ERP Vendor Evaluation – Lacey Fire District 3
Vendor:
Evaluator:

Category	Weight	Score 1-5	Weighted Points	Comments
Functional Fit	0.25			
HR and Payroll Functionality	0.2			
Reporting and Analytics	0.15			
Implementation Approach	0.1			
Vendor Support and Customer Success	0.15			
Future Technology and AI Roadmap	0.05			
Total Cost of Ownership	0.1			
TOTAL	1		0	

Category Detail

Category	Criterion	Score 1-5	Notes
Functional Fit	Finance/fund accounting		
Functional Fit	Budgeting		
Functional Fit	Purchasing/procurement		
Functional Fit	Contract management		
Functional Fit	Project accounting		
Functional Fit	Position control		
Functional Fit	Security/workflow		
Functional Fit	Integration architecture		
HR and Payroll Functionality	Employee lifecycle		
HR and Payroll Functionality	Position control		
HR and Payroll Functionality	Firefighter compensation		
HR and Payroll Functionality	Payroll accuracy		
HR and Payroll Functionality	Benefits		
HR and Payroll Functionality	Employee self-service		
HR and Payroll Functionality	Manager self-service		
HR and Payroll Functionality	HR reporting		
Reporting and Analytics	Ad hoc reporting		
Reporting and Analytics	Financial reporting		
Reporting and Analytics	HR/payroll reporting		
Reporting and Analytics	Dashboards		
Reporting and Analytics	Drill-down/auditability		
Reporting and Analytics	BI integration		
Reporting and Analytics	Low vendor dependency		
Implementation Approach	Methodology		
Implementation Approach	Schedule		
Implementation Approach	Data conversion		
Implementation Approach	Testing/parallel payroll		
Implementation Approach	Training/change management		
Implementation Approach	Vendor resources		
Implementation Approach	Risk management		
Vendor Support and Customer Success	Support model		
Vendor Support and Customer Success	SLAs/escalation		
Vendor Support and Customer Success	Account/customer success		
Vendor Support and Customer Success	Public-sector references		
Vendor Support and Customer Success	Customer satisfaction		
Vendor Support and Customer Success	Roadmap communication		
Vendor Support and Customer Success	Long-term partnership		
Future Technology and AI Roadmap	Cloud architecture		
Future Technology and AI Roadmap	AI capabilities		
Future Technology and AI Roadmap	AI roadmap		
Future Technology and AI Roadmap	AI data governance		
Future Technology and AI Roadmap	API/integration strategy		
Future Technology and AI Roadmap	10–20 year sustainability		
Total Cost of Ownership	Subscription		
Total Cost of Ownership	Implementation		
Total Cost of Ownership	Third-party transparency		
Total Cost of Ownership	10-year TCO		
Total Cost of Ownership	Escalation protection		
Total Cost of Ownership	Growth pricing		
Total Cost of Ownership	Exit/transition cost		

Demo Scoring

Scenario	Score 1-5	Comments
Finance / Fund Accounting		
Annual Budget Development		
Position Control / New Position		
Firefighter Hire		
Firefighter Promotion		
Monthly Payroll / 40% Draw		
Payroll Reconciliation		
Purchasing		
Contract Lifecycle		
Project Accounting		
Employee Self-Service		
Ad Hoc Reporting		
Executive Dashboard		
AI / Emerging Technology		
Administration / Security		
Integration / API		

Reference Checks

Question	Score 1-5	Notes
Support responsiveness		
Escalation effectiveness		
Would select again		
Implementation schedule		
Implementation budget		
Reporting without vendor		
HR/payroll effectiveness		
System reliability		
Biggest disappointment		
Biggest surprise		
Roadmap communication		
Enhancement responsiveness		

Cost Comparison

Vendor	Implementation	Year 1 Recurring	5-Year TCO	10-Year TCO	Escalation Cap	Notes

Instructions

Use one workbook per finalist or duplicate for each vendor.
Enter 1–5 scores in the applicable sheets.
Weighted points use the RFP's published weights.
Document factual observations and exceptions.
Use consistent reference questions for each finalist.
Evaluate cost as total cost of ownership, not only first-year subscription.