluation model

Weighted Attributes.

Note: Price is part of the evaluation but will not be part of the Weighted Attributes. Instead, price will be evaluated for overall whole-life-of-contract costs, Public Value* and affordability for the Council.

*For Public value definition refer to <https://www.procurement.govt.nz/principles-charter-and-rules/government-procurement-rules/definitions/>

8.2 The Evaluation Process

The evaluation of RFP responses will be completed in three stages:

Stage 1 will be a review and verification that responses received meet the mandatory pre-conditions and meet the administrative and content requirements

Stage 2 will be a desk-based evaluation of responses received. Non-price responses will be evaluated first, followed by price evaluation. A short list of respondents will be identified to proceed through to Stage 3.

Stage 3 will be a combination of demonstrations (scenario workshops, where specific council processes will be demonstrated within the proposed solution, utilising 'good practice'), site visits and reference discussions with identified clients of responders.

Following the evaluation, contract negotiation will commence with the preferred respondent. Should this be successful, contract approval will then be completed, in collaboration with the preferred respondent to detail the tender/contract and required investment for the agreed staged implementation and approach for consideration by Council's leadership. Following the decision all respondents will be notified of the outcome.

8.3 Scenario Workshop and Demonstration

Following the RFP Evaluation Stage 2, Council will provide a list of scenarios or solution components to be demonstrated by selected responders in the scenario workshops.

8.4 Evaluation Stage 1 – Pre-Conditions

Each Response must meet all the following pre-conditions. Responses which fail to meet one or more will not proceed to further stages of evaluation.

Respondents who are unable to meet all pre-conditions should conclude that they will not benefit from submitting a Response.

No	Pre-condition
1.	Proven Solution/Implementation Approach Respondent's proposed solution is proven and operationally in use by: - at least three councils within New Zealand that fully meet the requirements for all the following council functions: Property Rating, Financial, Regulatory and - at least one of these solutions for a council must be a new 'Cloud based' implementation and not a migration from an 'on-premise' solution to 'Cloud' solution
2.	Hosting criteria Respondent's proposed solution meets: 'Software as a Service (SaaS)' – ERP system functionality is available anywhere by any user or integrating system 'Cloud Hosting criteria' – ERP solution has a process of continued compliance to recognised industry standards and certifications such as ISO 27001, SOC 2. Please provide evidence of continued compliance - All interactions with data mastered by your solution will be through a well-documented OpenAPI
3.	Insurance Respondent has required insurance levels.
4.	Programme commitment Respondent's implementation approach to be a staged (multi- phased) implementation to meet an implementation timeframe of completion, of all phases of core functionality, by July 2026.
5.	Contract governed by NZ law The proposed contract shall be governed by, and construed in accordance with, the laws of New Zealand. Both parties agree to comply with all applicable New Zealand legislation and regulations, including but not limited to the Privacy Act 2020, the Fair Trading Act 1986, and the Consumer Guarantees Act 1993. Any disputes arising under or in connection with this Agreement shall be subject to the exclusive jurisdiction of the courts of New Zealand.

8.5 Evaluation Stage 2

Step	Process
1.	Score each of the evaluation criteria using the scoring scale.
2.	Price will be evaluated for overall whole-life-of-contract costs, public value and affordability to Council. This will be based on Respondent's Pricing Schedule.
Ranking	The tender with the highest overall index (outcomes from Step 1. and Step 2) will rank highest. The Council reserves the right to determine which Respondents, and how many Respondents are shortlisted (if any). Respondents will be informed whether they have been shortlisted.
Note: Should Council determine, in its sole discretion, that only one Respondent is fully qualified, or that one Respondent is clearly more highly qualified than the others under consideration or is the most responsive to the stated RFP requirements, then that Respondent will be selected as the Preferred Respondent and progress to the next evaluation/procurement stage.	

8.5.1. Evaluation Stage 2 criteria

Responses which meet all pre-conditions will be evaluated on their merits according to the following evaluation criteria weightings and overall affordability and Public Value to Council.

Criteria		Weight (%)
Track record, including the Supplier capability		30%
Capacity of the Supplier to deliver:		20%
Solution: Note: An extensive list of solution requirements is located in the Solution Requirements workbook. Core Functionality 35% Evidence of 'fit for purpose' to RFP functional core and non-functional requirements. Non-core Functionality 10% Evidence of 'fit for purpose' to RFP functional non-core requirements. Value-add Functionality 5% Evidence of 'Value Add Functions and Capability'. Evidence of ability to add value in assisting WBOPDC to identify, develop and incorporate emerging technologies, good-practice processes and approaches.		50%
TOTAL		100%
Price will be evaluated and analysed for overall whole-life-of-contract costs, Public Value and affordability for the Council.		Public value and Council affordability analysis

Refer to 2. Response Form for further details regarding what information is required from Respondents.

8.5.2. Evaluation Stage 2 Scoring

We will use the following scale in evaluating Responses. Scores by individual panel members will be modified through a moderation process across the whole evaluation panel.

Rating	Definition	Score
EXCELLENT significantly exceeds the criterion	Exceeds the criterion. Exceptional demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	9-10
GOOD exceeds the criterion in some aspects	Satisfies the criterion with minor additional benefits. Above average demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	7-8
ACCEPTABLE meets the criterion in full, but at a minimal level	Satisfies the criterion. Demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource, and quality measures required to meet the criterion, with supporting evidence.	5-6
MINOR RESERVATIONS marginally deficient	Satisfies the criterion with minor reservations. Some minor reservations of the Respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	3-4
SERIOUS RESERVATIONS significant issues that need to be addressed	Satisfies the criterion with major reservations. Considerable reservations of the respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	1-2
UNACCEPTABLE significant issues not capable of being resolved	Does not meet the criterion. Does not comply and/or insufficient information provided to demonstrate that the Respondent has the ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	0

8.5.3. Clarifications and Due diligence

In addition to the above, we may undertake due diligence activities to confirm the viability and overall value of Respondent's proposals. These due diligence activities may include:

- Reference check Respondent and any named personnel
- Make other checks of the Respondent e.g. search of the Companies Office
- Inspect audited accounts for the last three financial years
- Requests for further clarification of information contained within Respondent's submissions

8.6 Evaluation Stage 3 – Scenario Workshops, Site Visits and References

8.6.1. Scenario Workshops

Following Evaluation Stage 2, short listed Respondents will be invited to present and demonstrate their solutions through 'scenario workshops'. An indicative listing of the expected scenario will be confirmed at the conclusion of Evaluation Stage 2. The scenarios will cover key business processes to cover core functionality. It is expected the scenario workshops will be completed at Council's Tauranga offices. Respondents must identify any potential issues or conflicts with the indicative timing in their response to this RFP.

Scenario workshop planning and logistics will be completed with confirmation of the short-listed Respondents. Council expects key members of the Respondents implementation team proposed be present at any workshop, presentation or demonstration related to implementation topics.

8.6.2. Site Visits and Site References

Council may undertake site visits and/or site references of existing clients of the Respondent with relevant experiences with the Respondent and/or the proposed solution. These activities are to confirm the viability, approach and overall proposition of the short-listed Respondent.

Council reserves the right to consult with references, including but not limited to those provided in the Respondent's proposal, to assess the Respondent's performance, capabilities, and suitability for the requirements outlined in this RFP.

8.6.3. Evaluation Stage 3 Scoring

Evaluation Stage 3 will be a validation of Stage 2 i.e. using the Stage 3 components (workshops, site visits, etc) to validate Stage 2 Responses. There will also be an overall Stage 3 score based on the Evaluation Stage 3 workshops. Workshops will be evaluated using same scoring approach as for Stage 2.

8.6.4. Best and Final Offers (Optional – If needed)

During Stage 3, Council may issue a written request for Best and Finance Offer (BAFO) to one or more Respondents. The request will include a specified date and time for receipt of BAFO response. The request includes general instructions and questions applicable to all BAFO participants, as well as a list of issues, concerns and/or requests for additional clarification including, but not limited to service capabilities, cost and contractual gaps and other Respondent-specific issues unique to each BAFO participant.

The objectives of the request for BAFO may include obtaining:

- The best price for requested services
- Changes to contract terms to better align them to Council requirements
- Clarifications where initial proposals were deemed ambiguous or confusing by the TET
- Changes to the proposed approach or timing to the extend deemed necessary by Council
- Changes to or more information about proposed project personnel

9. Pricing Information

We wish to obtain the best value-for-money over the whole-of-life of the Contract. This means achieving the right combination of fit for purpose, quality, on time delivery, quantity and price.

Council's procurement policies include the following relevant statements:

- Public value underpins Council procurement. Public value is more than good price and good quality; it is getting the best possible result over the whole-of-life of goods, services or works being procured. Value is the legacy and lasting benefits created through how Council delivers its work
- All procurement activity will focus on buying local wherever possible to build local economies and create lasting value for its communities
- Council reserves the right to determine which Respondents and how many Respondents are shortlisted (if any)

9.1 Pricing information to be provided by respondents

Respondents must use the Pricing Schedule, in your proposal submission to have a conforming price response and Respondents must ensure ALL sections are completed. Do not alter the structure of the Pricing Schedule, as this could result in disqualification of your submission.

The pricing schedule is to show a breakdown of all costs, fees, expenses and charges associated with the full delivery of the Requirements over the whole-of-life of the Contract. It must also clearly state the total Contract price exclusive of GST. All prices must be in \$NZD.

Where the price component is based on fee rates, specify all rates, whether hourly or daily or both as relevant, within the 'Basis for Calculation' column within the Pricing Schedule.

Respondents must follow the instructions in the Pricing Schedule re indexation (e.g. CPI) when completing their submission.

In preparing their Response, Respondents are to consider all risks, contingencies and other circumstances relating to the delivery of the Requirements and include adequate provision in the Response and pricing information to manage such risks and contingencies.

Respondents are to document in their Response all assumptions, dependencies and qualifications made about the delivery of the Requirements, that affect the pricing and/or total cost to us. In other words, if the Respondent would expect us to pay more than the stated price or estimate if assumptions, dependencies or qualifications are not satisfied, The Respondent must call out those assumptions, dependencies or qualifications. These assumptions may include timelines, resource availability, third party services or products.

Hours worked shall be exclusive of travel time. Council does not pay for travel time other than actual time spent while working on project deliverables.

Where two or more Respondents intend to lodge a consortium Proposal, the Pricing Schedule is to include all costs, fees, expenses and charges of all Respondents, in a contract with a single Prime Respondent.

Where other 'Third Party' vendor software/support is required for the proposed solution(s) to function we will need an indication of purchase price/implementation and ongoing costs. Where Respondents are unable to provide the costs, this should be noted in the assumptions, along with

details of the third-party software required. Note: The Council does not intend to take on the role of systems integrator between components of a consortium-based solution. We require the respondent to assume this responsibility to implement and provide ongoing support and maintenance.

Respondents should identify and price any optional services or add-ons separately.

Procurement of Selected Modules: Council may procure all, or any combination of, the solution modules/components whether they are described as Core, Non-Core or Value-Add capability. Should the Council consider any module/s not to be suitable in meeting our requirements, it may not elect to procure that module as part of a bundled solution as proposed in response to this RFP. Respondents should consider this in preparing their pricing responses.

Respondents should specify any available discounts, including early payment or bulk purchase discounts. Outline the proposed payment terms.

Respondents must ensure that all pricing information is clear, transparent and calculated accurately. Failure to provide complete and accurate pricing details may result in your response being disqualified for non-compliance.

10. Proposed Contract

At the conclusion of the procurement process, the Council intends to negotiate and enter contractual arrangements with the Preferred Respondent(s). Council approval may be required before negotiations can commence.

10.1 Proposed Contract

The contractual arrangements entered by the Council with the preferred respondent will include the following:

1. Software as a Service Agreement (including hosting)
2. Implementation Services Agreement
3. Support and Maintenance Agreement (including integration maintenance for integration between proposed solution components)

In addition to above, Council requires the proposed contract terms and conditions to:

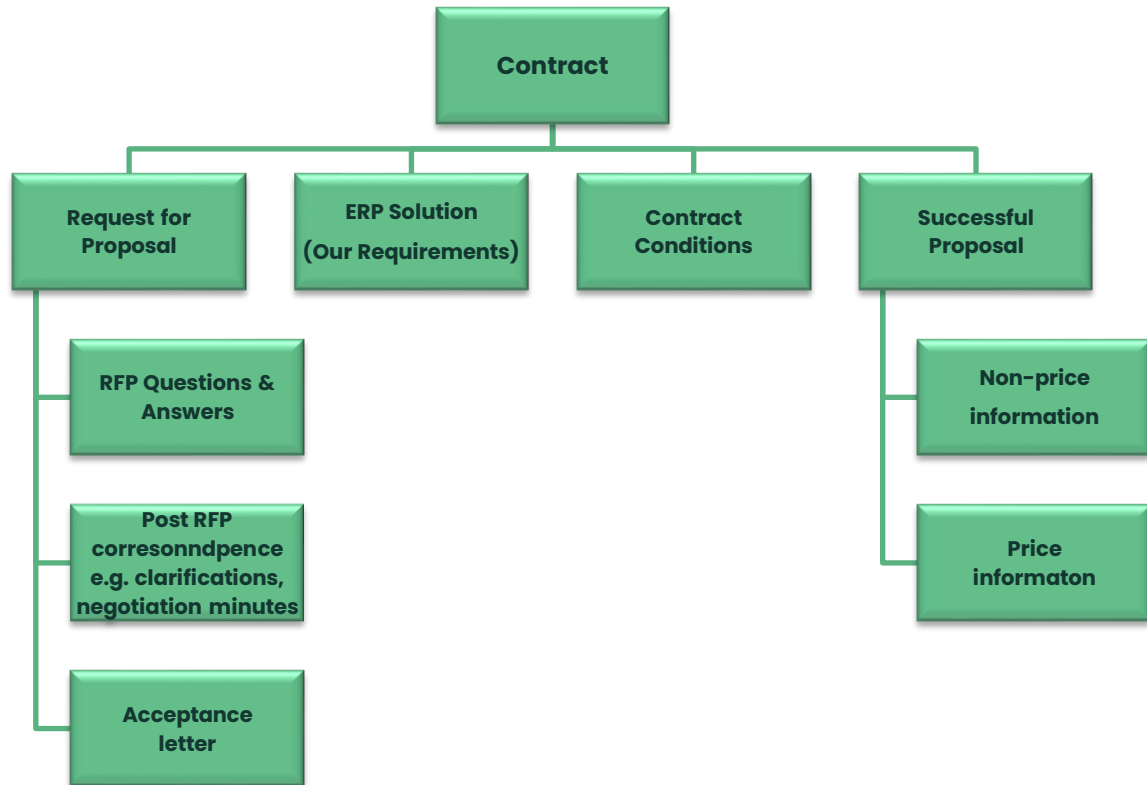
- a. Cover Council's requirements
- b. Support whole-life-of-contract costs, Public Value and affordability to Council
- c. Be acceptable, reasonable and any risks are assigned to the most suitable party to the contract
- d. Result in negotiations that will be straightforward and not protracted

Please attach your proposed contract terms and conditions including any software licensing, SaaS, maintenance, and/or 3rd party agreements in your proposal as part of your response.

The Tender Evaluation Team's assessment of the ease of contracting with a Respondent and the acceptability of the Respondent's Proposed Contract terms and conditions will be part of its shortlisting decision during Evaluation Stage 2.

10.2 Contract document structure

The contract will be made up of a series of documents that form the total contract bundle. The purpose of this diagram is to provide a visual overview of what is included. It does not represent the order of precedence or the order of contents.



11. RFP Process, Terms and Conditions

Please view the RFP Terms [here](#).

11.1 Variations to the RFP Terms

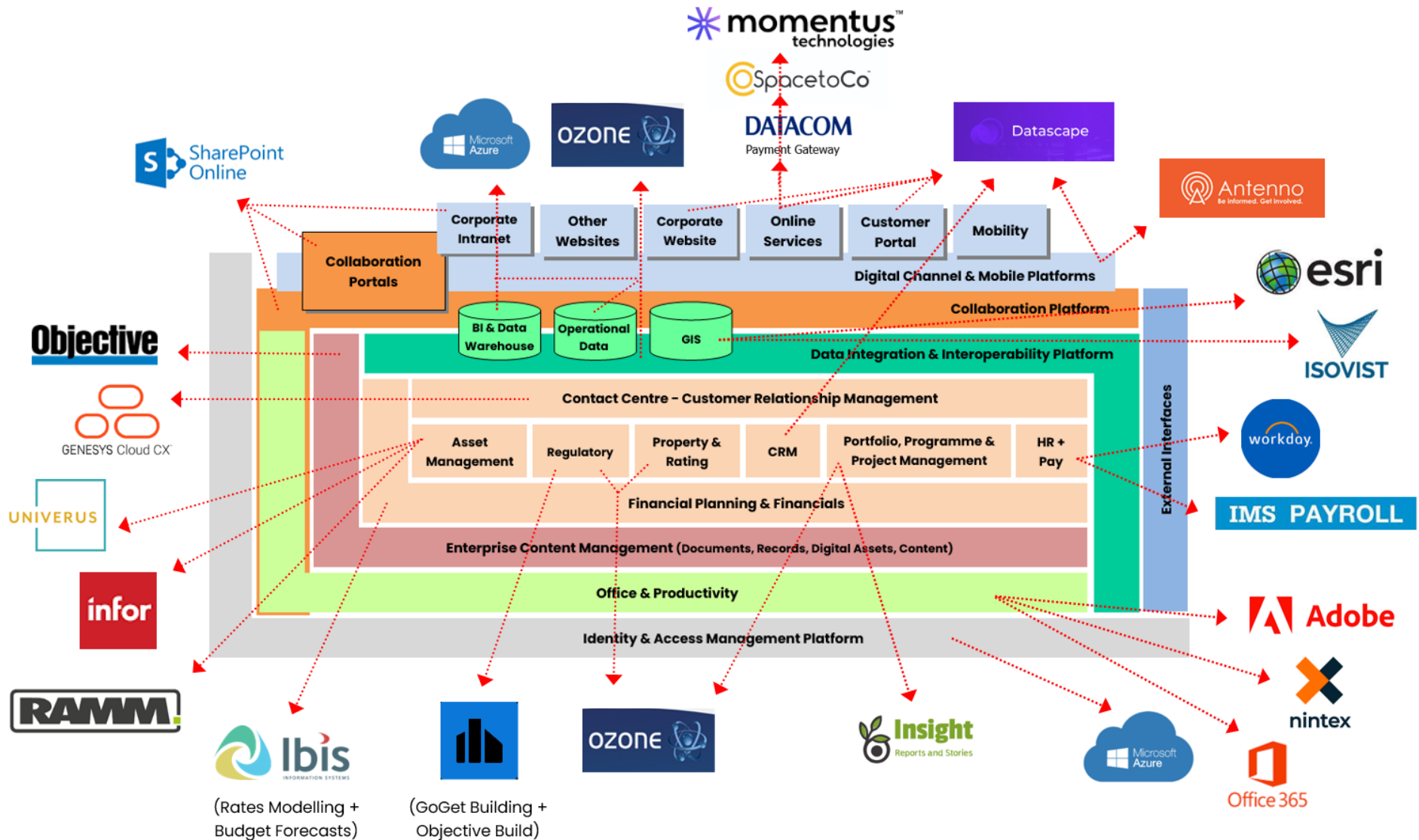
Topic	New / modified clause
Respondent debrief (6.10 d.)	Where three or more conforming Responses are received, all Respondents may be advised of the: • Name of the successful Respondent/s • Date the contract/s was awarded • Term of the contract/s • The highest and lowest offers Council evaluated to award the contract
Competitor agreements (6.16)	In submitting a Response, the Respondent agrees to fully disclose the contract scope and total value for any agreements with competitors.
Late Responses (6.22 b.)	In exceptional circumstances, the Buyer may accept a late Response where it considers that there is no material prejudice to other Respondents. The Buyer will not accept a late Response if it considers that there is risk of collusion on the part of a Respondent, or the Respondent may have knowledge of the content of any other Response. Examples of exceptional circumstances include: • Major technology issues including entire network outages (evidence required) • National or regional emergency declared Should a Respondent be late in delivering their Response, the Respondent must advise urgently, and prior to the Deadline for Responses, Council's Point of Contact that they can not meet the Deadline, unless they are unable due to an exceptional circumstance as defined above.
Non-employees	Respondents must indicate and provide details in their Response if they intend any person (or organisation) who is not an employee to perform work on the services.
The Buyer is a local authority	The Respondent acknowledges that the Buyer is a local authority, and that in terms of its regulatory functions as a local authority, the Buyer is obliged to, and shall act as, an independent local authority and not as a party to this Contract. Any consent or approval of the Buyer acting as a party to this Contract shall not be construed as a consent or approval of, or bind it, in its regulatory capacity.
Referees	The Buyer is not obliged to contact referees provided by Respondents and may seek further information on any issue from sources other than the referees provided.

12. Appendices: Current State Information for Respondents

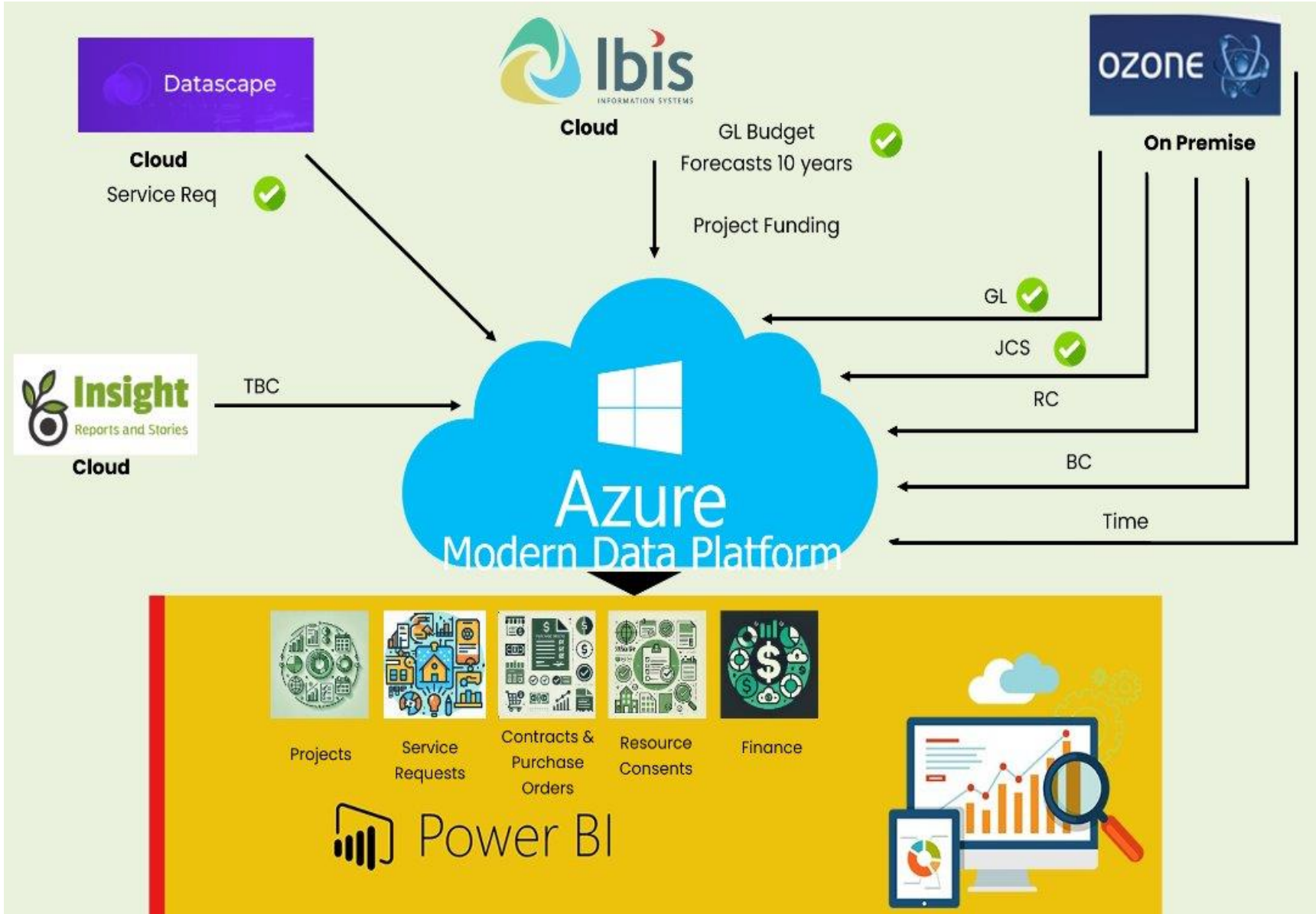
12.1 Appendix A – Current Ozone Modules

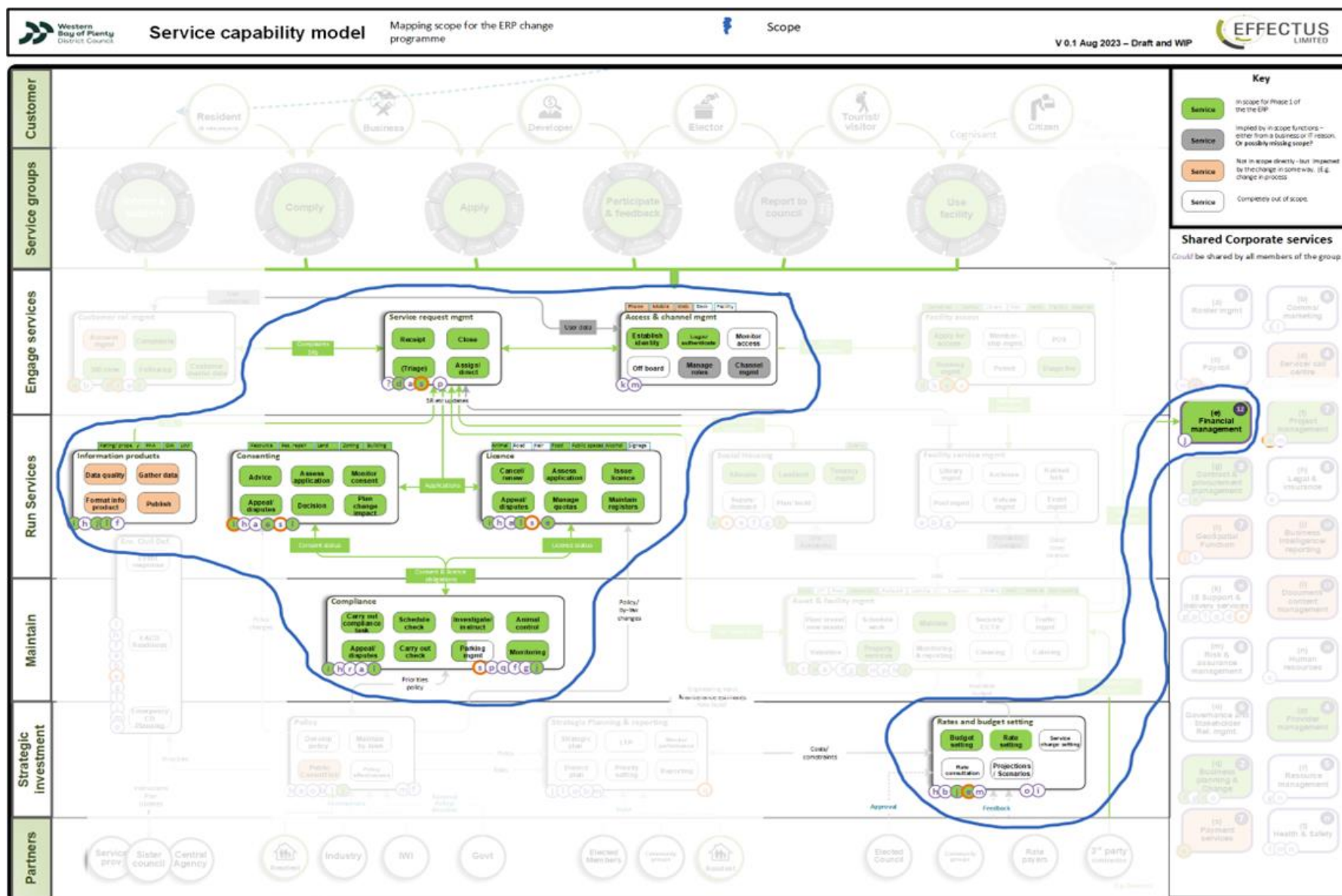
Finance	Regulatory	Property & Rating	Customer & Other
AMS – Asset Management System (Financials)	BC – Building Consents	RT – Rates Processing (incl. Valuation database)	CONTACTS – CS (Customers) SYNC to Datascape CRM
AP – Accounts Payable	BOND – Bonds	PR – Council owned Property & Reserves	ORG – Organisation Structure
CO – Contracts (Contract Payments)	COMPSCH – Compliance Schedules	NPD – National Property Database/ DVR	PC – Post Codes
CORP – Corporate Planning	DR – Animals Control (Dogs)	PARCELS – CS	CEN – Community Engagement (Submissions)
CP – Central Processing/ Bank Processing	ESM – Environmental Monitoring	CRS (LAND)- Land Data & Information	
CR – Cash Receipting	INF – Infringements	CE – Cemeteries	
DL – Direct Link (Banking)	PI – Parking		
DM – Debt Management	PL – Liquor Licences		
DW – Data Warehouse (Finance)	PL – Premises Registrations		
GL – General Ledger	RC – Resource Consents		
JCS – Job Costing	TI – Time		
PO – Purchase Orders	LIM – Land Information Memorandum		
SI – Sundry Invoicing			
WB – Water Billing			

12.2 Appendix B – Current System Landscape



12.3 Appendix C: Cloud Modern Data Platform





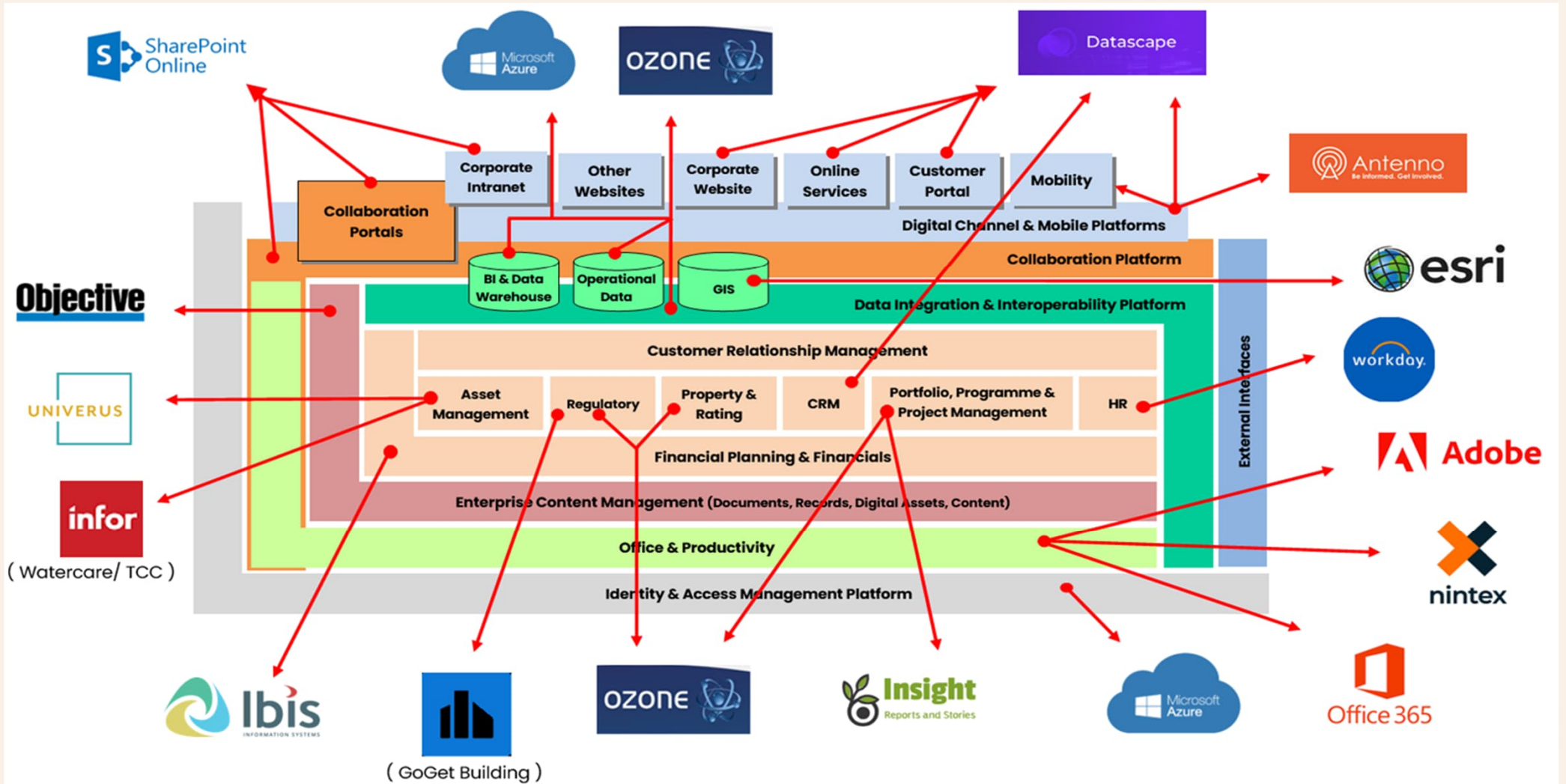


ERP Background Information Current Landscape

Presentation to CEO

By CIO
December 2023

Current WBOPDC IT applications 2024



WBOPDC Corporate Application Roadmap as at 2023

Category	Current State	Future State Options	Strategic Choice
Financial Management	Ozone	Datacom Datascape financials ? Or other ERP	Retain/ Migrate
HRIS	HR.Net	SAP Success Factors for HR (TCC shared platform)	Replace
Payroll	IMS Payroll	IMS Payroll/ SAP Success Factors	Retain/Migrate
Regulatory & Compliance	Ozone	Datacom Datascape Regulatory ? Or other ERP	Retain /Migrate
Customer Relationship Management (CRM)	Ozone	Datacom Datascape CRM	Retain / Migrate
Asset Management (Property & Reserves)	Univerus (was AssetFinda)	Univerus	Retain
3 Waters Work Order & AMS (collaboration TCC)	Infor EAM	Infor EAM	Retain
Corporate Planning & Projects	Ozone & Insight Reporting	Datacom Datascape Corporate Planning ? Insight Reporting → IBIS? Or other ERP	Retain / Migrate
EDRMS (document & record management)	Objective ECM	Objective ECM Cloud; Sharepoint Online?	Retain/ Migrate
Enterprise Collaboration (intranet)	SharePoint Online M365	SharePoint Online M365	Retain
Digital Channel & Web	Datascape Digital Services	Datascape Digital Services	Retain / Extend
Office & Productivity	MS Office / O365 Outlook	M365	Retain
GIS & Spatial	ESRI ArcGIS product suite	ESRI ArcGIS / cloud?	Retain / Extend
BI & Reporting	Ozone, SQL , Power BI	Microsoft Reporting Services (SSRS), Power BI → Fabric	Retain / Extend

Ozone Modules (Note: Current ERP Scope is to replace Ozone)

Finance	Regulatory	Property and Rating	CRM & other
AMS - Asset Management System (financials)	BC - Building Consents	RT - Rates Processing (incl. Valuation database)	CC - Contact Centre (service requests for animals only)
AP - Accounts Payable	BOND - Bonds	PR - Council Owned Property & Reserves	CONTACTS - CS (customers) SYNC to Datascape CRM
CO - Contracts (Contract payments)	COMPSCH - Compliance Schedules	NPD - National Property Database/DVR	ORG - Organisation Structure
CORP - Corporate Planning	DR - Animal Control (Dogs)	PARCELS – CS	PC – Post Codes
CP - Central Processing/Bank Processing	ESM - Environmental Monitoring	CRS (LAND) - Land Data and Information	CEN - Community Engagement (submissions)
CR - Cash Receipting	INF - Infringements	CE - Cemeteries	
DL – Direct Link (Banking)	PI - Parking		
DM – Debt management	PL - Liquor Licences		
DW - Data Warehouse (Finance)	PL – Premises Registrations		
GL - General Ledger	RC - Resource Consents		
JCS - Job Costing	TI - Time		
PO – Purchase Orders	LIM - Land Information Memorandum		
SI - Sundry Invoicing			
WR - Water Billing			

Opportunities and Gaps in ERP

- Fuel cards and Fleet transactions (currently in HR.Net)
- Energy/ Climate Change data/analysis reporting
- Contract management
- Time recording
- Integration to IBIS for financial and project planning

Note

Work to be undertaken to understand what the business needs from a new ERP - suggest workshops or meetings with Ozone business owners and their SMEs (subject matter experts) for each module “wish lists” and gaps

Council's Strategic Priorities

Any future ERP functionality should support the achievement of Council's strategic priorities :-

- 1) Enabling housing
- 2) Empowering communities
- 3) Growing authentic Te Tiriti based relationships
- 4) Providing well maintained, resilient and efficient infrastructure
- 5) Responding to climate change

ERP replacement identified as a project in FRO report to ensure Council is ready for the future

Are there any future information /data requirements based on the strategic priorities not in the current ERP?

Future Ready ERP

FRO report identified 7 information technology attributes to consider when making any future technology investment including the ERP

1. Information and Data
2. Customer-centricity
3. Platforms
4. Smart Technologies
5. Staff Productivity
6. Channels and Services
7. Security and privacy

These attributes are reflected in the following slides

- (a) the Digital Strategy,
 (b) the principles for application selection
 (c) options for ERP selection



Information and Data

- Right data collected and managed
- Ability to integrate data from external sources
- Strong analytics supporting strategic and operational knowledge
- Evidence-based decision-making
- Dashboards for managers, staff
- Data visualisation tools
- Clear business ownership of data and quality of information
- Open data by default



Customer-centricity

- Single view of customer
- Customer-led design
- Personalised user experience and feedback
- More self-service
- Internal integration of customer data /services
- Integrated and value-added customer service experience through external data sharing with other agencies / services
- Customers have visibility over their data and its use



Platforms

- Cloud first – selection based on security, integrity and availability
- Buy services and platforms rather than assets (SaaS before PaaS before IaaS before owning assets)
- Commercial, off-the-shelf before build
- Shared services and AoG platforms preferred when available and suitable
- Business continuity built-in at all levels
- Interoperability through use of standards and APIs



Smart Technologies

- Drones
- AI/learning systems
- Robots
- “Chat” Bots
- Internet of Things
- Everything geolocation-aware
- Auto language translation
- Virtual/augmented reality



Staff Productivity

- Greater self-service, e.g. analytics
- Mobile and distributed - anywhere, anytime, any device
- Decision support systems
- Process automation and management by exception
- Collaboration tools support cross-functional, distributed teams and partnerships
- Supports effective change management and project delivery



Channels and Services

- Multiple channels to support diversity of customer needs/ technology adoption
- Seamless service delivery/handoff between channels
- Ability to integrate and manage services and relationships with suppliers and partners



Security and Privacy

- Proactive cyber-security management
- Information and data security built-in at all levels
- Customer data used and shared only with consent (or by law)
- Robust business continuity and DR

~ WBOPDC Digital Strategy on a Page ~

UNDERSTANDING OUR CURRENT AND FUTURE CUSTOMERS

Understanding and delivering services that our customers value

Digital by Design

Services are designed for digital

- New services are designed 'digital by default', seamless, smart and secure
- Staff consistently involve users in designing services and planning key projects
- Effective tools assist staff respond to customers, wherever staff are

Multi Channel Information Service

Customers access information in a way that suits them

- Information is designed for digital consumption by default
- Customers are assisted to transact digitally, alternatives are provided for those who cannot
- Customer information is designed for self-help

ENGAGED AND FUTURE FOCUSSED WORKFORCE

Informed and confident workforce, ready for the future

'Digital by default' culture

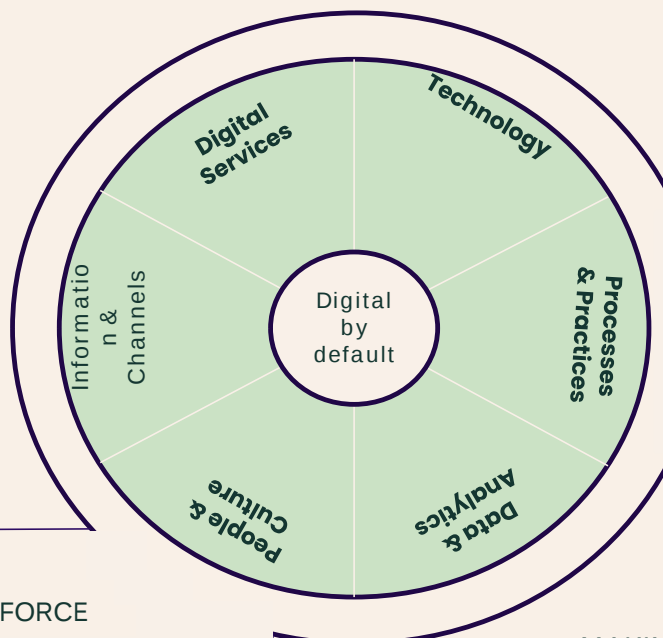
Workplace culture enables digital services innovation

- Digital business skills are a focus for talent management processes
- Innovation is encouraged when developing new initiatives
- Technology and process innovations improve productivity and job satisfaction
- Managers and staff use information tools to plan staff resources effectively

Customer Experience

Customers transact digitally because it is easy to do so

- People find it easy to deal with us because we design our services to suit customer preferences
- New services are designed with the customer in mind – 'know me'



FUTURE PROOFED TECHNOLOGY

Strategic planning provides direction and priorities in technology decisions

Technology Innovation

Emerging technologies are explored and adopted when appropriate

- 'As-a-service' (aas) and cloud options continue to be evaluated
- AI/IOT is explored and adopted where appropriate
- Decisions about core technology are informed by a long-term strategic view of the organisations needs and opportunities
- Key systems are fit for purpose and future-proofed
- Leaders keep abreast of technology changes and understand what they can offer the business

Aligned work practices

Business processes and practices support 'digital by default'

- Non-digital service components form part of new digital service design and development
- Process and practices support the end-to-end digital experience
- Customers and technology users are involved in identifying opportunities for improvement, and designing them
- Business improvement priorities across the organisation drive technology development priorities

MAKING DECISIONS THAT STAND THE TEST OF TIME

Knowing we're doing the right things, now and for the future

Data has value

Data driven insights reshape our policies, practices and services

- Data is seen as an asset, invested in, planned and managed, is open by default (except in relation to privacy of individuals)
- Data insights form part of the evidence base for decision making
- Context, interpretation and risk analysis transforms data into knowledge and understanding
- People can access reliable information easily so that knowledge can be efficiently shared with decision makers and that information (data) is secure and protected

Principles for an Application taken from Digital Strategy

- Data between applications can be integrated to support best-of-breed solutions
- Cloud (SaaS) recommended to reduce risk, providing business continuity, security and no asset ownership
- Standard configuration a preference over customisation
- Customer centric essential
- Consider collaboration and shared platform opportunities
- Data and information is available for reporting - is easy to use, visual, supports decision making
- Modern, future proofed, considers smart technologies

ERP Selection Options

- Stay with Datacom - Migrate Ozone to Datascape - continue phased approach, regulatory, financials, property & rating (Ruapehu report)
- Closed RFI to LG solution providers - Datacom, Civica, Magiq, Technology One, Infor (Effectus report 2020)
- Shared tenancy with TCC on SAP – if interest by both Councils
- Western Bay opportunity to support/ implement together with the other Ozone BOP councils (Whakatāne, Kawerau and Ōpōtiki)
- Other? Do nothing yet?

Notes

- Regional council development on Datascape (regulatory) – BOPRC
- Leverage off templated approach with others migrating to Datascape – Ruapehu, Clutha Councils)
- Leverage off Technology One councils in region – Gisborne, Rotorua and Taupō
- Successful implementation of Datascape CRM at Western Bay
- Datascape already used for all online customer facing transactions integration to website, Online Payments and Ozone

Is there any preference from you on Options? Timing?

Vendor Option Analysis

Option	Advantages	Disadvantages
Stay with Datacom – migrate to Datascape	Leverage off Ruapehu, Clutha, Waimakariri and Kapiti Councils' implementations BOPRC – regulatory Datascape being developed WBOP – Datascape CRM and core Datascape already implemented successful and known to users Can continue a phased/managed approach Good relationship with vendor Likely to be most efficient and cost effective Opportunity for other BOP Councils to leverage off our implementation if migrate from Ozone to Datasca	May miss opportunities that other solutions provide (could
Closed RFI with Council related providers Datacom, Civica, Magiq, Technology One, Infor (Effectus report 2020)	Ensure that our requirements are met from a new system Could consider a best-of-breed approach across modules	Costs may escalate due to system setup requirements – see Rotorua experience
Shared tenancy SAP (Tauranga)	Christchurch implemented, Auckland used their baseline. Tauranga have leveraged Auckland and continuing to roll out system. Would be happy to support us and to utilise all reporting and baseline system requirements. Shared tenancy planned with TCC on SAP Success Factors Allows for shared service options, and staff knowledge transfer	Unknown costs to operate – likely to be more expensive than the smaller operator options Implementation of full SAP ERP suite not complete at TCC
Technology One	Leverage off Rotorua and Taupō Councils' implementations	Unknown vendor Lengthy implementations and higher costs

ERP LTP Budget

Name	Forecast 2023/24	Year 01 2024/25	Year 02 2025/26	Year 03 2026/27	Year 04 2027/28
IT Migration of Ozone to Datascape (replacement of council's ERP solution)	250,000	690,000	890,000	950,000	530,000
financials modules				230,000	
regulatory modules		170,000	170,000		
property & rating modules					230,000
Project Manager		120,000	120,000	120,000	
Business Analyst	100,000	100,000	100,000	100,000	
Backfill SME BAU resources (per suite of modules 3 to 5 roles pa)		300,000	500,000	500,000	300,000
Stage 1 – Feasibility & Readiness	25,000				
Stage 2 – Clarify needs & fit for purpose	50,000				
Stage 3 – Vendor & product selection	75,000				
Stage 4 – Implementation					

Notes

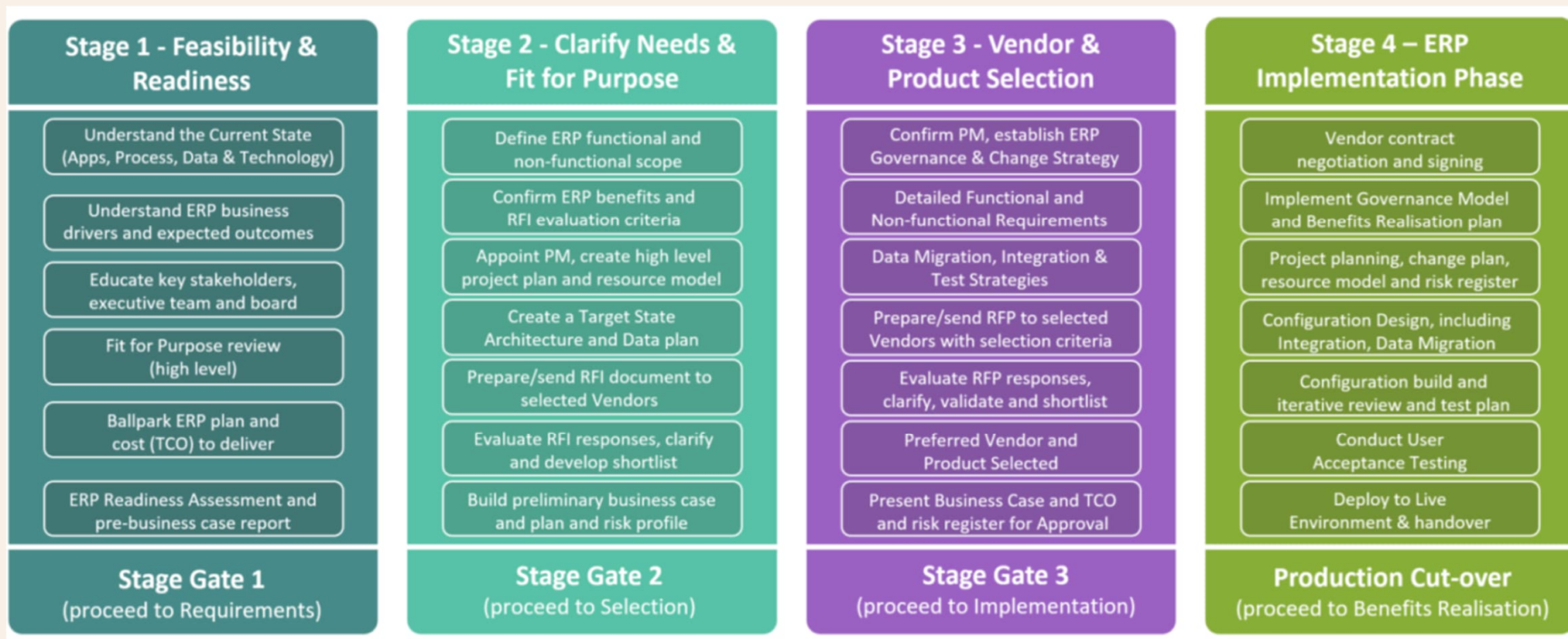
1. Budgets based on Datascape solution estimates
2. ERP Budget separated out from FRO budget
3. Reserve fund for ERP to be set up based on any available FRO budget 23/24

Next steps

- What options for CIO to progress? Business case required? Report to Council?
- Commitment by SLT and business to ERP replacement and procurement process (including timing)
- Governance structure to be set up for decision making
- Continue to Stage 2 – Clarify Needs and Fit for Purpose of the ALGIM ERP Consortium Pathway (refer next slide)

Note – current collaboration for Stage 1 – Feasibility and Readiness with Far North and Whakatāne Councils.

ALGIM ERP Consortium Approach in Stages



Comments