



## **ADDENDUM #1**

**December 3, 2021**

**RFP Title: Enterprise Resource Planning Consultant**

**Owner: County of Wake – Melissa England, Procurement**

**RFP Bid No.: #21-091**

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The following items provide answers to questions that were submitted for RFP #21-091. Wake County answers are in blue.

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1. Are there specific targets for this RFP that the City has related to MWSBE participation at either an aggregate level (i.e., total MBE, WBE and SBE) or for specific categories?  
The County currently does not have any specific MWSBE targets for these types of services.
2. Is the County expecting an Options Analysis to be performed to determine whether the County will retain its existing ERP or go out to RFP for a new ERP or, alternatively, has the County already concluded to go out to RFP for a new ERP?  
The County plans to issue an RFP for a new ERP.
3. Is the County expecting any formal process mapping to include As-Is and To-Be process maps to be performed as part of the project scope?  
The County is expecting a completed fit-gap analysis which will be used to develop system requirements detailing the specific key functionality/requirements for each module required for the ERP RFP.
4. Is the County expecting a formal ERP Needs Assessment report to be developed as part of the Project Scope or to simply document the functional and technical requirements of the County as one of the inputs into an ERP RFP document?  
The County is expecting a completed fit-gap analysis which will be used to develop system requirements detailing the specific key functionality/requirements for each module required for the ERP RFP.
5. Has the County concluded to conduct a single combined software/integrator RFP versus a software RFP followed by an integrator RFP?  
As detailed in the RFP, hybrid or composable ERP solutions as well as traditional single-vendor ERP solutions will be considered during the procurement process. Consequently, the County will work with the selected Consultant to develop appropriate RFP document(s) to support this approach, including appropriate RFP document(s) required for ERP software and systems implementation/integration services.
6. Is there an overall budget that has been established for the project that you are able to share?  
The County has established a budget for this project. The budgeted amount will not be shared at this time.

7. Is there a budgeted amount for the consultant phase of the project that you can share?  
The County has established a budget for this consulting engagement. The budgeted amount will not be shared at this time.
8. Have there been any recent studies related to the City's ERP situation and, if so:
  - a. When was that work performed?
  - b. Who performed that work?
  - c. Can the results of that study be shared?The County in conjunction with our current ERP vendor completed an ERP business process review in the areas of Human Resources, Finance, Employee Maintenance, and Budget in 2019. This documentation will be shared with the selected Consultant after the selection/contract process.
9. What is the proposed start date for the project?  
The County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP.
10. What are the current systems of record for Finance, Human Resources and Budget?  
The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process.
11. What departments would be included in the scope for gathering requirements and conducting interviews?  
Finance, Human Resources, Budget Management Service, Information Services, and select subject matter experts in other user departments.
12. Are there any departments that would not be included in the scope?  
No.
13. Is the County Schools within the scope of the project?  
No.
14. Is the County looking to implement a grants platform?  
The County Finance department is currently assessing options for a grants management platform. Consequently, this functionality will be in scope for the ERP RFP.
15. Will the CSO be involved in the software selection process?  
The County's Chief Information Security Officer will be involved in the software selection process.
16. Is the county expecting interviews to occur with internal staff and external users?  
The County is expecting interviews to occur with internal staff only.
17. Are there reporting and data analytics requirements?  
Yes, the County expects the new ERP platform to have robust reporting and data analytics capability.
18. Are there any systems that will be integrated?
  - a. Are they vendor supported?
  - b. Will communication be going out regarding their input?
  - c. Has funding been allocated for modifications to the interfaces?The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process. This includes vendor support details for integrated systems. The County will work with the selected Consultant to coordinate any

needed communications with the vendors of integrated systems and funding has been allocated for interface modifications.

19. Is there a target date in which you would like to have the following accomplished?

- a. Release of RFP
- b. Decision on selected Solution provider(s)
- c. Start of system implementation
- d. Completion of system implementation

No, however the County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP. Consequently, the County would expect project milestones (RFP release, vendor selection, contract negotiations, system implementation, system go-live, etc.) to occur on a timeframe consistent with a project of this scope as defined in this RFP.

20. Would the County please elaborate on the business drivers for this consulting project?

Please refer to the RFP – Section 1.1.

21. Would the County please summarize the software and tools used in the current ERP systems environment?

***The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process.***

22. Does the County have target timelines for key milestones of this project? For example, date of RFP issuance or date of an implementation kickoff?

No, however the County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP. Consequently, the County would expect project milestones (RFP release, vendor selection, contract negotiations, system implementation, system go-live, etc.) to occur on a timeframe consistent with a project of this scope as defined in this RFP.

23. Does the County have a budget for this consulting project? If so, can it please be shared?

The County has established a budget for this consulting engagement. The budgeted amount will not be shared at this time.

24. Please provide insight into Wake County's current portfolio of enterprise applications supporting the in scope business capabilities. How many applications/systems does the County use today to execute the finance, budget, and human resources processes?

The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process.

25. For the aforementioned applications, please specify the extent to which the applications have been customized and the extent to which documentation is available to justify the business need for the customization.

The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process.

26. How many processes are in-scope and need to be assessed?

To be determined after fit-gap Analysis is completed.

27. Please confirm that the following business capabilities are excluded from scope (based on their exclusion from the list of functional components on page 3):

- Finance: Treasury/Cash Management, Program/Project Management (with a focus on Project Accounting), Grants Management, Supplier Contract Management, and Solicitation Management (e.g., RFX process)?
- Human Resources: Service Delivery, Labor Relations, Workplace Compliance, and Compensation

As detailed in the County's RFP, the functional components listed in section 1.2 (County Overview) are the functional components utilized in the current ERP software platform. The County may include additional functional components in the future ERP RFP based on the fit-gap analysis and review of solution options.

28. Page 3, Section 1.2 (County Overview). Finance is listed as a functional component of the County's current ERP software platform. Within the finance functional component, budget is listed as a sub-component. Budget is also named as a functional component of the current ERP software platform. How does the County define/delineate budgeting at the functional component and sub- component levels?

Budget as a component of Finance: defined as the current year and historical recording and transactional functionality to establish and amend budgets authorized by the Board.

Budget as a functional component: defined as budget planning year(s). I.E. preparation of the base budget, collection of new requests, functionality to realign plan year budgets, etc.

29. Page 4, Section 1.3.1 (Financial Assessment). Please confirm that the Financial Assessment will be delivered following the receipt of vendor proposals (i.e., that the assessment will be based on the latest market data as provided by vendors in response to the RFP). If the Financial Assessment is to be delivered earlier, please specify the reasoning and timing (e.g., initial budgetary estimate needed for Co. Board approval, scheduled for X-Date, prior to the release of the RFP). Note: Many of the cost drivers for the Financial Assessment will be determined as part of the "Process Improvement" task (e.g., functional and technical requirements, systems to be retained and retired, single/monolithic solution or composable solution, "big bang" or functional rollout).

As detailed in the RFP, the County is expecting development of an estimate of the total capital and on-going operating costs associated with an ERP platform replacement as an early deliverable of this engagement in order to meet future year County budgeting requirements.

30. Page 4, Section 1.3.2.1.1 states, "Review of existing ERP systems, functionality, interfaces, and integration points including review of the Country's ERP planning work done to date". Please describe the planning work that has been done to date.

The County in conjunction with our current ERP vendor completed an ERP business process review in the areas of Human Resources, Finance, Employee Maintenance, and Budget in 2019. This documentation will be shared with the selected Consultant after the selection/contract process. The County will also provide the selected Consultant system interface details and available process outlines.

31. Please specify which of the following documents the County has defined and will share (upon award) for review: Guiding Principles, ERP Strategy, Sourcing Strategy, Case for Change, Governance Charter and Processes, and Business Processes.

- Guiding Principles.
- ERP business process review in the areas of Human Resources, Finance, Employee Maintenance, and Budget.
- Draft Governance documentation.
- Some Process documentation.

32. Please specify the currency of the aforementioned documents.  
All within the last 3 years.
33. Please identify any County departments, divisions, or groups that are excluded from scope. Are Wake County Public Schools, police/sheriff, fire, and EMS in or out of scope?  
Wake County Public Schools are out of scope. WC Sheriff, Fire and EMS are part of Wake County Government and are in scope.
34. Page 4, Section 1.3.2.2 (Develop Request for Proposal) – is the County’s procurement/sourcing approach to issue one consolidated RFP for software and implementation services or does the County intend to issue two separate RFPs?  
As detailed in the RFP, hybrid or composable ERP solutions as well as traditional single-vendor ERP solutions will be considered during the procurement process. Consequently, the County will work with the selected Consultant to develop appropriate RFP document(s) to support this approach, including appropriate RFP document(s) required for ERP software and systems implementation/integration services.
35. Page 5, Section 1.3.2.3.6 states, “Prepare a written recommendation for County Board presentation reflecting core project team support for purchase of the finalist(s) ERP system(s)”. Please confirm that the recommendation will be for an ERP system **and** implementation services.  
The recommendation will be for an ERP system and implementation/integration services.
36. Page 15, Section 4.4 (Client References). In addition to providing contact information for the client references, should the Proposer also provide a detailed description of the services that are being provided?  
Yes.
37. Page 15, Section 4.4 (Client References). Can the proposer provide references for previous clients in addition to current clients?  
Yes.
38. Page 17, section 5.2 (Evaluation Criteria). Are the evaluation criteria in the RFP listed in order of importance? If not, please provide the weight of each evaluation criteria. Also, please describe/provide additional clarity regarding the 5<sup>th</sup> evaluation criteria – “other criteria deemed appropriated by the County Project Team”.  
The County is only identifying the high-level criteria and not their associated values/weight at this time.
39. Please specify the resource commitment (from each County functional area, IT, and information security) that the County will make to support the scope of services (as identified in the RFP).  
The County estimates there are approximately 20 functional representatives that will participate in the RFP process and the percentage of availability will vary by requirement. This is a high priority initiative so the County will provide the necessary staff resources as needed.
40. What’s the County’s estimated budget for this project?  
The County has established a budget for this consulting engagement. The budgeted amount will not be shared at this time.
41. What’s the estimated period of performance for this project?  
The County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP. Consequently, the County would expect project milestones (RFP release, vendor selection, contract

negotiations, system implementation, system go-live, etc.) to occur on a timeframe consistent with a project of this scope as defined in this RFP.

42. Please confirm the functional scope areas of Finance, Human Resource and Budget are limited to the subfunctions as described in RFP Section 1.2, County Overview? Could the County please provide a list of the systems presently used to fulfill each of the major functions?

As detailed in the County's RFP, the functional components listed in section 1.2 (County Overview) are the functional components utilized in the current ERP software platform. The County may include additional functional components in the future ERP RFP based on the fit-gap analysis and review of solution options. The County will provide detailed information for the current ERP platform including interface/integration requirements to the selected Consultant after the selection/contract process.

43. Per RFP Section 4.4, Client References, this section requires contact information for "at least three current clients." For purposes of this response, would engagements completed within the last 3 years be considered current?

Yes

44. Per RFP Section 1.3.2, Procurement Assistance, does the County anticipate issuing a single, combined RFP for ERP software and implementation services or separate RFPs for ERP software and systems implementation/integration services?

As detailed in the RFP, hybrid or composable ERP solutions as well as traditional single-vendor ERP solutions will be considered during the procurement process. Consequently, the County will work with the selected Consultant to develop appropriate RFP document(s) to support this approach, including appropriate RFP document(s) required for ERP software and systems implementation/integration services.

45. Per RFP Section 4.5, Cost Proposal, are travel costs to be estimated separately from other fees? Should the Proposer assume a certain percentage of on-site work in estimating travel costs?

Yes, travel costs should be proposed separately from other fees. The County will work with the selected Consultant to determine what, if any, tasks will be performed on-site.

46. Does the County have a desired timeline to begin the implementation and/or complete implementation of the new ERP system?

No, however the County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP. Consequently, the County would expect project milestones (RFP release, vendor selection, contract negotiations, system implementation, system go-live, etc.) to occur on a timeframe consistent with a project of this scope as defined in this RFP.

47. RFP Section 4.3.1.2 references "meeting professional independence standards, as described under Governmental Auditing Standards." Although we are in independent IT research and advisory firm, was not an accounting/auditing firm. Are there specific elements of independence under GAS that the county could highlight as to meeting your procedural expectations? Would the county consider deleting the reference to Governmental Auditing Standards?

Yes.

48. Procurement Assistance, 1.3.2 - Will the County please provide information on the expected number of functional business people that will be participating in the RFP process and percentage of time they will be available to work on the RFP?

The County estimates there are approximately 20 functional representatives that will participate in the RFP process and the percentage of availability will vary by requirement. This is a high priority initiative so the County will provide the necessary staff resources as needed.

49. Procurement Assistance, 1.3.2.1 - Will the County provide examples of their existing ERP documentation and workflows?  
The County will provide available ERP documentation and workflows to the selected Consultant after the selection/contract process.
50. County Overview, 1.2 - How much historical data does the County plan to convert to the new solutions? Has the level of data cleanup activities been documented?  
All historical Human Resources, Financial and Budget data is currently planned for conversion. The County has limited documentation related to required data cleanup activities which will be provided to the selected Consultant after the selection/contract process.
51. Scope of Services, 1.3.1.1 – The Scope of Services references preparing a cost model for a seven-year period. What is the period of performance or contract term for this opportunity, i.e. date of award?  
The County wishes to engage a consultant as soon as possible to begin development of a new ERP system RFP.
52. Scope of Services, 1.3.1.1 – What is the County’s current protocol and what are the expectations, if any, do you have for the team to work onsite?  
Currently, masks are required indoors for ALL Wake County facilities for employees, the public and visitors including vendors. As detailed in the RFP, the County will work with the selected Consultant to determine what, if any, tasks will be performed on-site.
53. Scope of Services, 1.3.1.1 – Does the County plan to provide, or do they expect the awarded vendor to provide, cost model/work product templates?  
Yes.
54. Procurement Assistance, 1.3.2 & 1.3.2.5.2 – In addition to the County Project Management efforts, will the County supply resources for Organizational Change Management, Testing, Functional Leads and Technical Writers?  
Yes.
55. Deliverables, 1.3.3 – Some of the items in this section seem to be a joint effort between the Consultant and the Vendor. Please confirm that we are reading this correctly?  
It is expected the selected Consultant will generate the majority of the deliverables defined in section 1.3.3. The County will contribute staff resources and documentation as needed.
56. General Proposal Requirements, 1.4 - Does the County anticipate using the same format for the Vendor RFP as it does for this RFP?  
The County does not require this specific format for the ERP RFP document(s). However, typical language included in this RFP in the General Submittal Requirements and General Terms and Conditions sections will need to be included in the ERP RFP. Also, any RFP document(s) produced will need typical County review by departments such as IT, Legal, Procurement, and associated Business units.