



<input checked="" type="checkbox"/> AMENDMENT OF SOLICITATION
<input type="checkbox"/> MODIFICATION OF CONTRACT

City of New Braunfels
Purchasing
551 Landa Street
New Braunfels, Texas 78130

1. Solicitation No. RFP 22-002 - Consultant for Enterprise Resource Planning System	2. Contract No.	3a. Addendum No. 2	4. Effective Date of this Action November 1, 2021
		3b. Modification No.	

5. Name and Address of Offeror or Contractor	6. For Information Call: (No collect calls or Fax offers accepted) Purchasing: Barbara Coleman Phone No.: 830-221-4389 Fax No.: 830-608-2112	7. Amount of Contract/Order is: Increased by: Decreased by: New Total: <input type="checkbox"/> Unchanged
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8. THIS BLOCK APPLIES TO AMENDMENTS OF SOLICITATIONS ONLY:
The above numbered solicitation is amended as set forth in Block 10 below.
 The date and time specified for receipt of offers IS NOT extended.
 THE DATE AND TIME SPECIFIED FOR RECEIPT OF OFFERS IS CHANGED TO: November 16, 2021

Offerors must acknowledge receipt of this amendment prior to the date and time specified in the solicitation or as amended, by one of the following methods:
(i) By completing Blocks 5 and 11 and returning this Addendum in the number of copies specified for the solicitation;
(ii) By acknowledging receipt of this Addendum on each copy of the bid submitted; or,
(iii) By separate letter, telegram, or fax referencing the solicitation and addendum.
If by virtue of this Addendum offeror desires to change an offer already submitted, such change may be made by letter, telegram, or fax, provided each such notice makes reference to the solicitation AND this Addendum, and is received prior to the date and time specified.
NOTICE: NON-RECEIPT OF YOUR OFFER AND THIS ADDENDUM AT THE DESIGNATED PLACE WITHIN THE DATE AND TIME SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER.

9. THIS BLOCK APPLIES TO MODIFICATIONS TO CONTRACTS, DELIVERY OR PURCHASE ORDERS ONLY.
The above numbered Contract, Delivery, or Purchase order is modified as set forth in block 10 below.

<input type="checkbox"/>	This Change Order is issued in accordance with authority granted by instrument referenced in block 2.
<input type="checkbox"/>	The instrument in Block 2 is modified to reflect administrative changes.
<input type="checkbox"/>	This Supplemental Agreement is entered into pursuant to the Authority of:
<input type="checkbox"/>	Other (Specify type of modification and authority): _____.
<input checked="" type="checkbox"/>	CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN ONE ORIGINAL.
<input type="checkbox"/>	Contractor is not required to sign this document but is requested to acknowledge receipt.

10. This addendum is issued to provide answers to questions received during the question period. The question period ended October 22, 2021.

Note: Addendum 2 extened the proposal due date to: November 16, 2021.

Except as provided herein, all terms and conditions of the document referenced above remain unchanged and in full force and effect.

11a. SIGNATURE OF OFFEROR OR CONTRACTOR	CITY OF NEW BRAUNFELS, TEXAS	
	<i>"Barbara Coleman"</i>	
11b. PRINTED NAME AND TITLE	11c. DATE	1-Nov-21
Barbara Coleman		Date
Purchasing Manager		

CITY OF NEW BRAUNFELS



ADDENDUM 2

REQUEST FOR PROPOSALS

CONSULTANT FOR ENTERPRISE RESOURCE PLANNING SYSTEM

Solicitation # RFP 22-002

RESPONSES MUST BE RECEIVED **NO LATER THAN:**
3:00 P.M. CST November 1, 2021

New Braunfels Purchasing Department: Phone: 830-221-4389
Email: bcoleman@nbtexas.org

ADDENDUM 1 – Response to Questions
RFP 22-002 Consultant for Enterprise Resource Planning System
Issued: Oct. 22, 2021

1. In light of the potential updates on mapping the section title and section requirements, will the City of New Braunfels grant a 2-week extension on the proposal due date?

Answer: The bid date and time is extended to November 16, 2021.

2. If submitting via BidNet Direct, will an electronic signature suffice for this requirement?

Answer: Yes, the electronic signature in BidNet Direct is authorized.

3. Is the reference to Attachment A correct in 5.3.1.B 2? Complete the Reference Section in Attachment A. Provide at least three (3) references.

Answer: 5.3.1 B Experience is changed to reference Attachment B Company Information. The Company information is Attachment B Company Information and is included in TAB 6 Note that individual resumes shall include at least three (3) references from previous assignments.

4. On Pages 5 and 6 of the RFP, please validate that the references to Sections 5.3.1B, 5.3.1C, and 5.3.1D for Tabs 5, 6 and 7 correct.

- a. What portion of Section 5.3.1B should be described in TAB 5 Capacity to Provide Full Scope?
- b. What portion of Section 5.3.1C should be described in TAB 6 Qualifications, Experience, Expertise and Reputation?

Answer: Section 3.2 is referenced in its integrity on pages 8-10.

Changes to Section 3.2 are:

- **TAB 5 Capacity to Provide Full Scope** – (Refer to Section 5.3.1.B)
 - This section will support requested support under Section 5.3.1.B Capability and Assigned Personnel 1-3.
 - **TAB 6 Qualifications, Experience, Expertise and Reputation** – (Refer to Section 5.3.1 ~~C~~ B)
 - This section will support requested support under Section 5.3.1 B Experience 1-4 and Scope 1-7
 - Also, include the following attachments:
 - **ATTACHMENT B – COMPANY INFORMATION; and**
 - **ATTACHMENT C – RESPONDENT CERTIFICATIONS**
 - **TAB 7 Work Plan** - (Refer to Section 5.3.1. ~~D~~ C)
 - **TAB 8 Cost Proposal Form** – (Refer to Section 5.3.1 ~~E~~ D) Attachment A
5. The page numbering in the document indicates “Page x of 43”, but there seems to be only 39 pages. Are we missing parts of the RFP or does the page numbering just need to be corrected?

Answer: There are 40 pages including the title page.

6. Page 5 TAB 4 a. Certificate of Insurance
This paragraph refers to a "Section 3.10"; however, there is no Section 3.10 in the RFP. Please confirm that the requirement is to provide a sample Certificate of Insurance, and that there are no additional requirements that might have been detailed in another section of the RFP (other than the detailed insurance requirements in Section 6.10).
Answer: Insurance requirements should be corrected to reference Section 6.10
7. On the cost form – the implementation cost is primarily driven by the implementation duration. An engagement of this type typically runs from 9 months to 18 months for each phase, depending on the client's preferences and circumstances. To submit our bid, what is the assumed implementation duration for each phase?
Answer: The City is asking you to define the plan and approach which will be costed as your proposal. You will need to include your proposed timeline and cost associated to the timeline and other information you include in your proposal.
8. For the purpose of developing a cost proposal for the implementation phase, would the City provide an estimated duration at this time? For example, 18 months?
Answer: The staff here has not gone through a complete ERP installation. We would assume that full implementation of a system, once selected would take 12-18 months.
9. Does the existing deployed system, ONESolution, currently have a dedicated administrative team, including the vendor, that will participate in this project?
Answer: There is minimal administrative support with the City and minimal support from ONE Solution. There is not team.
10. Does the City's Information Technology Team have a formal Project Management Office to coordinate with project implementation tasks and activities through 2022 and beyond?
Answer: No, IT does not have a formal Project Management Office to coordinate the project implementation. There is minimal support from IT. It is the intent of the City to hire a Project Manager to assist in coordinating with project. The Consultant will be used to support the City Project Manager during the primary system implementation.
11. The RFP minimum qualifications section states that the Respondent must have completed a minimum of three successful implementations. Please clarify what types of implementation experience is acceptable to the City. Example experience classifications are listed below.
- Design
 - Configuration
 - Testing
 - Implementation Management on behalf of a software or services company
 - Independent Project Management for a public sector client
 - Quality Assurance for a public sector client
 - Independent Validation and Verification for a public sector client
- Answer: The City is looking for experience performing similar work and a minimum of three successful implementations in last five years. Implementation of ERP or Finance software systems where implementation included similar scope of work as referenced in Section 4.5. Implementation should include assessment and system review, RFP development and guidance in the selection process, and software implementation.**
12. The reference must be within the last 5 years. Since these types of projects can take multiple years to select and implement, will the City expand the time range to 10 years?
Yes. The City is willing to expand the time range to 10 years.

13. The RFP preferred qualification section lists both selection and implementation experience. Is the City looking for
- an independent advisor that can help guide the City to a software and implementation services selection as well as provide project management services on behalf of the City during the implementation or
 - an implementation services firm that can help the City select software and then manage the implementation of the selected software.
- Answer:** "A", The City is looking for 5-years' experience with similar work with 3 successful implementation projects and preferred experience in selecting/implementing ERP software in Cities of similar size. Including implementing multi-departments. See Section 4.5 Scope of Work will describe the similar work.
14. 5.3.1(B) Scope Questions 1 and 3 are very similar. Can the City describe what they are looking for in question 3 that is different from question 1?
- Answer:** In 5.3.1 B the city is looking the "what." This is the explanation of services you will provide with options the City might want to consider.
15. 5.3.1 (c) Project/Work Plan and Timeline - Question 3 states: *Include descriptive list of deliverables at each task step, and methodology for benchmarking performance.* Can the City please clarify what performance is being benchmarked?
- Answer:** In 5.3.2 the City is looking for the "how." How will your plan be implemented? How will you approach deliver of the services?
16. Page 24 Section 6.20 Conflict of Interest Questionnaire (Form CIQ)
It appears, based on the language in the RFP, that proposers should review the Texas Local Government Code and then make a determination regarding whether or not they believe they need to complete the Form CIQ. Please confirm that this is correct, and if not, please let me know and I will complete the form for inclusion in our proposal. SDI nor any of our project team have a business or personal relationship with any members of the City of New Braunfels.
- Answer:** The City is requesting that you complete the CIQ form for inclusion in your proposal.
17. Page 24 Section 6.21 Certificate of Interested Parties (Form 1295)
Based on the language in the RFP, it appears that the Form 1295 does not need to be included in the proposer's response but will be required prior to award of contract. Please confirm that this is correct, and if not, please let me know and I will complete the form for inclusion in our proposal.
- Answer:** The State does not require it until award, however, for ease of record keeping the City is asking that it be complete and included in your proposal.
18. Does the city have a projected budget for this project for 2022 and 2023 as it relates to Implementation schedules?
- Answer:** The City earmarked \$1.25 million of its reserves for replacement of our ERP system. While the city is hopeful this figure will support our total project costs, we plan to evaluate our needs and then finalize a funding strategy. Specific to staff augmentation and support, we will evaluate that costs similar to the costs of other consultants the city utilized on a regular basis
19. Does the City have a budget they can share for this project?
- Answer:** The City earmarked \$1.25 million of its reserves for replacement of our ERP

system. While the city is hopeful this figure will support our total project costs, we plan to evaluate our needs and then finalize a funding strategy. Specific to staff augmentation and support, we will evaluate that costs similar to the costs of other consultants the city utilized on a regular basis

20. What departments will be involved in requirements gathering?

Answer: Finance, Human Resources, Information technology

21. Is the city's current ONESolution system City or Vendor hosted?

Answer: OneSolution is City hosted.

22. Does the City only require project management services for the Implementation Phase?

Answer: Yes, it is expected that the software company will provide implementation support and the consultant will support the City in managing the implementation.

23. Does the City plan to hire a System Integrator for the Implementation Phase?

Answer: The City will not hire a System Integrator for the Implementation Phase

24. Does the City have a preference for cloud or on-premise for the future ERP system?

Answer: The City will rely on the Consultant to assist us in this decision but it most likely a cloud-based solution.

25. What are the required integrations with the new ERP system?

Answer: As referenced in Section 4.5 the City will require the consultant to perform an assessment and system review to assist the City in determining any system requirements including implementation and integrations.

26. Has the City determined the scope of ERP modules that will be implemented? Is it all of the systems described in section 4.5 of the RFP, including the ones not currently a part of the existing ERP?

Answer: The City has not determined software scope and is requesting such support from the consultant as referenced in Section 4.5.

27. What is the expectation for the ERP Consultants to work onsite during each phase of the project?

Answer: The Consultant will need to provide their approach for the City. The City does have an expectation that the consultant will be required to meet with staff, participate in interviews and other various tasks that will require a presence.

28. Does the CIQ Form need to be completed prior to submitting a proposal response to this RFP? If so, how should the form be completed if we do not have any conflicts of interest?

Answer: The CIQ form should be presented with your proposal. If there are no conflicts, please provide the company information in Box 1 and write NA in Box 3 and 4 and provide signature in Box 7.

29. Does Form 1295 need to be completed prior to submitting a proposal response to this RFP? If so, please advise what Agency/Entity Name should be entered on this form.

Answer: The 1295 may be submitted in advance or after an award from the selected vendor. If submitting with the proposal you will reference the City of New Braunfels as the Entity Name. The Contract ID is CSP 22-002.

30. Is the City planning to replace any of the other applications listed in section 4.3 of the RFP? If the City is not planning on replacing some or all systems, is the plan to create an interface between any of the systems and the new ERP?

Answer: Systems will not be replaced unless there is an option solution satisfactory to the City.

31. Can the City confirm that it wants both project management services and independent validation and verification services during the implementation?

Answer: The City can not confirm this need in services at this time. Once the qualified vendor is selected the City will discuss the scope of services in detail for contracting.

32. Has the City seen any demonstrations of other ERP systems?

Answer: The City has not seen demonstrations of other ERP systems.

33. Does the City wish to have the consultant facilitate and attend the software demonstrations?

Answer: Yes, the City will need the consultant to participate in the software demonstrations to understand the system. This will support implementation.

34. Does the City expect a deliverable (e.g., needs assessment report, issues and opportunities matrix) for Section 4.5 A 'Perform analysis of current system to identify functionality and process issues/concerns', or is this analysis only an activity informing the system requirements development? If a deliverable is required, does the City have a format they prefer (e.g., report, matrix, slide deck)

Answer: Yes, we would expect a report that summarizes the analysis and findings. We do not have a preference regarding format.

35. Does the City expect a deliverable (e.g., documented process flow improvements) for Section 4.5 A 'Evaluate process workflow for all City departments that have the potential to benefit from implementation of a new ERP software'? If a deliverable is required, does the City have a format they prefer (e.g., report, process flows)?

Answer: Yes, we would expect a deliverable and do not have a preference on format.

36. On Page 13, #5.3.1, B.3, the City requests, "The résumés shall include at least three individual references from previous assignments." Does this mean that the City wants proposers to make mention of three assignments per resume, or would the City like three references with contact information for each reference provided?

Answer: The City is requesting resumes of each professional or technical person to be assigned to the project. Their resumes shall include at least three individual references from previous assignments.

The City is requiring references of the company in Attachment B – Company Information, to be included in TAB 6, which asks for 3 references within the past ten (10) years, (modified in this addendum from 5 year to 10).

The requirements of in 5.3.1 B - Experience 2-3 is requesting expanded experience to be included in Tab 6.

37. How many end-users does the OneSolution ERP System serve?

Answer: Active Users: 205

38. What is the current volume of data? How many transactions per month are input into the current system?

Answer: Refer to Exhibit A – Broker Status

39. What functionalities are currently provided by the ONESolution system?

Answer: AP, Payroll, 1099's, W-2's, Journal Entries, Cash Receipts, Purchase Orders, Budgeting (GL & Project), COGNOS query/reporting, would like FMLA/Workers Comp tracking feature, a Fixed Asset module, FTE budgeting/tracking.

40. What is the volume of data currently run by the individual applications mentioned in the RFP and how many users have access to these applications?

Answer: This question will be discovered during the Assessment and System Review for the selected consultant's work.

I don't think we can provide the data currently run by individual applications but can we Id how many users we have?

41. How many General Ledgers accounts, profit centers, and cost centers does the City have?

Answer: This question will be discovered during the Assessment and System Review for the selected consultant's work.

The system currently has 1998 GL accounts (all types), 121 funds, 36 depts, 162 divisions, 939 projects (these are not all active, however, we don't delete them for historical purposes).

42. What other reporting tools are used by the City apart from Tableau?

Answer: The City is not familiar with Tableau. This question will be discovered during the Assessment and System Review for the selected consultant's work.

43. Does the city use OneSolution for Financial Management reporting? (e.g., P&L, Balance Sheet, etc.)

Answer: Yes, the City used OneSolution for Financial Management reporting, However, the current software does not meet the City needs. This question will be discovered during the Assessment and System Review for the selected consultant's work.

44. How many employees, vendors, and customers are currently in the system?

Answer: Active Vendors = 3803, All Vendors = 13,014, Employees = 4676.

REVISED Section 3.2 (pages 4-6 of Original Proposal)

Changes are in red

3.2 SUBMISSION OF PROPOSALS

- (a) Electronic Bidding. The City of New Braunfels has partnered with its third-party vendor, Texas Purchasing Group (BidNet Direct) as its e-procurement site. For this Request for Proposal, electronic bid submission is another option available to Proposers. The link to BidNet Direct website: <https://www.bidnetdirect.com/texas/city-of-new-braunfels>.

You must register on their site prior to your electronic submission. If you have any problems completing your vendor registration or submitting your electronic bid, please contact BidNet at (800) 835-4603, Option 2, to speak with live customer support.

If submitting an electronic bid through BidNet, an original hardcopy and USB will not be required.

- (b) Deliver your Proposal, or changes to your Proposal, in SEALED ENVELOPES OR PACKAGES identified on outside as a Request for Proposal to Owner, with Respondent's name and address, and solicitation name. Failure to submit Proposal in this manner may subject Respondent to disqualification. **Proposal may be delivered in person to the New Braunfels City Hall, or by Express Mail or delivery service to:**

**City of New Braunfels
City Secretary's Office/Front Lobby
ATTN: Purchasing
550 Landa Street
New Braunfels, TX 78130**

The outside of the Proposal envelope or package **must state**:

**"RFP 22-002 Consultant for Enterprise Resource Planning System
Proposal Due Date: November 1, 2021, 3:00 P.M. CT"**

It is the sole responsibility of the respondent to ensure timely delivery of the Proposal. Owner will not be responsible for failure of service on the part of the U.S. Post Office, courier services, or any other form of delivery service chosen by the respondent. **PROPOSALS RECEIVED AFTER THE CLOSING DATE AND TIME WILL NOT BE ACCEPTED OR CONSIDERED.**

- (c) An authorized official of the firm must print or type their name and **MANUALLY SIGN THE ORIGINAL PROPOSAL, AND USB COPY MUST REFLECT THE SAME SIGNATURE.**
- (d) Proposals may not be withdrawn after the time set for the closing, unless approved by the City.
- (e) Your offer or a modification to your offer is LATE if received after the time set for Proposal opening and will not be considered.
- (f) If you need clarification or have any question as to the true meaning of specifications or any other document in the solicitation, your concerns must be submitted in writing to the City's Purchasing Representative, via email only, on or before seven (7) calendar days prior to scheduled opening of Proposals. Late requests will not be honored. Timely requests will be interpreted or otherwise clarified by issuance of an addendum to the solicitation distributed to all sources that received a set of the solicitation. No other interpretations or clarifications will be provided prior to award.

- (g) The following items request information that the Evaluation Committee will utilize to evaluate the Proposal. Failure to provide any of the information below may result in a Proposal being deemed non-responsive and therefore not considered in the selection process.

A consultant wishing to be considered for a contract is requested to submit on the consultant/firm's letterhead, a statement which provides information on the following points, numbered and headed as indicated. The statements that follow request information that the Evaluation Committee will use to evaluate the RFP. Should you opt not to follow the suggested outline, it may result in the Proposal being considered non-responsive and therefore not considered in the selection process.

To achieve a uniform review process and to obtain a maximum degree of comparability, the City of New Braunfels requires that Proposals be submitted with **one (1) original master (marked 'original'), and one signed USB electronic copy of all documents listed below.** If submitting an electronic bid through BidNet, an original hardcopy and USB will not be required.

Each Proposal completed and signed by person(s) authorized to bind individual, partnership, firm, corporation, or any other legal entity, will include the following in one envelope/package:

- **TAB 1 Solicitation and Offer Form:** Complete and sign form located on Page 1.
- **TAB 2 Acknowledgment of any Addendum issued on this solicitation,** if applicable.
- **TAB 3 Cover Letter** - Name and address of the Respondent, as well as a brief description of the company and its history, and how this makes the Proposer qualified for this bid.
- **TAB 4 should contain the following documents:**
 - a. **Certificate of Insurance** One copy completed and signed (Refer to Section 3.10). **A "for information purposes only" copy is acceptable.** The awarded Contractor will be required to provide their certificate of insurance prior to contract award.
 - b. **Conflict of Interest Questionnaire** (per Section 6.20) Must be filed with the City Secretary **IF** the vendor has a business relationship as defined by Section 176.001(1-a) with the City and the vendor meets requirements under Section 176.006(a).
 - c. **Certificate of Interested Parties - Form 1295** (Refer to Section 6.21) This form will be requested from the awarded Contractor(s).
- **TAB 5 Capacity to Provide Full Scope** – (Refer to Section 5.3.1.B)
 - **This section will support requested support under Section 5.3.1.B Capability and Assigned Personnel 1-3.**
- **TAB 6 Qualifications, Experience, Expertise and Reputation** - (Refer to Section 5.3.1.B)
 - **This section will support requested support under Section 5.3.1 B Experience 1-4 and Scope 1-7**
 - **Also,** Include the following attachments Include the following attachments:
 - **ATTACHMENT B – COMPANY INFORMATION; and**
 - **ATTACHMENT C – RESPONDENT CERTIFICATIONS**
- **TAB 7 Work Plan** - (Refer to Section 5.3.1.C)

- **TAB 8 Cost Proposal Form** – (Refer to Section 5.3.1.D) Attachment A

NOTE: Failure to submit Attachments A and B & C will deem your proposal non-responsive.

- **TAB 9 Additional Supporting Documentation** Attach copies of contractor's license, certifications, or any other documentation not referenced under another tab.
- **TAB 10 Deviations from Request for Proposal** – (Reference Attachment E-EXCEPTIONS AND ALTERNATIVES FORM)
 - Proposer is to indicate any deviations being offered in lieu of specified language referenced in the solicitation.

ATTACHMENT E

EXCEPTIONS AND ALTERNATIVES FORM

Failure to complete this form may result in your Proposal being deemed non-responsive and rejected without any further evaluation.

Proposers are to comply with all requirements of this solicitation, otherwise the proposal may be deemed non-responsive. Exceptions may be considered if they are presented with the proposal and if the City determines that the exception does not materially alter the intent of this solicitation or that it exceeds the requirements of this solicitation.

- No Exceptions Taken
- Exceptions Taken – *See attached (Include in Tab 10)
**Note that if any exceptions are taken, all required information must be submitted as an attachment*

In the event the Proposer takes exception to any language in this solicitation, they may set forth alternatives by presenting each exception separately by stating:

- a)** The specific item or clause for which an exception is requested (citing the page and item number).
- b)** The suggested change to the exception, inclusive of proposed new language if applicable.
- c)** An explanation as to how the proposed change would benefit the City and/or why the exception is necessary.

Except as may be indicated above, Proposer is in complete agreement with this entire solicitation including any proposed terms, conditions and business arrangements described herein.

(Authorized Signature)

Date

(Title)