

**SCARBOROUGH  
MAINE**



# **REQUEST FOR PROPOSALS**

**122026**

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|------------------------------------|
| <b>Budget Preparation Software</b> |
|------------------------------------|

## **Town of Scarborough**

P.O. Box 360

259 U.S. Route One

Scarborough, Maine 04070-0360

Released on August 11, 2025

Proposals Due on September 4, 2025

## Request for Proposals

### Instructions:

Sealed Proposals will be received in the Town Clerk's Office, Scarborough Town Hall, 259 US Route 1, Scarborough, Maine 04074 **until 10:00 am on September 4, 2025** from parties interested in providing a submittal package for the Town of Scarborough Budget Book Application System Requirements.

The proposals, if mailed, should be addressed as noted below: Faxed proposals will not be considered.

Attention: Town of Scarborough, Purchasing Agent  
Request for Proposal (RFP) Number: 122026  
Budget Book Application System Requirements  
259 US Route One  
PO BOX 360  
Scarborough, ME, 04070-0360

The Town reserves the right to accept or reject any and all proposals.

These proposals will not be publicly opened.

A Vendor's failure to submit its proposal prior to the deadline will cause the proposal to be disqualified. Late proposals or amendments will not be opened or accepted for evaluation.

All proposals submitted shall become property of the Town of Scarborough and will not be returned.

### Contact Information:

For questions related to the RFP process:

Kim Morrison, Purchasing Specialist  
Email – [kmorrison@scarboroughmaine.org](mailto:kmorrison@scarboroughmaine.org)  
Phone 207-730-4083 / Fax 207-730 4088

The preferred contact method is email. All inquiries or requests concerning this Request for Proposals shall be made in writing and must be received before the close of business two days prior to the deadline to the attention of Kim Morrison, Purchasing Specialist. The Town is not responsible for oral interpretations given by any Town employee or representative.

Prospective bidders are responsible for registering with the Purchasing department in order to receive any amendments or addendums to the Proposal.

**APPENDIX A**  
**TOWN OF SCARBOROUGH BUDGET BOOK APPLICATION**  
**SYSTEM REQUIREMENTS - as of July 21, 2025**

| <b>FUNCTION</b>                     | <b>DESCRIPTION</b>                                                                                                                                                                                                                                                                                                                                                                                | <b>PRIORITY</b> |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <b>Cloud Based</b>                  | Hosted securely in the cloud                                                                                                                                                                                                                                                                                                                                                                      | A               |
| <b>Calculations</b>                 | The ability to calculate Property Tax Mill Rate based on current year's budget                                                                                                                                                                                                                                                                                                                    | B               |
| <b>Multi Budget Types</b>           | The ability to create two or more budget types based on account definition (Operating, Capital, etc.)                                                                                                                                                                                                                                                                                             | A               |
| <b>Notifications/ Collaboration</b> | <ul style="list-style-type: none"> <li>▪ The system will provide automated notifications to end-users when comments are added.</li> <li>▪ Add notes to-do items</li> <li>▪ Assign specific sections to specific users</li> <li>▪ Move pages from workflows</li> </ul>                                                                                                                             | B               |
| <b>Hierarchical Privileges</b>      | <ul style="list-style-type: none"> <li>▪ The solution will provide the ability for staff to set hierarchical privileges, providing users with varying degrees of access based on roles and responsibilities.</li> </ul>                                                                                                                                                                           | A               |
| <b>Automation</b>                   | <ul style="list-style-type: none"> <li>▪ Automate department page summaries</li> <li>▪ Automate Capital Project summaries</li> </ul>                                                                                                                                                                                                                                                              | B               |
| <b>Stages of Budget</b>             | <ul style="list-style-type: none"> <li>▪ Must be able to stage budget in approval process flow: Department Request ⇒ Town Manager Approval ⇒ Finance Committee Approval ⇒ Town Council Approval</li> </ul>                                                                                                                                                                                        | A               |
| <b>Mobile Environment</b>           | <ul style="list-style-type: none"> <li>▪ The vendor provides a mobile environment.</li> <li>▪ The solution must be operating system agnostic e.g., it will run on a laptop or desktop with Windows, an Android tablet, or a phone whether the device be in a mobile unit or on a static desktop.</li> <li>▪ NOTE: understood that this mobile app may come with reduced functionality.</li> </ul> | C               |

| <b>FUNCTION</b>             | <b>DESCRIPTION</b>                                                                                                                                                                                                                                                                                                                                                                             | <b>PRIORITY</b> |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <b>Search Capabilities</b>  | <ul style="list-style-type: none"> <li>▪ Users must be able to search by Department, Fund, and Account type.</li> </ul>                                                                                                                                                                                                                                                                        | C               |
| <b>Reporting</b>            | <ul style="list-style-type: none"> <li>▪ Produce reports by Department, Fund, and Account Type. Create printed Budget Book in PDF form. Financial Compliant Reports (GFOA)</li> <li>▪ Generate print ready PDF's</li> <li>▪ Share full documents or selected sections</li> <li>▪ Reporting should be customizable allowing us to match our existing formatting as much as possible.</li> </ul> | C               |
| <b>Detail Audit Reports</b> | The ability to view and print detailed audit reports on changes made to the budget.                                                                                                                                                                                                                                                                                                            | A               |
| <b>System Integration</b>   | <ul style="list-style-type: none"> <li>▪ Integration Munis for time - payroll and allocations</li> <li>▪ Integrate with and/or the vendor will create a custom API for Fuel Master, the application we currently use for fuel management with Municipal and School vehicles.</li> </ul>                                                                                                        | A               |
| <b>Single Sign On</b>       | <ul style="list-style-type: none"> <li>▪ Solution will preferably provide SSO through Google.</li> </ul>                                                                                                                                                                                                                                                                                       | A               |
| <b>Projections</b>          | <ul style="list-style-type: none"> <li>▪ Solution will generate projections based on predefined parameters (current year - future years)</li> </ul>                                                                                                                                                                                                                                            | B               |
| <b>Training Environment</b> | <ul style="list-style-type: none"> <li>▪ The solution will have a scalable and updatable training environment in conjunction with the production environment.</li> </ul>                                                                                                                                                                                                                       | A               |
| <b>Attachments</b>          | <ul style="list-style-type: none"> <li>▪ Provide users with the ability to attach, store and retrieve files (e.g., PDFs, jpegs, pictures, multi-media, etc.)</li> </ul>                                                                                                                                                                                                                        | C               |
| <b>Security</b>             | <ul style="list-style-type: none"> <li>▪ Data should be encrypted at rest and in transit. Vendor will provide appropriate security audit reports when requested.</li> </ul>                                                                                                                                                                                                                    | A               |
| <b>Modeling</b>             | The solution will enable modeling based on various economic shocks, projected changes in fees and revenue, etc.                                                                                                                                                                                                                                                                                | A               |
| <b>Archived Data</b>        | Ideally, we will be able to import archived data/past budget books and reports.                                                                                                                                                                                                                                                                                                                | C               |

Priority definitions:

A = Solution must have this feature.

B = Solution will ideally have this feature. If feature not available, customer will be looking for an acceptable work around.

C = Feature not critical to choice of solution but may differentiate from other vendors.

Proposal Details:

Proposals must include:

- One [1] original hard copy of with original signatures
- One [1] flash drive with an electronic copy of the proposal. The soft copy must be a PDF file, and shall be exactly the same as the hard copy. Differing versions are subject to disqualification
- Detailed description of the work to be performed, as well as the labor and materials.
- List at least three (3) references from previous customers of similar work.
- Details on when the vendor is available to start the work, as well as the length of time required to complete the project.
- Signed, dated and all contact information from an Officer of the Company.
- Incomplete Proposals will not be accepted.

Evaluation Process

Technical proposals will be reviewed first. The Evaluation Committee will independently evaluate and score the technical proposals received by using the evaluation factors defined below. The factors may not all be given the same weight in the evaluation process. The Technical Evaluation Committee will then use each committee member's evaluation to rank the technical proposals that meet the criteria of this RFP and are deemed capable of fulfilling this RFP.

The scores and ranks will be submitted to the Town's Project Manager.

The Town of Scarborough will review all cost proposals, which will be evaluated using a mathematical formula. The lowest cost proposal will serve as the benchmark and receive the maximum available points. All other proposals will be scored proportionally, based on their relative proximity to the benchmark.

The Town of Scarborough shall then use each committee member's information to numerically rank the Proposals. The Project Manager will then combine the Technical and Cost Scores and will determine the total score for each Proposer.

The Town of Scarborough may ask selected firms to give an onsite demonstration.

The Town of Scarborough may enter contract negotiations with the Proposer with the highest total score. If the Town of Scarborough and a Proposer are unable to enter into a contract for any reason, the Town of Scarborough may begin contract negotiations with the next lowest ranked Proposer.

### **Technical Scoring Criteria**

The technical proposal will be given more weight than the cost proposal as follows:

#### **70% Technical**

25% Technical satisfaction of meeting the Town of Scarborough's requirements

20% Overall responsiveness to the RFP

20% Experience/Qualifications/Past performance on similar projects

#### **30% Cost**

Vendor shall provide detailed pricing including quantities and cost of materials and labor for work proposed in the RFP. Pricing should include all costs returning the work site to the pre-work condition found.

The Town of Scarborough is exempt from Maine Sales Tax which should not be included in the proposal.

#### Standard Terms and Conditions:

The Town of Scarborough reserves the right to amend this RFP prior to the proposal due date. All amendments and additional information will be posted on the Town website:

[www.scarboroughmaine.org](http://www.scarboroughmaine.org). The Town reserves the right to waive any informality in proposals, to accept the proposals or portions thereof, and to reject any and all proposals, should it be deemed in the best interest of the Town to do so. Nothing in this document shall require the Town of Scarborough to proceed with Engineering and/or any of the identified services. The Town reserves the right to substantiate Respondent's qualifications, capability to perform, and availability and past performance record.

The cost for developing the proposal is the sole responsibility of the Consultant. All proposals submitted become the property of the Town.

The Town reserves the right to approve subcontractors. All work performed under contract to the Town becomes the property of the Town in the format specified by the Town.

Payment for agreements for the undisputed purchase of goods or services provided to the Town, will be made within 30 days of the receipt of a proper billing or the delivery of the goods or services to the location(s) specified in the agreement, whichever is later.

The Town of Scarborough is exempt from all Federal Excise Taxes.

The Town of Scarborough is exempt from all State of Maine Sales Taxes.

A Certificate of Insurance is required from all consultants, contractors and vendors doing business with the Town of Scarborough. Within two (2) weeks of the Notice of Award, Consultant must submit a Certificate of Insurance naming the Town of Scarborough as “additional insured.” Failure to furnish the required certificate within the required timeframe may result in the proposal being rejected.

The successful Consultant(s) selected shall agree to defend, indemnify and hold the Town harmless from any and all claims, demands, suits, causes of action and judgments arising from or related to Consultant's performance, including claims of professional malpractice or negligence. Such indemnity shall include the Town's reasonable attorneys' fees as well.

The above referenced indemnity shall be in addition to and as a complement to the below described insurance coverage, which coverage is a mandatory requirement of this RFP and any award hereunder.

Specifically, the successful Consultant(s) shall provide the following coverage(s) and amount(s). Commercial General Liability \$2,000,000.00 Automobile Liability \$1,000,000.00 Workers Compensation \$1,000,000.00 Errors and Omissions \$1,000,000.00 Umbrella Coverage \$2,000,000.00

Proposer List (plus posting on the town's website):

|                |                              |
|----------------|------------------------------|
| ClearGov       | lalfano@cleargov.com         |
| EUNA Solutions | ben.landis@eunasolutions.com |
| Gravity        | dspolidoro@igm.technology    |
| OpenGov        | mmessina@opengov.com         |
| WORKDAY        | rlieb@revelwood.com          |