

ADDENDUM #2
CITY OF HAINES CITY, FLORIDA
RFP 24-03-1
Enterprise Resource Planning (ERP) Software and Implementation

Issued: May 24, 2024

Additions or edits are shown in **boldfaced** and underlined; deletions are ~~crossed-out~~.

1. **Attachment 6 Features**: Updated the Features table to clarify which system features and functions the City defined as Desired, Nice to Have, Potentially, Required, and Unwanted (Features Tab—Column D).
2. **Attachment 5 ERP Pricing Matrix**: Updated Core 3 Functions table (Tab 3) to include Finance, Human Resources, Development Services, and Technology & Security; changed the name from “Core 3 Functions” to “Core Functions.”
3. **Section 5.F.10 Exceptions and Deviations**: Updated this section to require proposers to submit exceptions and deviations to the contract in a separate form, **Attachment L Exceptions and Deviations**.

Original: Exceptions and Deviations If the Proposer finds it impossible or impractical to adhere to any portion of these specifications and all attachments, it shall be so stated in its proposal, with all deviations grouped together in a separate section entitled, “~~exceptions/deviations from proposal requirements.~~” This section will be all-inclusive and will contain a definition statement of every objection or deviation with adherence to specific RFP sections. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Proposer in submitting a proposal, will accept this stipulation without recourse.

Updated: Exceptions and Deviations If the Proposer finds it impossible or impractical to adhere to any portion of these specifications and all attachments, it shall be so stated in its proposal, with all deviations grouped together in **a separate form, Attachment L Exceptions and Deviations**. This form will be all-inclusive and will contain a definition statement of every objection or deviation with adherence to specific RFP sections. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Proposer in submitting a proposal, will accept this stipulation without recourse.

4. **Section 5.F.13 Attachments and Required Documentation**: Updated the list of executed attachments to include **Attachment L Exceptions and Deviations**.

Original: Proposal shall include executed Attachments A-H & J-K

- A Attachment Checklist
- B Addendum Acknowledgement
- C Insurance Requirements

- D Acceptance of Proposal Terms and Conditions
- E Drug-Free Workplace Certification
- F Conflict of Interest Statement
- G Public Entity Crimes
- H Local Preference
- J Federal E-Verify Compliance Certification

- K List of Proposed Sub-Contractors/ Suppliers

Updated: Proposal shall include executed Attachments A-H & J-L

- A Attachment Checklist
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- K List of Proposed Sub-Contractors/ Suppliers
- L Exceptions and Deviations**

5. **Attachment L has been released and posted to DemandStar.**

6. **A formal response to questions submitted by proposers has been released and is included in this addendum.**

City of Haines City
620 East Main Street
Haines City, Florida 33844

Q&A

**RFP 24-03-01 Enterprise Resource Planning (ERP) System and
Implementation**

1. Please advise on exceptions accepted for Scope of Services; 1.1 Local Training and Development Center.

Answer: Please clearly identify any exceptions or deviations to the solicitation requirements in Attachment L Exceptions and Deviations.

2. Your existing solutions spreadsheet does not indicate what system you are using to manage business licensing or local business tax receipts. Could you confirm what system you are using?

Answer: Business Tax Receipts are processed through iWorQ.

3. How many W-2s did you issue in 2023?

Answer: The City issued 388 W-2s in 2023.

4. How many active utility billing accounts do you have?

Answer: 19,579 and increasing by approximately 100 new utility accounts a month due to new construction and development projects.

5. How many users are there for the iWorQ system for permitting, planning, and inspections?

Answer:

Module	System	Full Access	Read-Only Access
HR	ADG	4	5
Finance	ADG	8	0
Development Services	iWorQ	35	5
Utility Billing	ADG	8	5
IT	ADG	3	2
Total	2	58	17

6. Including full time, part time, and seasonal staff, how many employees need to be tracked for timekeeping and/or PTO tracking purposes? (please consider your busiest month of the year when answering)

Answer: 360.

7. How many supervisors, managers, administrators will need access to the timekeeping system to make approvals, edits to the timesheet, or run reports, or approve/decline requests for time off?

Answer: There are 63 supervisors, managers, and administrators, and 66 employee groups.

When developing the proposal, please consider the following assumptions:

- **Within the current timekeeping system, there are three user types: Approvers, Leave Request Approvers, and Reviewers.**
 - **Approvers can review and make edits to timecards**
 - **Leave Request Approvers can review and approve leave requests**
 - **Reviewers can review timesheets but not make edits to timecards**

8. How many time clocks should we include in our proposal?

Answer: The City is requesting two (2) time clocks for Department of Parks & Recreation and the Haines City Library.

9. Is it desired for the time clocks to be Biometric Finger, Biometric Facial Recognition, or HID proximity (Card Swipe)?

Answer: HID proximity (Card Swipe)

10. If proximity is preferred will the new Vendor provide the HID cards? or will we be asked to work with the City's existing HID cards?

Answer: The City prefers the vendor to work with the City's existing HID cards.

11. Which departments will use Advanced Scheduling functionality?

Answer: The Fire Department.

12. How many employees need to be licensed for Advanced scheduling? (Advanced scheduling is defined as employees who need to do Shift swaps, vacation bidding, or having scheduling rules in the system which automatically assign the correct employees to open shifts)

Answer: 40 employees

13. Is FMLA Case Management required? Defined as the new time & attendance system automating the process of requesting FMLA leave, allowing employees to fill out required forms directly in the new Time & Attendance system, and tracking the open case, automatically alerting employees/managers when an employee is due back or running out of FMLA time?

Answer: Yes.

14. Is it desired for employees to punch in/out from a computer or smart phone?

Answer: The city is open to both options and would like to see more information regarding these features in the proposals.

15. Will any employees be allowed to either fill out their timesheets online, or have their timesheets auto populate based on their schedules? (these groups of employees would not punch in/out)

Answer: Yes, all timesheet should auto-populate and employees should be able to complete timesheets online. Employees that do not clock in/out should have their timesheets auto-populate based on a predetermined schedule.

16. Is it desired for employees to request time off electronically at a computer or smart phone?

Answer: Yes, all employees should be able to request time off from a computer or smartphone.

17. Do employees need to be able to view timesheets, view schedules, or request time off from the time clock? or will the ability to do these functions at a computer /smartphone suffice?

Answer: The ability to view timesheets, schedules and request time from a computer/smartphone will suffice.

18. Can you tell me if the following section will be enforced?

1.1 Local Training and Development Center

The selected Proposer shall establish and maintain a local training and development center, preferably a headquarters within the legal boundaries of the City, within ninety (90) days of award. This will remain in effect during the pendency of the ERP Agreement and Software Support Service Agreement to ensure the efficient and effective design, support and service of the ERP System.

Answer: Please reference the City's response to Question 1.

19. Is the City interested in a best of breed solution, i.e., can I submit a response for only the Community development portion of the RFP?

Answer: Yes, a firm may propose a best-of-breed solution if the firm submits as a joint venture or partnership with another firm to supply the HR and Finance modules.

20. Can you please provide the number of full and read only users for each system requested?

Answer: Please reference the City's response to Question 5

21. Would the City be open to moving away from Adobe for plan review?

Answer: Yes, the City is open to moving away from Adobe for plan review.

22. Please confirm all functional groups that would be looking to utilize the work order/asset management system (Ex: Streets, Stormwater, Sanitation, Fleet, Water, Parks, etc.)

Answer: Utilities, Public Works, Information Technology, Facilities Maintenance

23. Please confirm how many users would need access to the work order/asset management system.

Answer: 55. Core Functions – 35; Non-Core Functions - 20

24. Please confirm how many users would need access to the Community Development system – building, permitting, code enforcement, planning, etc.

Answer: Please see the City's response to Question 5.

25. Please confirm the number of parcels in Haines City.

Answer: The City currently has 19,556 parcels and anticipates an increase of 8,256 parcels slated for approval over the next 10 years plus annexations.

26. Can you please provide the estimated number of timeclocks needed?

Answer: Please reference the City's response to Question 8.

27. What is your reason for going out to bid?

Answer: The City seeks to purchase and implement a centralized Enterprise Resource Planning (ERP) system to create efficiencies and improve the effectiveness of the internal service departments that provide support to all City departments in its daily operations. This project will allow the integration, consolidation, and automation of business processes currently handled in separate systems as well as the elimination of duplicative, manual, and offline processes.

28. Has there been a budget determined?

Answer: No.

29. Will there be biennial budgeting? If so, how will it be split.

Answer: No.

30. Have there been any demonstrations performed by vendors prior to the RFP? If so, by which vendors?

Answer: Yes. Demonstrations were performed by Central Square, Tyler Technologies, OpenGov, Oracle NetSuite®, Edmunds GovTech, and SBL USA.

31. Are all Functional Areas listed required to qualify as a vendor?

Answer: To qualify as a vendor, proposers must submit for all Core Functions: HR, Finance, Development Services, and Technology & Security. Please reference Attachment 5_ERP Pricing Matrix (Tab 3) to review the priority for each function listed.

32. If all Functional Areas are not available for a vendor, will the vendor be disqualified or affect scoring?

Answer: Please reference the City's response to Question 31.

33. "Ability to enter in water purchases to track water intake against water consumption (i.e. to detect leaks, water theft, etc.). "

Can you clarify or provide more specific information on what you are asking for in this requirement?"

Answer: This feature was removed from Attachment 6 Features.

34. "Ability to record loans/advances for accounts with user-defined payment plans.
Can you clarify what you mean by loans/advances?"

Answer: This feature references the system's ability to determine if a utility account is eligible for a payment plan based on the qualifications.

35. Section B. Scope of Services

1.1 Local Training and Development Center

The selected Proposer shall establish and maintain a local training and development center, preferably a headquarters within the legal boundaries of the City, within ninety (90) days of award. This will remain in effect during the pendency of the ERP Agreement and Software Support Service Agreement to ensure the efficient and effective design, support and service of the ERP System.

- a. Does this imply the City intends to have on-site resources during implementation only and not through production use? Once solution is go-live will the City accept our remote customer support services (located within North America)?

Answer: No, the on-site resources during implementation are to remain in effect during the pendency of the ERP Agreement and Software Support Service Agreement. However, please identify any exceptions or deviations to this requirement in Attachment L Exceptions and Deviations.

- b. Would the City consider alternatives such as dedicated resources available remotely (wouldn't be tasked to other client work) or a hybrid approach that would include both remote and local resources and/or scheduled visits.

Answer: Please see the City's response to Question 1.