



Agenda Action Form Overview

Approval of RFP Award for Organizational Assessment Contract in Preparation for Upcoming Enterprise Resource Planning Implementation

Background/Justification

The Board is requested to authorize the County Manager to execute an agreement with Baker Tilly Advisory Group, LP, to conduct an Operational Assessment Study in preparation for the upcoming Enterprise Resource Planning implementation. The assessment will evaluate operational workflows and workforce capacity needed to support seamless operations during the new ERP infrastructure implementation. Additionally, the evaluation will provide recommendations for process optimization and coordination improvements, with a focus on the Finance and Information Services & Technology Departments.

Durham County stands at a critical juncture as it prepares to implement a new Enterprise Resource Planning system—a transformation that will fundamentally reshape how the organization manages its operations. Successful ERP implementation hinges on whether an organization can embrace such significant change, both structurally and operationally. Recognition of these factors prompted staff to issue a request for proposal seeking expert guidance to assess organizational readiness for a new ERP platform. Baker Tilly Advisory Group was the selected firm from the RFP process.

Baker Tilly Advisory Group is the 10th largest accounting firm in the United States with over 90 years of experience. The company has built a specialized public sector practice serving nearly 4,000 state and local governmental entities nationwide. The proposed engagement will span six months through four sequenced phases, with a total cost of \$133,000.

Phase one begins with intensive project planning and stakeholder engagement to ensure the assessment addresses the County's actual concerns. Phase two involves comprehensive data gathering—deploying targeted surveys, conducting one-on-one interviews with leadership, facilitating focus groups with operational staff, and reviewing relevant documentation to capture both quantitative metrics and the qualitative insights of those who will ultimately determine the ERP system's success. The third phase shifts from current state to future possibilities, incorporating industry best practices and conducting comparative benchmarking with up to eight peer communities to identify organizational structures, staffing models, and workflows that have proven effective elsewhere. Finally, the engagement culminates in detailed, actionable recommendations spanning organizational structure, staffing requirements, and implementation roadmaps—not just for the immediate transition period, but to position Durham County for continued operational excellence in the years ahead.

The deliverables from this assessment will provide County leadership with a comprehensive analysis of current organizational capacity, specific recommendations for immediate action, and a sustainability roadmap ensuring this investment yield long term benefits.



Policy Impact

This action does not require adjustment to current Board policies.

Procurement Background

Type of purchase

- ☐ Goods
- ☒ Services
- ☐ Architect, Engineer or Surveyor Services
- ☐ Construction and Repair

Did this request for purchase go through a bid process? Yes ☒ No ☐

Goods: Bids required if $\geq \$30,000$, BOCC approval if $\geq \$90,000$

Services: Bids required if $\geq \$30,000$, BOCC approval if $> \$40,000$

Construction/Repair work: Bids required if $\geq \$30,000$, BOCC approval if $\geq \$500,000$

Fiscal Impact

Funding for this project is in the existing Finance Department budget. The assessment will identify resources needed to support impending Enterprise Resource Planning infrastructure.

Recommendation

The County Manager recommends that the Board authorize the County Manager to negotiate with the vendor and approve the contract following review by the County Attorney's Office. The \$133,000 contract will be funded through existing Finance Department funds.