



05/18/2022

Addendum 1

RFP for

This addendum is being issued to publish the additional Technical Questions and Answers and to provide required forms to be submitted with consultant's proposals.

Technical Questions:

1.

- 1.1. Due to the scope of this RFP encompassing three pillars, ERP, HCM and Citizen Services, we kindly ask for an extension of 7-14 days as additional coordination of product specialists is needed.
- 1.2. There is an unusually high volume of public sector ERP RFP's with similar a due date deadlines at this time across North America. These are very complex solutions requiring many specialize resources across software and implementation vendors to support a high quality proposal efforts. Therefore, we would like to request a 2-3 week extension to your due date so that we can provide the best possible response.

A) The deadline will be extended by 1 week to June 2, 2022 at 3:00 pm EDT.

2. Exhibit A, #45, Letter k: in what capacity does the City use Tolemi BuildingBlocks? Sounds like you are wanting to consolidate (GIS) maps? Could you provide some more detail to this?

A) Tolemi is used to consolidate data from various sources including Eden, the city's data warehouse, Fire/EMS, county agencies, etc. into our most comprehensive property data GIS map. The major strength of the tool is the power to filter property data in unique ways to identify properties that meet desired criteria. The tool is mostly used for identifying problem properties or the owners of problem properties by applying multiple criteria, zoning violations, building code violations, fire calls. etc. Many of the lessons learned from

the Tolemi system could be implemented into other GIS tools the city utilizes, namely filtering. The major struggle in consolidation of the various data is that it is not properly formatted or doesn't have a dependable geographic identifier. Any new ERP should incorporate geographic identification for all data and preference would be to integrate directly with our ESRI Portal environment.

3. How many total employees work for the City annually, including full-time, part-time and seasonal employees?

A) We produce around 1,000 W-2s each year

4. Can you please help us further break down the 175 Named Finance User requirements? We break down pricing in Finance based on specific groups of business functions. This question is specifically for Full-Access vs Self-Service (see below) Users; i.e. full functional access to business modules grouped by the following business functions to manage your business processes;

- A. Total Named Users needed for the City's Financial Accounting, Revenue, Projects and Grants Management functions?
- B. Total Named Users needed for the City's Procurement Management?
- C. Total Named Users needed for the City's Planning and Budget Management?

A) Specific user functions will be narrowed down during the contracting process. We have 175 named users in the current system.

5. In turn, can you also help us estimate Self-Service Users quantities, i.e. supporting users needing access to modules to support roles the following business functions (this is often your total employee count to empower the full organization for financial self-service);

- a. Total ERP Financial Self-Service needed for access to reporting and functions like entering Expenses, Project Resources, Project Tasks, and Project Time and Labor?
- b. Procurement Self-Service Users needed for accessing reporting and entering Questions, Reviewing Contracts and Approvers?

A) We have 798 FTE employees.

6. In calculating conversion cost, is your current software the old Eden software or upgraded? Plus, what database are you currently on?

A) The Eden version is 5.26.1.0 with SQL Server 2016 database

7. We provide a cloud based solution, however, it is suggested that our software be hosted on your local server/network. Will you consider a locally hosted cloud based solution since the internet may cause lost connection issues if the hosted software is outside of your server location, as well as, others hacking in.

A) Yes

8.

8.1. What software solutions have you seen or reviewed before the publishing of the RFP?

8.2. Can you tell us more about who you are evaluating and if you have seen any demos from other groups prior to the release of this rfp?

A) We have not received any demos or presentations prior to issuing the RFP.

9. We only have one city customer in WV as a reference. Will that preclude us from being considered? We have many larger customers with even more complex needs. If we are selected, we act like your "in house" software developers. In short, if your idea grows our software, no charge and we share your idea and upload to all customers monthly. If it is something just for you we will charge a fee and give you a rough idea of cost beforehand. In any event, everyone learns and has access to new ideas with real time monthly releases. This alone has been attractive to both large and small customers knowing some customers are forward thinking while others are in it for the ride. These monthly changes are emailed out to our customers and employees select what email notices they want to receive from one a month to one a week, but not less than monthly.

A) References will be evaluated upon submission and should be similar in size and scope to Charleston.

10. Whom did you hire as a Consultant to help with the ERP Project/RFP?

A) SoftResouces LLC is the City's consultant for the project.

11. What is the general budget set aside for this project pre-RFP?

A) There is no specific budget for the project at this time.

12. How many Unions and CBAs are there?

A) none

13. What system do employees currently request time off in? Is this in scope?

A) UKG/Telestaff is our current timekeeping system. The solution should import from those systems for payroll processing and leave administration.

14. Validating that Benefits are in scope?

A) Benefits Administration as part of Human Resource Management is within the scope of the project

15. Is there a reason you are wanting to keep Trakstar for Performance, Ultimate for Time and Attendance and ApplicantPro for ATS? Would you be open to moving these solutions to a single system for everything with no integrations needed on the HCM side?

A) The City is open to changing the ATS and Performance Management Systems, we aren't under long term contracts with either vendor, these were just the best vendors we found to meet our needs at the time.

The UKG/Telestaff platform was implemented in 2021 after nearly 2 years of programming and testing. We may be open to new solutions but would have to consider the time and cost to implement the current solution before making the decision to move away from it.

16.

16.1. Whether companies from Outside USA can apply for this? (like, from India or Canada)

16.2. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

A) Yes

17.

17.1. Whether we need to come over there for meetings?

17.2. Considering COVID restrictions: Are there any requirements for onsite project team? Can the project be executed remotely? Can the implementation team work from remote locations (in US as well as Offshore)

A) It is anticipated that much of the implementation can be performed remotely but there may be the need for some activities to be performed locally, like training.

18. Can we submit the proposals via email?

A) Yes, per the RPF, proposals should be emailed to Jamie.bowles@cityofcharleston.org

19. What are your expectations and/or requirements about the project start and go-live dates for the new system? Are there any expectations or requirements for project phases?

A) There is not a specific timeline established. Tyler has set Eden's sunset date for March 1, 2027

20. Please specify the locations where project will be conducted; Do you expect to run this project from multiple locations?

A) The City has multiple physical office locations across the City that should be able to access the systems, including employees working remotely from home.

21. Is there any requirement for Single Sign on for the To-Be solution?

A) Per the RFP Key Requirements #38; Single Sign-on via MS Active Directory or SAML is considered Important, but not required.

22. Please highlight any specific challenges that you have today and would like to resolve/achieve with the new ERP system. Other than the ones mentioned in the RFP.

A) The RFP is comprehensive of our needs.

23. Do you have an internal Organizational Change Management lead that can take care of organizational change impact and communications?

A) Our consultants for the project, SoftResources LLC, will assist in change management.

24. Are there any additional compliance requirements apart from the point covered in RFP that we should be aware of?

A) None identified

25. Are there any third party applications and integrations currently in place apart from the one mentioned in the RFP? If yes, can we please get a list of those integrations /systems/Applications.

A) All anticipated integrations are specified in the RFP.

26. Do you have any specific requirements of reporting? Do you use any Data warehousing solution and require integrations? IS

A) We utilize data warehousing for multiple reports and, if the vendor does not have a solution for a specific requirement, then we will need to utilize our data warehouse capabilities.

27. Do you use Time Clock devices today? Do you need any integrations to Time Clock devices?

A) UKG currently handles timekeeping, including time clocks, and is anticipated to be integrated with the system

28. Do you plan to have a team dedicated for this project? Like PM, business analysts and key SMEs? If yes, what percentage of involvement we can assume?

A) The identified project team members are existing City employees that retain their other responsibilities. SoftResources will support the City with implementation project management also.

29. Are there any specific internal audit requirements or HR audit deficiencies that should be taken into consideration when scoping the proposed solution?

A) Internal audit requirement that conforms to the GASB standards.

30. Do you need to track retirees in the new system? If so, how many retirees will be tracked?

A) Current self-administered uniformed retirees are tracked as employees in a separate department for each the Police and Fire systems. Benefits are paid through monthly special payroll runs. Our self-administered pensions systems are closed to new hires as of June 1, 2011 and should never have more than 700 current retirees and active eligible members.

31. Do you have an existing middleware platform (e.g., Boomi, Mulesoft, Informatica, BizTalk, etc.) that must be used for integrations (interfaces) between the new ERP system and other systems? If so, please identify the platform(s).

A) No

32. What scope and volume you are expecting for data conversion from existing to new system? How many years of data does is required to convert to the new ERP system?

A) 3 years of budget and actuals for the general ledger and 3 years of pay and deduction history should be converted.

33. How many state/local jurisdictions do you file payroll returns?

A) WV, KY, and OH for W-2's

34. Would the City of Charleston like to see a multi-year initial contract term option or one-year initial term?

A) Multiyear up to 10 years

35. The RFP mentions to provide estimates for user counts defined in this RFP. Include pricing for both on-premises and SaaS or hosted options if applicable. Are we looking for 2 different proposals/responses stating pricing and solution for on-premise and SaaS or only SaaS will work.

A) Either SaaS or on-premises will work, proposals do not need to include both.

36. What is the user count we are expecting will be using the ERP system?

A) User counts are detailed in the RFP Key Requirements #7.

PROJECT: _____

CITY OF CHARLESTON PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE OR POLITICAL SUBDIVISION:

West Virginia Code § 5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars (\$1,000) in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the **West Virginia Code**. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contracts may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the **West Virginia Code** and who has not submitted that plan to the appropriate contracting authority in a timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the **West Virginia Code** may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted, the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for a price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, the West Virginia Insurance Commission or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.

Under penalty of law for false swearing (**West Virginia Code § 61-5-3**), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

Vendor's Name: _____

Authorized Signature: _____ Date: _____



CITY OF CHARLESTON, WEST VIRGINIA

LOCAL VENDOR AFFIDAVIT

Pursuant to § 2-480 of the Charleston City Code, a Local Vendor may qualify for a competitive advantage applied to its bid when certain conditions are met. One condition requires the vendor to submit this affidavit confirming that **(1)** the vendor has paid all applicable business taxes to the City or has a non-delinquent payment plan with the City, and **(2)** the vendor must state that it has had an active and current business & occupation tax account with the City Collector during the entire one-year period prior to the bid opening.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under the penalty of law for false swearing (W. Va. Code § 61-5-3) that **(1)** the vendor has paid all applicable business taxes to the City or has a non-delinquent payment plan with the City, and **(2)** the vendor has had an active and current business & occupation tax account with the City Collector during the entire one-year period prior to the scheduled bid opening for the procurement listed below.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Corporate Name: _____

Authorized Signature: _____ Date: _____

(Printed Name and Title)

State of _____

County of _____, to wit:

Taken, subscribed, and sworn before me this _____ day of _____, 20 _____.

[SEAL]

Notary Public

My Commission expires _____, 20 _____.

Name of Procurement: _____ Bid Opening Date: _____

PROTEST

In the event that any vendor desires to protest City's selection, such vendor (hereinafter "Protestor") shall submit its protest in writing, which must be received by City within seven (7) calendar days of after City Council approves of the award. Provided that the City Manager reserves the right to extend the time for submission of the protest if he determines it is reasonable under the circumstances.

The written protest must be submitted to the **City Manager's Office, Attention: Jonathan Storage 501 Virginia Street East, Room 101; Charleston, WV 25301.**

Only vendors who have submitted a timely and responsive proposal may protest City's selection. No protest may be filed if the RFP is withdrawn or if all proposals received in response to the RFP are rejected.

Protests shall include the following information:

1. The Protestor's name, address, telephone number, and fax number;
2. The solicitation number;
3. A detailed statement of the legal and/ or factual grounds for the protest;
4. Copies of all relevant and supporting documentation, if necessary; and
5. A statement as to the form of resolution or relief sought.

FAILURE TO SUBMIT THIS INFORMATION SHALL BE GROUNDS FOR REJECTION OF THE PROTEST.

The City Manager may refuse to review any protests when the matter involved is the subject of litigation before a court of competent jurisdiction; if the merits have previously been decided by a court of competent jurisdiction; or if it has been decided by the City Manager in a previous protest.

At the time of submitting the written protest, Protestor shall submit a certified check in the amount of one thousand dollars (\$1,000.00) or bond equal to five percent (5%) of the price of the selected proposal, whichever is greater. In the event the proposal being protested is for contracted services, an estimated average of the contract value will be determined in order to calculate the five percent (5%) bond value. This bonding requirement is designed to protect against frivolous claims and unnecessary expenditures of public funds and to allow City to offset any and all costs, fees, expenses or damages of any kind whatsoever incurred by City as the result of an unsuccessful protest.

In the event the protest is unsuccessful, the certified check or bond will be used by City to recoup any and all costs, fees, expenses, or damages of any kind whatsoever incurred by City and related in any way to the unsuccessful protest. Costs, fees, expenses, and damages shall include, but shall not be limited to, increased costs of labor, materials or services resulting from any delay, professional fees, including, but not limited to, attorney fees, and all costs, fees or expenses of any kind whatsoever related in any way to the unsuccessful protest. By signing this document, Protestor waives the right to receive any money retained by City as set forth herein. If there are any funds remaining after City has recouped amounts

as permitted herein, the remaining funds will be returned to Protestor. In the event Protestor is successful, the full amount of the certified check or bond will be returned to Protestor.

Upon receipt of a timely written protest, City shall provide notice of the protest to vendor selected as the successful bidder (hereinafter "Selected Vendor") and provide Selected Vendor with a copy of the written protest and any documents related thereto. **Selected Vendor will have two (2) business days to file a written response to the protest.** A hearing may be held within five (5) business days of the **date of receipt of the written response to the protest by Selected Vendor**; provided that, City may, in its sole discretion, set the date of the hearing beyond the five (5) day time period specified herein if deemed necessary or convenient to do so by City. If a hearing is held, both Protestor and Selected Vendor will have an opportunity to appear and present evidence and testimony in support of their positions. The hearing will be held before the City Manager or his designee. The department head of the department seeking the RFP and the City Attorney shall be in attendance.

A decision will be made by City within five (5) business days of the hearing. Upon a decision having been made, both Protestor and Selected Vendor will be notified in writing of City's decision.

In the event City's selection is reversed, City will reevaluate all proposals which were originally and timely submitted, in accordance with state and city laws and regulations. During the reevaluation, issues addressed during the protest proceedings may be considered.

Once a written protest is filed, no work will be performed by Selected Vendor until such time as City has rendered a final decision on the protest; provided that, if City, in its sole discretion, determines time is of the essence regarding receipt of the goods or completion of the services to be performed, City may permit Selected Vendor to proceed pursuant to its proposal and any Agreement with City, until/unless the protest is successful.

By submitting a proposal, each vendor agrees that the procedure outlined herein is the exclusive remedy available to challenge/protest the award of a contract to a successful bidder. The decision of the city manager is final and is not appealable. Each vendor further agrees that, in the event any qualified vendor fails to submit a written protest and certified check or bond within the time period specified, that vendor thereby forever waives its right to any further claim, action, or remedy, including, but not limited to, the right to bring an action before any administrative agency or any court of competent jurisdiction.

Vendor Signature

Date