



SERVING THE COMMUNITIES OF
BURLINGAME, HILLSBOROUGH & MILLBRAE

Central County Fire Department

California

Request for Proposals

For Professional Consulting Services for the Central County Fire Department Financial Software Selection

Submit Proposal to:

Central County Fire Department/Town of Hillsborough
Attention: Rich Santiago, Assistant Finance Director
1600 Floribunda Avenue
Hillsborough, CA 94010

Email: rsantiago@hillsborough.net
Phone: (650) 375-7406

Due by Email:

Monday, August 4, 2025
Time: 5:00 p.m. PST
*Proposals will not be accepted after
this date & time*

Central County Fire Department Request for Proposals Consulting Services for Financial Software Selection

i. Introduction

The Central County Fire Department (CCFD) intends to retain a consultant for services described in the Scope of Services outlined below. The Consultant is expected to provide complete, professional, high-quality services and products; consult with CCFD personnel and others who are involved in the project; and to provide the expertise, guidance, advice and assistance in accomplishing the work.

CCFD is requesting proposals from qualified consultants to evaluate and assist in the selection of a financial software application. The initial work to be performed is an analysis of CCFD's software needs and determining an approach to select the best system that fits our operations. The consultant will then assist CCFD by researching suitable software vendors, writing an RFP in conjunction with staff and IT services, facilitating and scripting demos, evaluating vendor materials, developing selection criteria, and preparing an implementation plan, including milestones and target dates. Firms interested in being considered for this engagement are invited to submit proposals.

ii. Background

Central County Fire Department (CCFD) was established in April 2004 through a Joint Powers Agreement (JPA) between the City of Burlingame and the Town of Hillsborough with essential support services provided by the two cities. This partnership and JPA structure promotes more efficient administration and effective delivery of services without the additional overhead of a completely independent JPA agency.

CCFD is governed by a Board of Directors ("Board") consisting of two representatives from each city, representing the cities in determining the level of fire, emergency medical, and disaster preparedness services to be provided by the Department. All major decisions by the Board require ratification by the respective City Councils. In December 2014, the Board entered into a contract for services agreement with the City of Millbrae, including suppression, fire prevention, and administrative oversight and support.

CCFD is an all-risk emergency response and community service organization. The Department's core purpose is to make Burlingame, Hillsborough, and Millbrae safe for all citizens to live and work through the protection of life, property, and the environment. It seeks to minimize risk to people, property, and the environment by responding to all fire, medical, rescue, and hazardous materials incidents. Administrative and nonemergency safety services include fire prevention and hazardous materials regulations, emergency medical services system management, and emergency preparedness and training. CCFD's personnel (103 FTEs) serve the communities with six engine companies and one truck company, strategically located in seven fire stations, and administrative offices that include fire prevention, public education, training, and emergency preparedness. The total service area is 15.51 square miles with a population of 66,045. The value of property protected is in excess of \$16 billion. Legal counsel and accounting services are contracted out to further streamline costs. The City of Burlingame, Town of Hillsborough and City of Millbrae are located in San Mateo County on the western shore of the San Francisco Bay approximately 10 miles south of the City of San Francisco and 30 miles north of San Jose.

Please visit <https://ccfd.org/> to find out more about CCFD.

iii. Current Technology Description

CCFD financial software system use is for general ledger, general billing/accounts receivable, and accounts payable. The software also handles the cash receipting of fire permits, and other various transactions. CCFD's finance department currently uses Tyler Technology Fund Balance for financial and accounting software. All accounting transactions are submitted to the finance department for processing. There are many transactions in the general ledger that are not automated and require manual entry from finance staff. Fund Balance software was initially implemented prior to 1999. CCFD's payroll financial system is Kronos and is not expected at this time to be within the scope of the new software system. Fund Balance is going to sunset in December 2026, so it is vital that CCFD identifies the next software platform to transition and implement. The goal of CCFD is to replace its aging financial system with a new system that utilizes best practices, automated workflow, and applications suitable for its organization.

CCFD currently operates within a Microsoft Windows Server 2012 Active Directory (AD) domain environment. The domain is configured in a single forest topology with a root domain and one subdomain, enabling centralized identity and access management. The domain functional level is scheduled to be upgraded to Windows Server Domain Functional Level 2016 by the end of July.

The Fund Balance server remains on Windows Server 2012, as the vendor has confirmed they are unable to support a newer operating system at this time. The server infrastructure is hosted in a VMware-based virtual environment located at the Town of Hillsborough (Town Hall), consisting of three ESXi 6.7 hosts configured in a vSAN hyper-converged infrastructure. The Town of Hillsborough is in the process of approving licensing to upgrade to ESXi 8.0. This infrastructure supports high availability, fault tolerance, and efficient storage management.

Key Workloads in the Environment:

- Microsoft SQL Server 2019 for database operations
- Various line-of-business applications and application servers

End-users rely on Microsoft Office applications (Word, Excel, PowerPoint, and Outlook) for daily productivity. Data protection is managed through Veeam Backup & Replication, which performs nightly incremental backups and weekly full backups to ensure system resilience and data recovery readiness. Eaton & Associates provides comprehensive support for all desktops, servers, and network infrastructure within the environment.

iv. General RFP Information

CCFD's designated team will evaluate the proposals. During the review process, CCFD reserves the right to clarify information and allow for corrections or errors or omissions. All proposals are due no later than 5:00 p.m. PDT on August 4th, 2025. CCFD will not be responsible for proposals that are delinquent, lost, incorrectly sent to an email address other than those given herein, or for any technical issues outside of CCFD's control.

Proposals will only be accepted electronically via email to Rich Santiago, Assistant Finance Director, at rsantiago@hillsborough.net. The cost proposal portion of the submittal must be emailed as a separate attachment from the main proposal or sent as a separate email. Files should be in PDF format and no larger than 25 megabytes.

v. RFP Questions

Rich Santiago, Assistant Finance Director, will be CCFD's project manager and will have overall responsibility and accountability for the project. Jan Cooke, Finance Director, will also work with the consultant during the process.

Please submit questions by email to rsantiago@hillsborough.net by July 21, 2025.

Contact information for questions:

Rich Santiago
Tel No. 650-375-7406
Email: rsantiago@hillsborough.net

IV. Schedule

Central County Fire Department reserves the right to make changes to the schedule below, but plans for the RFP process are as follows:

July 21	Deadline for submitting questions
July 23	Questions will be answered and sent
August 4	Deadline for submitting RFP
Week of August 11	Interviews
Target September 10	Fire Board approves agreement

V. Proposal Format

The proposal will contain the following:

Technical Proposal

- a. **Approach to the Project.** Describe your firm's approach to this project and any special ideas or suggestions that you think might make the project proceed smoothly.
- b. **Qualifications and Experience.** Describe the experience of the firm and of the individuals assigned with related projects of a similar nature
- c. **Schedule.** Describe your plan/schedule for completing the work.
- d. **References.** Provide at least three (3) recent references for projects of a similar nature to this project. Please provide name, address, telephone number and email address.

Cost Proposal (submit as a separate email or attachment) - A separate cost proposal shall include an estimate of hours and costs to complete the services as described in this Request for Proposal. The estimate should be an itemized staffing breakdown in spreadsheet form, indicating personnel classification, hours and costs for each Consultant team member for each work task, and indicating the hourly rate for each personnel category used.

VI. Evaluation of Proposals

Proposals are evaluated using the criteria outlined in this document. Contract award is based on price and a combination of factors that are in the best interest of CCFD. CCFD reserves the right to make investigations, as it deems necessary to determine the ability of the proposer to provide the services meeting a satisfactory level of performance in accordance with CCFD's requirements. The adequacy, depth, and clarity of the written proposal will influence the evaluation. CCFD reserves the right to reject any and all proposals for any reason deemed appropriate by CCFD.

VII. Services Required

A. Scope of Work

The following are the types of services that the consultant may need to perform; however, if additional services are needed, the consultant needs to indicate them in the proposal. The Consultant will be expected to manage a software selection process and position CCFD to implement a new systems application initiative. Specific requirements include the following:

1. **Work Plan.** Develop a work plan which includes milestones and a timeline. The timeline should be driven by CCFD's need to implement a software solution by April 2026 for the transition to Fiscal Year 2026-2027.
2. **Needs Assessment.** Work with CCFD staff and management to determine requirements for the financial system. This should include an evaluation of all features and function requirements for the software. CCFD prefers "off the shelf" application where practicable. Consultant will be expected to review related documentation, interview CCFD staff, managers and IT staff, and utilize information gathered to develop a written plan, specification document and Request for Proposal to be used by software vendors. The consultant will also be expected to include functional recommendations aimed at improving financial office automation, project management tools and tools for reporting and budgeting.
3. **Vendor Research.** Evaluate software vendors and conduct research to identify software providers best suitable CCFD's objectives. The deliverables from this effort would need to include a matrix and other information which describes key elements of each software vendor and present this information to CCFD staff for consideration.
4. **Software Demos.** Prepare demo scripts representing CCFD business processes. The purpose of the demos is to assist CCFD staff in understanding and evaluating the functionality of each software vendor. The consultant will facilitate the demos and post demo discussions with CCFD staff. If there are cities that went through the same implementation, a possible interview could be conducted as well.
5. **Software Selection.** Provide materials useful in evaluating all aspects of the software vendors, including CCFD's needs requirements, implementation needs and post implementation support. Although the selection decision on the software will be made by the CCFD, it is expected that the consultant will present the software recommendation to the executive staff and the Fire Board.
6. **Software Contract.** Support CCFD in reviewing the software contract, including licenses, maintenance, training and implementation services. Assistance may be required with contract negotiations.

B. Project Requirements Delivered by the Consultant

The project proposal should be prepared to include the following information:

1. **Transmittal Letter.** A letter signed by an authorized representative clearly stating the firm's understanding of the work to be performed and its capabilities to meet CCFD's objectives. The letter should include an affirmative statement that the firm is independent of software vendors and in no way profits from the selection of one firm over another. Mention recent certifications, recognitions or awards the firm has received.

2. **Qualifications and Experience.** Describe the qualifications of the firm, focusing particularly on experience in completing similar engagements for public agencies of similar scale and objectives. A minimum of three specific examples is preferred.
3. **Project Manager.** Provide a professionally oriented bio of the principal project manager to be assigned throughout this engagement. The bio should highlight experience most relevant to this engagement.
4. **Approach.** Describe the general approach if your firm is selected for this engagement, including key tasks, deliverables, anticipated level of effort and timelines consistent with the Scope of Services.
5. **References.** Provide three (3) comparable references, including name and contact information.
6. **Fee Information.** Describe the fee terms to perform the scope of services.

C. Services to be Provided by the Central County Fire Department (CCFD)

The services to be provided by CCFD include, but are not necessarily limited to the following:

1. Furnish all reasonably available information, including financial software information and reports, IT related information and any budget related plans.
2. Provide staff available to conduct the needs assessment across all the various aspects of the current software needs.
3. Provide staff support and assistance as required.

D. CCFD Requirements

The selected consultant must comply with all relevant CCFD requirements, such as obtaining a business license, providing proof of insurance for at least the minimum required amounts, and executing CCFD's professional services agreement (PSA)

Attachment A: Central County Fire Department Professional Services Agreement