

Utah Telecommunication
Open Infrastructure Agency



Request for Proposal
Software Enterprise Resource Planning
RFP # ERP-2026IT-001

February 5, 2026

The Utah Telecommunication Open Infrastructure Agency (“UTOPIA” or “UTOPIA Fiber”) invites qualified respondents to submit a request for proposal (RFP) for software enterprise resource planning (ERP).

All submissions must be received by **5:00 P.M. Mountain Time on March 13th, 2026**, via **email** to Blaine Clegg (bclegg@utopiafiber.com). **PROPOSALS SUBMITTED AFTER THE DEADLINE WILL NOT BE CONSIDERED.**

Please use email to direct all questions to Blaine Clegg (bclegg@utopiafiber.com). Any questions received will be recorded, answered, and provided to all respondents.

UTOPIA FIBER

Request for Proposal

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1.1 Introduction

UTOPIA Fiber is requesting proposals from suitable qualified and experienced candidates for a software solution for enterprise resource planning (ERP).

This software solution will be divided into two phases. The first phase should be designed and will be used to manage the UTOPIA Fiber financial, inventory control and job costing systems. The second phase will be used to manage process and customer relationships.

Based in Murray, Utah, UTOPIA Fiber, also known as the Utah Telecommunication Open Infrastructure Agency (UTOPIA), is an open-access fiber-optic network that was founded by 11 Utah cities in 2004 with the mission to bring a fiber-optic connection to every resident and business in their communities!

Since its inception in 2004, UTOPIA Fiber has expanded to include 20 Utah cities, and four operational partners, and the growth continues. Additional Information about UTOPIA Fiber is located at: <https://www.utopiafiber.com/>

Entity Structure/Partnerships

- Utah Telecommunications Open Infrastructure Agency (UTOPIA)
 - Idaho Falls Fiber, Idaho Falls City, ID (partner network)
 - Golden State Connect Authority (GSCA) (partner network)
 - Yellow Stone Fiber, Bozeman MT (partner network)
 - Bountiful Fiber, Bountiful UT (partner network)
- Utah Infrastructure Agency (UIA)

Company Information

Number of Employees	110
Annual Revenue	\$76 Million
Number of Office Locations	2
Avg. Transaction Volume (per month)	85,000

Current System Landscape

- See System Landscape Document for Schematic

System	Keep/Replace	Purpose
Microsoft GP	Replace	Accounting
OpenSource / Perfex	Replace	CRM & Ticketing System
SmartSheet	Replace	Project Management
Stampli	Optional – Replace	AP Automation
Express Bill Pay	Optional – Replace	Payment Processing
Tableau	Keep	Data Analytics
SSRS		Reporting from GP
WennSoft (Key2Act)		Project Accounting
Key2Act		Fixed Assets and Loan Amortization
Zinier	Keep	Scheduling for Field Service Management
Netbox		Network Inventory System
iPen		IP Address Management
Zavvix		NMS
IAPI	Keep	Internal API Middleware System
ESRI		Geographical Information System / Maps
ACS		Manages Equipment
Workflow Automation Systems		Workflow automation
Concur	Optional – Replace	Expense Management
Visa Clarity		Corporate Cards
Zoom Contact Center	Keep	Phones, SMS, Webchat
Podium		Online review management
Postmark		Transactional Emails (scheduling reminders)
Outlook	Keep	Email
APS/E-Self Serve		Payroll & Time Tracking

1.2

Statement of Need, Evaluation Criteria and Scoring

UTOPIA Fiber is issuing this RFP to identify providers and evaluate their methodologies for the ERP implementation project outlined below.

Respondents are encouraged to use the information provided in this document to develop a responsive proposal that aligns with the statement of need and evaluation. All proposals should follow the guidelines outlined below and address the information contained herein.

Proposals will be evaluated based on the criteria below. Each section is assigned a weighted point value. Respondents should structure their proposals to align with these categories.

UTOPIA Fiber reserves the right, at its sole discretion, to review, accept, or reject any or all responses, to request additional information or clarification, and to modify or withdraw this request at any time without notice. This request is issued solely for exploratory purposes only and does not constitute a solicitation, offer, or a commitment to purchase products or services. Participation in this process does not create any obligation, contractual expectation, or entitlement to compensation, nor does it obligate UTOPIA Fiber to proceed with any respondent or submission.

1.3

Objectives and Requirements

Key Objectives

UTOPIA seeks to procure and implement a modern, enterprise-grade platform that resolves existing operational, technological, and data governance challenges while enabling long-term scalability, efficiency, and transparency across all subsidiaries and operational units.

- Platform Modernization and Sustainability
 - Replace the legacy Microsoft Dynamics GP environment with a future-proof, cloud-based enterprise platform that is fully supported, continuously updated, and capable of evolving with organizational growth and regulatory requirements.
- Unified Inventory and Asset Management
 - Implement fully integrated inventory and fixed asset management capabilities to ensure accurate tracking, lifecycle visibility, and financial accountability across all locations, including California operations.
- End-to-End Process Automation
 - Deliver an integrated, automated workflow spanning procurement, warehouse, logistics, field operations, and financial reconciliation to eliminate manual processes, reduce errors, and improve operational efficiency.
- Cloud Accessibility and Mobility
 - Provide secure, cloud-native and mobile-enabled access that supports remote, field, and multi-location users while maintaining consistent performance and

usability.

- System Integration and Interoperability
 - Support API-driven architecture enabling seamless, real-time integration with existing internal systems and third-party applications while preserving current automation investments.
- Centralized Data Governance and Single Source of Truth
 - Establish a unified data environment that eliminates silos, prevents duplication, ensures data consistency, and delivers a trusted single source of truth across all business functions.
- Advanced Reporting and Analytics
 - Provide robust, real-time reporting, dashboarding, and analytics capabilities that improve operational visibility, financial oversight, and executive decision-making across subsidiaries and ISP partners.
- User Adoption and Experience
 - Deliver an intuitive, modern, and role-based user experience that promotes adoption, improves data quality, and increases confidence among internal users and external stakeholders.
- Customer Transparency and Engagement
 - Enable customer-facing functionality that supports service visibility, order tracking, communications, and branded billing experiences to improve satisfaction and trust.
- Security, Compliance, and Data Segmentation
 - Ensure enterprise-grade security, role-based access controls, auditability, and strict data separation between subsidiaries, partners, and customers in compliance with best-practice governance standards.
- Scalability and Multi-Entity Support
 - Support multi-subsidiary, multi-entity, and multi-partner operations within a single platform while allowing independent configuration, reporting, and access controls.
- Long-Term Operational and Financial Risk Reduction
 - Reduce financial, operational, and compliance risk through improved accuracy, automation, visibility, and system reliability.

Key Requirements

UTOPIA Fiber will implement the selected solution through a phased approach to ensure a smooth deployment that meets immediate organizational needs while supporting future growth and expansion. This approach allows UTOPIA to prioritize critical functionality in the initial phase while maintaining a clear path for subsequent enhancements. The proposed solution should be flexible and scalable, capable of supporting both current requirements and additional capabilities outlined for future phases without significant rework or disruption.

Functional Requirements

See **ERP Requirements Matrix** spreadsheet for detailed requirements. Below is a summary of key business cycle requirements:

- Modern Financial Accounting and Reporting
 - General ledger and financial reporting
 - Accounts Receivable
 - Accounts Payable
 - Bank Reconciliation
 - Month-end Close and Reconciliation
 - Fixed Asset Management
 - Budgeting, Planning, and Forecasting
 - Multi-entity management and Intercompany Transactions
 - Global Chart of Accounts
 - Global Vendors
 - Consolidated Financial Reporting
 - Overall:

Best-in-class financial accounting solution to support the key accounting cycles of the business. This should include a solution that is strong in multi-entity management, allows for integrated billings, and makes use of modern technology for AP and spend automation. Other accounting processes should be as automated and streamlined as possible.

- Procure to Pay
Ability to support PO process, approval routing, support OCR and AI-based image recognition to simplify or eliminate scanning of documents and obtain the spend approval to the appropriate person in a timely manner. Distributions should be simplified for maximum efficiency while ensuring maximum oversight.
- Plan to Build
Address how the proposed solution would use your software to define specifications for a construction build-out, plan material procurement, labor costs, and facilitate conversion into inventory or a capital asset. The manufacturing features must allow for BOM management, routing management, picking, and return-to-stock procedures.
- Project to Completion
Demonstrate ability to perform project costing with a budget and assignment or allocation of costs for labor, materials, and other passthrough expenses. These job costs must be able to

flow into a construction in process flow or be used for small low-touch project/job tracking. Project billing must be supported.

- **Invoice to Cash**
Provide a solution to generate customer invoices both internally and automatically from external systems. This should be a no-touch or low-touch streamlined process with the ability to integrate payment processing seamlessly from the ERP system.
- **Inventory and Warehouse Management**
Provide a system that can streamline inventory management, automate the entire process, facilitate receiving and put-away, moving, picking, shipping, and costing inventory in a way that is streamlined, allows for use of scanning devices, and facilitates inventory management across various legal entities in a single system.
- **Grant Management**
Provide a solution to track grant requirements, comply with fiscal year tracking and grant stipulations, in addition to the standard expectation of clean reporting and expense attribution to a Grant ID.
- **Reporting**
Provide a solution that empowers users to produce or edit their own reports, perform analytics on operational and financial data, and prompt users on exceptions and key metrics.
 - Business Intelligence and Analytics
 - Management and Ad Hoc Reporting
- **Integration Management**
Integrate the solution with any number of external systems through API, FTP, or other web services.
- **System and Security**
Include Two-factor authentication, single-sign-on, SOC 2 report, highest level of encryption, 99.99% uptime, and a Cloud-based system that is very accessible and secure.

Extended Capabilities and Scalability Requirements

- **Lead and Opportunity Management** – Verify that the solution can support traditional CRM processes such as lead management, opportunity management, pipeline reporting, and managing various customer interactions along the way.
- **Case Management** – Verify that the solution can support a ticketing system that facilitates workflows and interactions with customers, including notifications, note taking, and escalation in addition to the standard case management features.
- **Service Order Management** – Verify the solution can support recurring service orders, attaching service requests to equipment, automating reminders for service orders, and integrating this to field service management.
- **Field Service Management** – Verify the solution can support technicians in the field being able to transact using mobile devices easily and efficiently.
- **Resource Management** – Ability to manage resources to carry out jobs/projects and consider constraints such as hours, skills, and location is of interest.

1.4 RFP Contents – Requirements for Response

Your response must consist of a completed and executed response in the format detailed in this RFP. Your response submission must include the following:

1. One electronic copy (via email) submitted to bclegg@utopiafiber.com.
2. Response to **Attachment A: UTOPIA_ERP Requirements_Template.xlsx** in the same format (MS Excel – not PDF) as presented.
3. Response to the request for **Attachment B: Additional Vendor and Solution Information** in PowerPoint, PDF, or video format.
4. Overall response to the items listed as key objectives and requirements.

1.5 RFP Questions

Respondents that have questions must provide those questions to Blaine Clegg (bclegg@utopiafiber.com) by email no later than 5 business days before the RFP ends. UTOPIA will answer questions within 3 days after submittal. Questions and answers will be placed on the UTOPIA Fiber website as RFP-ERP-2026IT-001.xls

1.6 Payment Terms

UTOPIA Fiber will be issuing purchase orders (PO's) for software. UTOPIA Fiber uses the term NET30 for payment of invoices. Payment will be in US Dollars only. UTOPIA Fiber will issue

payments for NET30 terms at the later date of invoice/s received, or material received.

1.7 Response Material Ownership

All material submitted regarding and in response to this RFP becomes the property of UTOPIA Fiber and will only be returned to the respondent at UTOPIA Fiber's option. Any person may petition to review responses after final selection has been made. UTOPIA Fiber has the right to use any or all system ideas presented in reply to this request, subject to limitations outlined below in "Proprietary Information." Disqualification of a respondent does not eliminate this right.

1.8 Confidentiality and Non-Disclosure

Respondents agree to maintain the confidentiality of all proprietary and confidential information of UTOPIA Fiber related to the project.

Respondents shall not disclose or use any confidential information, for any purpose other than the performance of the services outlined in this RFP.

1.9 UTOPIA Fiber Business Hours

UTOPIA Fiber's business hours are from 8:00AM to 5:00PM MST/MDT, Monday through Friday. Awarded vendor will be responsible for coordinating with UTOPIA Fiber personnel during these times.

1.10 Financial Security and Stability

Financial Stability and Capacity Requirement

Respondents must demonstrate financial stability, organizational strength, and sufficient financial capacity to successfully deliver and support the proposed solution over the full life of the project. Proposals shall include evidence of the firm's financial health, including audited or reviewed financial statements for the past three fiscal years, disclosure of any material financial risks, pending litigation that could affect performance, and identification of the legal entity responsible for contract performance. The selected vendor must have the financial resources, staffing capacity, and operational resilience necessary to support implementation, ongoing operations, and long-term system sustainability without risk of service disruption. UTOPIA reserves the right to disqualify any respondent that, in its sole judgment, does not demonstrate adequate financial strength or stability to fulfill the obligations of this RFP.

1.11 Evaluation and Scoring

UTOPIA will evaluate each RFP as follows:

1. Verify each RFP submission adheres to the submission requirements set forth in this RFP.
 - This includes the Schedule of Activities, competitive pricing, complete and thorough response to this RFP, availability of qualified personnel and resources, and ability to negotiate expeditiously and in good faith any pricing issues and required contracts.
2. Evaluate the ability for Supplier, and related software, to meet the technical, personnel, and financial requirements of the RFP.
 - Vendors and related solutions will be evaluated against the following criteria:
 - A. Ability to meet the requirements and provide deliverables/documentation as stated throughout the RFP.
 - B. Ability to deliver a successful demonstration, which presents to UTOPIA the ability of the software to meet the specific requirements listed.
 - C. Pricing/Cost – Total Cost of Ownership (“TCO”) of the entire solution (software, hardware, maintenance, and related services).
 - D. Ability to execute an implementation and the ability to deliver a solution “out-of-the-box” without requiring a significant number of customizations.
 - E. The technical architecture of the application and the ability to integrate with any listed software as noted in this RFP.
 - F. Financial stability and viability of your organization.
 - G. Track record of the software product and the ability of the product to be effectively utilized in the past in customer situations similar to UTOPIA.
 - H. Strength of ecosystem including implementation and integration partners, third-party integrations etc.
 - I. References and relevant project history.
 - J. Quality and timeliness of inquiry responses and submissions.
 - Note: UTOPIA has no obligation to reveal how vendor submitted information was assessed.
 - Further meetings/conversations may be scheduled with each supplier to further clarify the RFP or obtain assurance of Suppliers’ qualifications.
3. Invite select vendors to demonstrate the processes supported by the Supplier solution to evaluate fit, usability, and reach of the software.
 - Coordination will be performed with each of the selected vendors individually to conduct this process. UTOPIA reserves the right to select which vendors will participate in demos after the review of RFP responses.

Scoring is based on the below percentages:

Evaluation Criteria	Percentage of Score
Ability to meet the requirements and provide deliverables/documentation as stated throughout the RFP.	20%
Ability to deliver a successful demonstration, which presents to UTOPIA the ability of the software to meet the specific requirements listed.	15%
Pricing/Cost – Total Cost of Ownership (“TCO”) of the entire solution (software, hardware, maintenance, and related services).	30%
Ability to execute an implementation and the ability to deliver a solution “out-of-the-box” without requiring a significant number of customizations.	5%
The technical architecture of the application and the ability to integrate with any listed software as noted in this RFP.	5%
Financial stability and viability of your organization.	5%
Track record of the software product and the ability of the product to be effectively utilized in the past in customer situations similar to UTOPIA.	5%
Strength of ecosystem including implementation and integration partners, third-party integrations etc.	5%
References and relevant project history.	5%

Quality and timeliness of inquiry responses and submissions.	5%
Total	100%

Awardees and non-awardees will be notified by email no later than seven business days after RFP ends.

1.12 Proprietary Information

UTOPIA Fiber is subject to the disclosure requirements of the Government Records Access and Management Act (“GRAMA”), Title 63, Chapter 2, Utah Code Annotated. UTOPIA Fiber generally considers Agreements, Contract Documents, and all accompanying material to be public and subject to disclosure. A written claim of confidentiality and a concise written statement of reasons supporting the claim must accompany any material considered by respondents to be proprietary. Blanket claims that the entire Agreement or Contract Documents are confidential will be denied by UTOPIA Fiber. UTOPIA Fiber cannot guarantee that any information will be held confidential. Under Section 63-2-304 of the Government Records Access and Management Act, if a respondent makes a claim of confidentiality, UTOPIA Fiber, upon receipt of a request for disclosure, will determine whether the material should be classified as public or protected, and will notify the respondent of such determination. UTOPIA Fiber agrees to hold all information classified as protected in confidence and protect it from public disclosure in accordance with such statutes to the greatest extent permitted by Utah law. UTOPIA Fiber may disclose such information to the extent required by law; however, UTOPIA Fiber shall provide respondents prompt notice of a request for disclosure of such protected information and shall cooperate with respondents in seeking the issuance of a protective order.

Respondents are entitled under the Government Records Access and Management Act to appeal an adverse determination regarding the classification of information. UTOPIA Fiber is not required to notify respondents of a request for non-protected information and will not consider a claim of confidentiality unless the respondent’s claim of confidentiality is made on a timely basis and in accordance with the Government Records Access and Management Act.

ATTACHMENT A

Technical and Functional Response

Vendors must review and supply an answer to each requested line-item requirement in the accompanying Excel workbook (UTOPIA_ERP Requirements_Template.xlsx) also known as Attachment A when responding to this RFP.

When addressing these requirements, the vendor should be sure to identify instances in which their product will require customization, use of a 3rd party software or vendor, areas which may cost more beyond base/subscription fee or will not be able to meet the required functionality.

The Table of Contents (“TOC”) tab within the Attachment A workbook provides additional instructions necessary to effectively complete the Attachment A request.

ATTACHMENT B

Additional Vendor and Solution Information

Please provide the following information in PowerPoint, PDF, or video format for our evaluation:

- **Company Overview**
- **Relevant Industry Experience**
- **Solution Overview** – Description of your proposed solution, including key features, functionality, modules, and differentiators
- **Solution Deployment Architecture** – High-level explanation of how your solution is deployed, configured, hosted, secured, and maintained
- **Proposed Project Team** – Roles, qualifications, and bios for the team members who would support this implementation
- **Implementation Methodology** – Overview of your recommended approach, project phases, timelines, deliverables, and risk-mitigation strategies
- **Support Model** – Description of your post-go-live support structure, SLAs, customer service channels, and escalation processes
- **Partner & Ecosystem Capabilities** – Summary of your internal consulting services, VARs, integrators, and partner network, including your ability to support global or multi-site operations
- **Client References** – At least two recent references from similar industries, project complexity, or organizational size
- **Pricing Overview (reference to Attachment A)** – Summary of expected costs, including licensing/subscription fees, implementation services, third-party components, and any ongoing support or optional fees

You may also include any additional materials that help demonstrate the strength and suitability of your solution for this project.