ATTACHMENT C

ERP Vendor Demonstration Script

Lacey Fire District 3

1. Demonstration Rules

- All finalists should receive substantially identical instructions and time limits.
- Use the proposed product/version and proposed licensing model.
- Identify each capability as Native, Configurable, Third Party, Custom, Workaround, or Roadmap.
- Identify additional licensing, implementation, and recurring costs.
- District evaluators may interrupt and request clarification or a live demonstration.
- At least one ad hoc report must be built live from a blank report.
- Vendors should demonstrate routine end-user processes in a manner that reflects the experience, permissions, number of steps, and level of technical expertise that would reasonably be required of District personnel after implementation.

2. Recommended Demonstration Schedule

Recommended total finalist time: 8–12 hours, divided into two sessions. The District may modify timing while maintaining equivalent requirements for all finalists.

Finance / Fund Accounting

Demonstrate BARS-oriented account structure, fund accounting, journal entry and approval, budget-to-actual, interfund transfer, bank reconciliation, period close, audit trail, and drill-down.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Annual Budget Development

Build a department budget, include salary/benefit assumptions, create multi-year forecast, route approval, process amendment, and produce Board-ready report.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Position Control / New Position

Request a new position, approve the position, recruit for the position, hire a firefighter, onboard the new hire, process a promotion including title and compensation changes (including step increases and technician pay), and process separation.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Monthly Payroll / 40% Draw

Process representative monthly payroll and 40% draw, including overtime, longevity, education incentive, certification pay, HRA/VEBA, deferred compensation, retirement cashout, and benefits.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Payroll Reconciliation

Show pre-payroll audit, approval, GL posting, bank reconciliation, benefit reconciliation, quarterly reporting, and W-2.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Purchasing

Create a requisition, route approvals, issue a purchase order, process a purchase order change request, receive goods/services, process an invoice, create payment, purchase card management, search prior procurements, and create a 1099.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Contract Lifecycle

Create contract, department/finance/legal approvals, electronic signature, spend tracking, amendment, and renewal/expiration alerts.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Project Accounting

Create capital project, establish budget, record commitments/actuals, forecast-to-complete, report status, and close.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Employee Self-Service

Demonstrate employee experience in updating benefits (including deferred compensation amounts), changing address, changing personal information, changing banking, updating W-4 information, adding dependents, requesting leave, and accessing a W-2.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Ad Hoc Reporting

Build live report of employees hired during a District-selected period with budgeted GL accounts, compensation, department, position, bargaining unit, and other fields.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Time & Attendance Scenario

Demonstrate employee experience for time entry, time approvals, delegations for time entry and time approvals, leave requests, and how the time entry flows into the payroll process.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Executive Dashboard

Show budget-to-actual, vacancies, overtime, contract expirations, and capital projects with drill-down.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

AI / Emerging Technology

Demonstrate production AI relevant to finance, HR, payroll, reporting, forecasting, contracts, or workflow; distinguish production, beta, planned, and conceptual.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Administration / Security

Create a user, assign roles for the user, SSO/MFA integration, demonstrate user access based upon role, demonstrate internal control transactional validation by role, update user access, approvals for user creation and edits, audit logs, deactivation of user and security reporting.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

Integration / API

Demonstrate API documentation, representative integration, error handling, monitoring, and future integration approach.

Score focus: completeness, ease of use, number of steps, configuration effort, vendor dependency, reporting, auditability, security, integration, and cost.

3. Required Vendor Disclosure

- Is the capability included in the proposed subscription?
- Native/Configurable/Third Party/Custom/Workaround/Roadmap?
- Additional implementation effort?
- Additional recurring or one-time cost?
- District administrator skills required?
- Vendor assistance required after go-live?
- Known limitations or exceptions?

4. Demonstration Scoring Scale

Score	Meaning	Typical Interpretation	Evaluator Notes
5	Exceptional	Highly intuitive; complete; minimal vendor dependency	
4	Strong	Easy to use; meets need with minor limitations	
3	Adequate	Meets need with material configuration	
2	Weak	Difficult; workaround/third-party dependence	
1	Unacceptable	Does not adequately meet requirement	