THE MARYLAND-NATIONAL CAPITALPARK AND PLANNING COMMMISSION

Office of the Inspector General

January 7, 2025

To: Mazen Chilet, Chief Information Officer

        Gavin Cohen, Secretary-Treasurer

        Todd Allen, Corporate Human Resources Director

From: Renee Kenney, CIG, CPA, CISA, CIA   *Renee Kenney*
        Inspector General

        Modupe Ogunduyile, CIG   *Modupe Ogunduyile*
        Deputy Inspector General

        Irith Dror, CISA
        Senior Information Technology Auditor   *I. Dror*
                                                       Irith Dror (Jan 7, 2025 10:45 EST)

Re: Memorandum of Evaluation
        Enterprise Resource Planning Request for Proposal Process, CW-005-2025

Standard

This evaluation has been completed per the *Principles and Standards for Offices of Inspector General - Quality Standards for Inspections, Evaluations, and Reviews*.

Background

The Maryland-National Capital Park and Planning Commission (Commission) is in the process of replacing the current Infor Enterprise Resource Planning (ERP) system. The Commission is soliciting proposals from qualified vendors to provide and implement a single, integrated, SaaS ERP solution across the mega processes of Record to Report (Financial Management), Procure to Pay (Procurement), Hire to Retire (Human Resource Management), Forecast to Budget (Budget Management), and Acquire to Dispose (Asset/Warehouse Management).

The Commission has engaged Info-Tech Research Group (Info-Tech) to assist with the selection of the new system. The Commission is following Info-Tech's methodology for enterprise application strategy, evaluation, and selection, which utilizes a structured approach to determine current and future requirements for the desired solution.

The Request for Proposal (RFP) was released on Nov 20, 2024, providing offerors with the relevant business, operational, performance, application, technical, and architectural requirements for the desired solution.

Evaluation Objective

The primary objective of this evaluation was to determine if the RFP development process, and the resulting RFP document, was comprehensive, clear, and effective in soliciting high-quality proposals that will meet the Commission's needs.

Scope

The scope of this evaluation included a review of the following processes:
- Requirements gathering
- RFP development and draft reviews
- Vendor selection parameters and scoring methodology

Review and Analysis

Requirements Gathering Process

Info-Tech was tasked with defining the scope of the ERP project, identifying the critical requirements, and developing a detailed RFP document.

The Office of the Inspector General (OIG) witnessed all strategy alignment sessions during the week of February 12 to 16, 2024 and observed all requirements gathering sessions and meetings, starting on April 1, 2024, through May 13, 2024.

The requirements gathering process began with identifying stakeholders, consisting of a cross-functional team with representatives from key departments and offices, including the Office of the Chief Information Officer, Department of Finance, Department of Human Resources and Management as well as the 4 operating departments[1].

The requirement gathering process included clearly defining project objectives, using various elicitation techniques to capture requirements, categorizing requirements, analyzing for completeness and consistency, documenting requirements thoroughly, and obtaining stakeholder validation to ensure the gathered requirements accurately reflect project needs.

The OIG reviewed the requirements as they were being developed and finalized, though the formal review was left to the stakeholders. It appeared the requirements were well organized and presented.

The OIG reasonably confirms, Info-Tech followed established guidelines and best practices[2] for requirements gathering and analysis.

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[1] Prince George's County Department of Parks and Recreation, Prince George's County Planning Department, Montgomery County Department of Parks, and Montgomery County Planning Department.
[2] e.g., The International Institute for Business Analysis (BABok) standards for the practice of business analysis.

RFP Development and Draft Reviews

The RFP was developed by Info-Tech together with Corporate Procurement, project sponsors and project team members. The RFP content covered all sections typically expected according to industry standards[3].

The RFP underwent two iterations before its final release. The initial draft RFP was presented for review to sponsors and project team members, starting on August 26, 2024, and ending on September 1, 2024. The initial draft had several stylistic and content presentation issues, necessitating significant improvements in its writing quality. Consequently, the second RFP draft was released on October 14, 2024, for a second review. The second review of the draft RFP took approximately 6 weeks to complete. After each review, Info-Tech revised the draft based on the comments received. The final RFP was issued on November 20, 2024.

The OIG reasonably confirms, the RFP development and review process was well-organized and managed, including a training meeting and training documentation for the reviewers.

Vendor Selection Parameters and Scoring Methodology

The evaluation committee includes a full representation of Commission departments and IT professionals. Evaluation committee membership was approved by the Corporate Procurement Director.

As expected by industry standards, the RFP includes a section on the Project Governance and Evaluation Structure, describing in detail the evaluation steps to be taken in round one, such as the preliminary examination, the detailed offeror response evaluation, the criteria that will be used to evaluate the detailed offeror response, and in round two, the process includes demonstrations, oral presentations, and project team interviews.

OIG Conclusion

The OIG reasonably concludes, the RFP development process appeared to adhere to established industry standards and was conducted thoroughly and methodically to ensure the selection of the best possible ERP solution for the Commission's needs.

No additional OIG follow-up is planned at this time.

CC:
Audit Committee
Dorothy Bailey
Mitra Pedoeem
Ben Williams
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[3] e.g., National Institute of Governmental Purchasing (NIGP), Information Technology (IT) Procurement Series No. 2.

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