



# WASHOE COUNTY

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## STAFF REPORT

**BOARD MEETING DATE:** August 22, 2023

**DATE:** August 8, 2023

**TO:** Board of County Commissioners

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**SUBJECT:** Recommendation to approve the Master Services Agreement (“MSA”) between Washoe County and TruEd Consulting, Inc. for the purchase of consulting services to assist in the design, implementation, and training of Anaplan budgeting software for Washoe County in an amount not to exceed [\$360,000] over the 5-year contract term. If approved, authorize the Purchasing and Contracts Manager to execute the agreement. Finance and Technology Services. (All Commission Districts.)

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### **SUMMARY**

The Finance department has recognized a need for a budgeting application to support various budgeting processes and financial analysis for Washoe County. After a thorough review of several products, Finance and representatives from Human Resources and Technology Services wish to engage TruEd Consulting, Inc. as the implementation partner for Anaplan budgeting software. Anaplan is a hosted financial planning application aiming to improve Washoe County’s financial management capabilities and streamline budgeting processes. TruEd Consulting, Inc. will assist in the design, implementation, and staff training of Anaplan software.

**Washoe County Strategic Objective supported by this item:** Fiscal Sustainability

### **PREVIOUS ACTION**

May 16, 2023 – The Board of County Commissioners (Board) adopted the final budget for Fiscal Year 2024 and approved the Capital Improvement Plan (CIP) Summary for Fiscal Years 2024-2028.

**AGENDA ITEM # \_\_\_\_\_**

## **BACKGROUND**

Washoe County utilizes SAP to input, monitor, and maintain the County budget. However, operating budget and CIP requests, budget adjustments, budget book, forecasting, and many other business processes are done manually. As SAP does not have a governmental budgeting solution and only partners with companies to provide that service, Finance submitted a Request for Information (RFI) to provide the County with information on available budget and reporting software tools. The County had ten companies respond to the RFI. Finance, Technology Services and Human Resources had representation in evaluating the RFI submissions and reviewing demonstrations. After a thorough review of each of the products, staff determined that TruEd Consulting, Inc. (“TruED”), with an implementation of Anaplan budgeting software, met the desired requirements. TruED will build the budget request and entry processes, SAP data integration, basic reporting, and personnel modeling in Anaplan based on County requirements.

Key benefits to implementing the Anaplan budget software are:

- Streamline budget processes: Improved coordination among departments fostering improved communication and efficiencies.
- Improved decision making: Analytic tools will empower the decision makers with real-time data.
- Simplified Reporting: Accurate and powerful report generation reducing the need for manual data processing.
- Cloud hosted solutions: Eliminates maintenance and costs supporting additional hardware in house.

## **FISCAL IMPACT**

Sufficient budget authority exists in the FY24 adopted budget in the Capital Improvements Fund (402), Budget Software (PW920233) for the MSA with TruEd Consulting, Inc. in an amount not to exceed \$360,000.

Annual software subscription and maintenance fees for Anaplan will not exceed \$145,000/year for the next three years.

## **RECOMMENDATION**

It is recommended that the Board of County Commissioners approve the Master Services Agreement (“MSA”) between Washoe County and TruEd Consulting, Inc. for the purchase of consulting services to assist in the design, implementation, and training of Anaplan budgeting software for Washoe County in an amount not to exceed [\$360,000] over the 5-year contract term. If approved, authorize the Purchasing and Contracts Manager to execute the agreement.

## **POSSIBLE MOTION**

Should the Board agree with staff’s recommendation, a possible motion would be:

“Move to approve the Master Services Agreement (“MSA”) between Washoe County and TruEd Consulting, Inc. for the purchase of consulting services to assist in the design, implementation, and training of Anaplan budgeting software for Washoe County in an amount not to exceed [\$360,000] over the 5-year contract term; and authorize the Purchasing and Contracts Manager to execute the agreement.”