Gainesville.
Citizen centered
People empowered

ADDENDUM NO. 3

Date: June 11, 2018

Bid Date: ~~June 26, 2018~~
June 29, 2018
at 3:00 P.M. (Local Time)

Bid Name: ERP Product Solution(s) and Implementation Services

Bid No.: CMGR-180083-MS

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

Please find attached:
a) Copy of the black-out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during pre-bid meeting.

The following are answers/clarifications to questions received since the pre-bid meeting:

General

1. Question: What is your targeted start date?

   Answer: If the questions is referring to the start of implementation, please refer to Addendum 1.

2. Question: What is your targeted Go Live date?

   Answer: The "go-live" date depends on the proposers approach; however, the City intends to have the "go-live" during the first quarter of calendar year 2019.

3. Question: What is driving the dates above – fiscal year, contracts, etc?

   Answer: The dates above are contingent on numerous factors (i.e., City Commission, City's need, technology upgrade, fiscal year closing, etc.)

4. Question: How many employees are in scope? How many contingent workers are in scope?

   Answer: Please refer to Addendum 1 and Exhibit 3, Data Volume in the ITN for estimate number of employees/workers

5. Question: Please describe the Project Team resources that will be allocated by the City, and their estimated FTE allocation to the deployment project.

   Answer: Please refer to Addendum 1 for current Project Team structure. Resource estimation will be conducted per the proposals.

HCM

6. Question: How many unions does the City have? How many bargaining agreements?

   Answer: Please refer to Exhibit 3, Data Volume

7. Question: Do any city employees have multiple jobs requiring different pay rates?

   Answer: Yes

8. Question: How does the City pay contingent workers if applicable?

   Answer: The City currently pays contingent workers through Purchase Orders; however, the City is continuing to explore options for improvements with this Project

Recruiting

9. Question: How many Job Posting Templates will you need?

   Answer: The City currently has 5+ job posting templates. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

10. Question: How many Offer Templates will you need? How many variations of each offer template do you have (where the text dynamically changes based on logic)?

    Answer: The City currently has 10+ offer templates. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

11. Question: Will you utilize questionnaires on the external job application?   If yes, how many questions per questionnaire? Do you have specific questions for specific jobs or functional areas?

    Answer: The City currently utilizes a questionnaire for external job applications. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

12. Question: How many Active estimated candidates are in your current ATS system today? Do you want to import all active candidates into Workday?

    Answer: The City estimated number of candidates in our current ATS system is ~10,000+. The City has not yet determined the ERP product but in general the City would like to have integration between the systems instead of duplication of data.

13. Question: How many unique recruiting business processes are in place today? For example, do you have different processes for hourly, executive, professional, intern or college hires? We are looking to see if your company has different recruiting process steps for some positions such as screening questions, background checks, drug testing, or other recruiting process steps that can be different by role or perhaps if they are standardized for all positions.

Answer: The City currently has different recruiting business processes in place; however, the City desires a standardized process for all positions. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Compensation

14. Question: How many compensation plans do you need (hourly, salary, allowance, one-time payments, etc.)?

    Answer: Please refer to Exhibit 3, Data Volume. The City currently has a breadth of different compensation plans (200+); including longevity, special and active assignments, car allowances, injury, etc.

15. Question: How many Ad-hoc payment types will be needed?

    Answer: Please refer to Exhibit 1, Functional Requirements

16. Question: How many Merit plans do you want configured?

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

17. Question: How many Bonus plans do you want configured?

    Answer: The City does not currently utilize any bonus plans

18. Question: How many Stock plans do you want configured?

    Answer: The City is not a publically traded company, so we do not utilize stock plans

19. Question: How many Grades (Pay Ranges) do you want configured?

    Answer: The City currently has 40+ pay grades; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

20. Question: Do you need any customized compensation statements? If so, how many?

    Answer: Yes, This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Benefits

21. Question: How many Benefit Plans will you need?

    Answer: The City currently has 5 benefit plans

22. Question: How many Benefit Providers will you have?

    Answer: The City currently has 8 benefit providers

23. Question: How many Benefit Groups are anticipated? (ex. administrative employees get a different benefit package than engineer employees)

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

24. Question: How many Enrollment Events will need to be configured (passive and life events)?

    Answer: The City currently has 6+ enrollment events; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

25. Question: How many Enrollment Rules will you need (ex. Spouse life can only be up to 50% of employee life)?

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

26. Question: Do you have any Grandfathered workers? If so, how many plans?

    Answer: Yes, the City currently has 4+ plans

27. Question: Do you have Benefit Credits such as Wellness? If so, how many?

    Answer: Yes, the City currently has 10+ credits

Payroll

28. Question: How many Earning Codes?

    Answer: Please refer to Exhibit 3, Data Volume Row #74

29. Question: How many Deduction Codes?

    Answer: Please refer to Exhibit 3, Data Volume Row #74

30. Question: How many FEINs?

    Answer: The City currently has 1 FEIN

31. Question: How many employees do you have with local taxes?

    Answer: Further clarification needed

32. Question: How often do your employees get paid (bi-weekly, monthly, etc.)? Are there populations that get different frequencies?

    Answer: Active City's employee get paid bi-weekly and retirees get paid monthly

33. Question: How many Pay Groups?

    Answer: The City has 2 pay groups (General Government and Gainesville Regional Utilities)

34. Question: How many employees have garnishments?

    Answer: The City has multiple employees with garnishments

35. Question: Are you outsourcing Taxes, Garnishments, check printing or any other part of your payroll process?

    Answer: No, the City currently process all payroll end-to-end

Time Tracking

36. Question: How many time entry codes (hours worked, meetings, etc.) do you want configured?

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

37. Question: How many calculations and validations do you want configured?

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

38. Question: How many time entry templates will you need?

    Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

39. Question: How many different work schedules do you have?

    Answer: The City has similar work schedules as other municipalities (i.e., fire, police, etc.)

40. Question: How many different periods for entering time do you have?

    Answer: Currently, time entry is decentralized; however, there is a centralized final due day for time entry completion. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

41. Question: Do your employees use web clocks, web entry, time clocks, all or other? If other, please explain.

    Answer: Yes. There are different sources for entering time

Absence

42. Question: How many accruing time off plans do you need configured?

Answer: The City has 2 accruing time off plans

43. Question: How many non-accruing time off plans do you need configured?

Answer: The City currently has 10+ non-accruing time off plans

44. Question: How many Leave Families or groups of leave types do you have?

Answer: The City currently has 4 leave families or groups

45. Question: How many Leave Types do you have?

Answer: The City currently has 32 leave types

Talent Management

46. Question: How many review types (PIP, performance review, disciplinary, development, etc.) will you want configured?

Answer: The City does not have a definite number of review types; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

47. Question: How many different performance review templates do you need?

Answer: The City is the process of generating templates; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

48. Question: Do you perform review calibrations?

Answer: The City is utilizing this project as a baseline to determine this process; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

49. Question: Do you store competencies on the employee or job level?

Answer: Please refer Exhibit 1, Functional Requirements

50. Question: Do you collect feedback on your employees? Annually for performance reviews or on an ongoing basis?

Answer: Yes, the City does collect feedback from employees on an annual basis. The City is utilizing this project as a baseline to determine this process; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

51. Question: If you plan to review talent, in addition to performance, do you have a need for differing templates? If so, how many?

    Answer: The City is utilizing this project as a baseline to determine this process; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

52. Question: Do you plan to utilize succession?

    Answer: Yes, This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Learning Management

53. Question: How many segmented topics or courses do you have?

    Answer: The City has 50 segmented topics or courses that are offered to our employees

54. Question: Do you have any courses that are part of a grouping where a learner must take them in a specific order? If so, how many groupings would you have?

    Answer: Yes, the City does have courses that are part of a grouping where a learner must take them in a specific order; however, there is no exact determination at this point on the total number of groupings.

55. Question: How many learning instructors will need to be loaded?

    Answer: The City would like to utilize the active directory to pull learning instructors

56. Question: How many course templates, course offerings and lessons will be needed?

    Answer: The City offers numerous training course offerings based on the organizational need

57. Question: How many records of historical learner completion records or data will you want loaded?

    Answer: Please refer to Exhibit 1, Functional Requirements

58. Question: How much content (GB) will you want loaded?

    Answer: This will be a design/data migration phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Financials

59. Question: Can the City please supply the following Financial volumes and information?

    a. The number of Ledger Accounts
    b. The number of Legal Entities and/or Business Units
    c. The number of departments (cost centers)

d. The number of divisions

e. The number of journals added per month

f. The number of vendors (suppliers)

g. The number of vendor (supplier) contracts

h. The number of purchase orders created per month

i. The number of vendor (supplier) invoices created per month

j. Do you have capital projects?

    i. If yes, please describe process the City follows to create a capital project.

    ii. Are there any asset integrations?

    iii. The total number of Projects and the average amount added per year

    iv. Are projects tracked at a granular level (Phases, tasks)?

k. The number of customers

l. The number of current and active customer contracts

m. The total number of current and active Grants

n. The volume of Grants established per year

o. The number of current and active funds

p. The number of current and active programs

q. The number of banks (financial institutions)

r. The number of bank accounts per financial institution

s. The number of business assets

t. How are business assets depreciated?

u. Does the City track assets by employee, location, etc.?

Answer: Please refer to Exhibit 3, Data Volume. This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

60. Question: Is the City using procurement cards? If so, please explain the process.

Answer: Yes, This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

61. Question: Is the City using Travel/Expense cards? If so, please explain the process.

Answer: No

62. Question: How does the City currently track their gifts/investments (if any)?

Answer: The City currently track gifts/investments through chart of accounts

63. Question: Do you have a centralized A/P structure?

Answer: Yes

64. Question: Do you have a centralized A/R structure?

Answer: Yes

65. Question: Do you have multiple systems of record for finance (I.e., sub systems and/or access databases/additional accounting entries that are not in your current PeopleSoft environment)? If so, how many and what types?

Answer: The City does not utilize PeopleSoft. Please refer to Exhibit 2, Department Diagrams.

66. Question: Which accounting dimensions does the City use to balance their financial reporting (i.e., Fund/Grant/etc.)?

Answer: Further clarification needed

67. Question: What types of reporting or analytics are you unable to generate today, using your current systems?

Answer: The City is in the process of streamlining its reporting capabilities; however, this will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

68. Question: Under current processes, how long does it take the City to close a period?

Answer: The City currently closes the monthly period in 15 days and the closes the quarterly period in 30 days

69. Question: Under current processes, how long does it take the City to close a year?

Answer: The City currently closes the year in 3 months

70. Question: What is the estimated volume of A/R and A/P carryover to the next year?

Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Data Conversion

71. Question: Please explain your data conversion strategy and if the City has a data warehouse in place today.

Answer: This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

72. Question: Do you plan to load transactional history for any areas? If so, how many years?

Answer: Please refer to Exhibit 1, Functional Requirements (Florida Sunshine Law)

Integrations

73. Question: Please identify the internal and external systems that the new system will need to integrate with. Common integration types include:

    i. Active Directory / Identify Management Systems
    ii. Internal or external systems for employee awards and recognition
    iii. Background check providers
    iv. E-Verify
    v. State and/or Federal reporting
    vi. Other internal and external systems that require HR/Demographic
    vii. Other internal and external systems that require Financial/Budget data
    viii. Banks and third-party payroll service providers

    Answer: The City would prefer to integrate with most internal and external systems to streamline City's processes and maintain the data integrity. The identification of all the system will be in the design phase. Please refer to Section 4.3.2 in the ITN

74. Question: Does the City wish to use Single Sign On (SSO)?

    Answer: Yes, This will be a design phase determination. The City expects the vendor to understand the City's current needs and challenges to recommend solutions aligning with the market best practices. The City will review and approve the vendor's recommendation which will lead to streamlining the City's current processes. Please refer to Section 1 of the ITN.

Organizational Change and Training

75. Question: How many internal resources will be dedicated to the Change Management Team tasks after product selection and during your implementation cycle and what is the anticipated FTE allocation percentage?

    Answer: The City's project team consists of 4 resources; however, the additional resource determination will be contingent on the proposed implementation plan

76. Question: Do you have an internal training team that would be leveraged for end-user training development and/or delivery?

    Answer: Not yet

77. Question: Have you conducted any Stakeholder or Readiness Assessments related to this initiative?

    Answer: Yes

78. Question: Have you used a Change Champion Network successfully in past initiatives?

    Answer: No

79. Question: Once the selection of the new ERP system has been made, do you have a strategy in place to evaluate staffing, change management, timeline, and other needs related to the implementation process itself?

    Answer: Yes

80. Question: How many internal, dedicated change management, communications and training resources will be provided for the Workday implementation?

Answer: The City has not selected the ERP product

81. Question: Briefly describe your organization's culture and estimated level of resistance to change/adoption of technology.

Answer: As mentioned in ITN, City has been on the current technical environment for the last 20 years. Exposure to the latest technology has been limited, however 80% of the stakeholder are looking forward to this change.

82. Question: Have you engaged end-users in a Change Champion network previously?

Answer: Yes

83. Question: Will development of training materials (job aids, Captivate simulation videos, PPTs, etc.) be created internally or by your partner?

Answer: Need further clarification

Other
84. Question: We would like to request a 2 week extension on the ITN proposal submission. This will allow us to better prepare the response for the City of Gainesville.
Answer: See addendum 2.

85. Question: Can the City please provide the current name of the Risk Management system that is used at the City? Name of system and Company that provided.
Answer: The City currently utilizes CGI Advantage and OHM (PureSafety and Underwriters Lab)

86. Question: We take our commitment to sustainability very seriously. We do always ask that prospective customers receive sales proposals from us in electronic form only in order to save paper. You have stipulated that you require printed copies of our response, which we will provide if it absolutely essential, but assuming that it is not we would propose to provide an electronic copy only. Please let me know if this is acceptable.
Answer: The City is taking steps to become more sustainably responsible, but at this time we do not have the resources to only accept electronic copies. Please provide the required 10 copies plus 1 electronic version.

87. Question: Do you withhold state tax for Retirees? We understand that Florida does not have a state income tax, but just wanted to check if you have Retirees is another state which requires withholding state tax.

Answer: The City does not withhold state tax for Retirees

88. Question: Section4.2 Technical Requirements - This section of the ITN states that responses should be limited to 5 bullet point of 25 words max each. Many of these questions cannot be answered in that brief format. Would the City consider removing the response limitation?
Answer: Please refer to Addendum 2

89. Question: Section 4.2.8 Implementation, Question 2 - Please clarify what this question is asking: "Provide an overview of the software components."

Answer: During the implementation of the ERP product, the City would like to know the overview of the all of the modules that will be implemented with any additional software that would be required for implementation

90. Question: Response Organization, Tab 10 - Please clarify which "forms" are

Purchasing Forms
Answer: Pages 17-39 of the bid document and Exhibit 9-Tabulation of Subs

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 3 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

<div align="center">CERTIFICATION BY PROPOSER</div>

The undersigned acknowledges receipt of this Addendum No. 3 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: _____

BY: _____

DATE: _____

CITY OF_____ FINANCIAL SERVICES
GAINESVILLE PROCEDURES MANUAL

41-424 **<u>Prohibition of lobbying in procurement matters</u>**

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.