

**Town of Winterville, NC
ADDENDUM #1**

RFP 2019-1, 2 and 3

Issue Date: August 23, 2019



Issued By:

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Questions and Answers

The following questions have been posed to the Town of Winterville regarding its Request for Proposals (RFP) for an Enterprise Resource Planning software (with additional Utility Billing and Community Development modules/functionality) and implementation services.

Like questions have been merged together. Responses are provided in [blue](#).

Question 1. Please clarify statement on page 4 “UB software that will allow the Town to accept and evaluate the entire building and infrastructure permitting process electronically”.

The town ideally would like a process where customers submit all required information and attachments necessary for Town review electronically. Then, it would like to distribute to appropriate Town staff for review through electronic workflow. The Town would like to review and mark up documents electronically. The customer should have access to a self-service portal to view application status. Document edits are provided back to customers electronically, then re-submitted electronically as necessary. The permit is then issued electronically. All documents are stored electronically.

Question 2. Please clarify the intention for a target go-live date of July 2020. Is the primary driver because Town staff are also heavily involved in the annual audit process than generally takes place from August through November of each year? Is the Town flexible on this timeline?

While the Town would prefer core financials with a go-live date to coincide with the fiscal year, (July 1) it understands the stress to the project this target date poses. The Town timeline is flexible. Please provide your recommended timeline and the level of effort necessary to transition from the old system to the new under a “off-cycle” implementation. The Town will review all suggestions and discuss further should your firm be elevated to the next stage for consideration.

Question 4. We understand that The Town’s annual budget cycle begins in July and the budget is approved in the following June. With a target go-live date of July 2020, we assume budget had already been secured for this project. Can you please clarify what the budget is and how these expectations have been established?

The Town administration has been advised on the expected cost of ERP (and UB and CD) projects based on recently awarded contracts ranging from on premise installations as well as cloud-based. GFOA also worked with Town staff to review costs through the types of requirements provided in the Town’s RFPs compared to other projects of similar size and scope.

Question 5. Regarding C.11 Data Conversion, the Town is interested in understanding from Offerors on ideas and methods to convert exiting hardcopy files to digital for use both within the proposed system and outside. To clarify, are you looking for Offerors to convert paper documents into electronic documents, store them and have them be associated to respective accounts/customers/premises? Can you please speak to the size/volume of these paper files to be converted/stored? (for Utility Billing related files/documents)

The Town understands the gravity of this request and the potential impact on pricing. Please provide an understanding of how the Town would import existing hardcopy information into the proposed software regardless of whether it is accomplished by Town staff, the proposed vendor or a third party. Also, if you provide this service through the course of implementation, please provide per hour or per unit pricing. If you do not provide these services, please state so in your proposal. If you work with a third party (preferred or otherwise) please provide contact information, etc.

Question 6. Can Winterville confirm that the total number of customer accounts it serves today is 4273? Per the “number of active accounts” listed in section C.2, we are seeking confirmation that Electric accounts (3207) and Garbage accounts (3970) are also Water (4273) accounts. If the total number of individual accounts is greater than 4273, can Winterville please provide that number?

At last month’s billing the Town had a total of 4,621 customers. This is covered in two billing cycles. This is the TOTAL number of accounts. Services are not defined, and can be random based on geographic area and territory agreements. One customer may have water only; another may have electric, water, sewer, storm water, garbage; another may have water, sewer, and garbage.

Question 7. We note that Winterville is simultaneously running an RFP for an ERP solution (RFP 2019-1). As documented on page 9 of RFP 2019-1, a utility billing component that is integrated with or part of the ERP is “optional but desired”. Can Winterville please clarify how it will evaluate the merits of a standalone Utility Billing solution versus a Utility Billing “module” within an ERP?

Functionality will be reviewed in comparison to the Town requirements as listed in the RFP. Then, this functionality will be viewed in context as to how the module can be used in conjunction with other core modules to provide services to the Town’s customers.

Question 8. Do all of the criteria for a stand-alone Utility Billing system (RFP 2019-2) apply to the selection criteria for a “utility billing component” within RFP 2019-1?

Yes.

Question 9. Can Winterville please clearly state its expectations for an eventual integration of a standalone Utility Billing system with the ERP system? (both for timelines for an integration and desired integration points).

The Town expects that data will need to be moved to and from the Utility Billing module/system and other modules (e.g., GL) on a continuing basis upon go-live. The Town also expects vendors to propose how this can be accomplished given their experience on past projects and knowledge of their own system's capabilities.

Question 10. Per the discussion during the Aug 16 vendor conference, can Winterville please confirm that the broad language in section D.13 is not binding?

Correct. You may provide pricing for 5 years, not the "period of 10 years" as listed on page 32, Section D.13.

Question 11. Per UB Functional Requirement #170 in the Functional Requirements attachment, Winterville is seeking the capability for online bill payment. Does Winterville currently have the ability to receive payments online? If so, can Winterville identify the current vendor for that functionality/platform?

Sungard / Central Square provides the online bill pay portal currently.

Question 10. Can Winterville provide an approximate counts of the number of Service Orders it performs in a typical year? (Electric/Water) Can Winterville please clarify how many field staff are currently employed to performed those service orders?

4,079 service orders.

The number of field staff employed to perform service orders varies based on the type of work to be done. But to provide some context, below is table of FTEs as provided in the Town's current audited financials:

Town of Winterville, North Carolina
Full-Time Equivalent Town Government Employees By Function/Program
Last Ten Fiscal Years
Table 18

Function/Program	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Central government										
Administration	2	3	2	1	2	4	5	5	5	5
Finance	6	6	6	6	6	6	6	6	6	6
Town Clerk	1	1	0	1	1	1	1	1	1	1
Planning	4	4	3	2	3	1	1	1	1	1
Inspections	N/A	N/A	N/A	N/A	N/A	2	2	2	2	2
Transportation										
Streets and Highways	4	4.5	3.5	3.5	3.5	6	6	5	4	4
Public Safety										
Sworn Officers	19	20	19	18	18	19	19	19	19	19
Civilians	1.5	1	1.5	1.5	1	1	1	1	1	1
Fire	0	0	0	0	1	1	1	1	1	1
Public Works	4	4.5	3.5	3.5	3.5	3.5	4	4	4	3
Economic and physical development	0	0	0	0	0	0	0	1	1	1
Cultural and recreation	4	5	5	3	4	4	4	4	4	4
Operation Support / IT	3	3	2	2	2	1	1	0	0	0
Electric operations	13	11	10	8.5	9	10.5	9.5	9	9	10
Water	5	5	4	3	4	3	3	3	3	4
Sewer	3	3	3	3	2	2	2	2	2	2
Storm Water	0	0	0	0	0	0	0	0	1	1
Information Technology	1	2	2	2	2	2	2	0	0	0
TOTAL	70.5	73	64.5	58	62	67	67.5	64	64	65

Question 11. Will Winterville consider an extension to the bid submission deadline? At a minimum, can Winterville commit to a minimum of 15 working days from the time that all questions are answered to the time that submissions are due?

No.

Question 12. Can the Town provide more context to the general requirement to “Track deadline dates with effective dating capabilities”? Please explain effective dating capabilities.

Software company should provide how they manage deadline????

Question 13. What is the evaluation criteria based on or is there a matrix for how proposals will be scored based on criteria such as price, solution fit, experience, market reputation, etc.?

This was in the RFP with the Percentages

Question 14. How likely are you to choose a vendor that may be best in class but specializes in one specific component of the different programs you’re evaluating?

I feel that cost will play a role in this decision.

Question 15. Will there be more consideration for an all-inclusive solution?

No.

Question 16. Can the Town provide a use case/example to explain the general requirement to “Verify business license status for all contractors and to add business license application to permit and have fees directed appropriately”?

This would occur when business are applying for an inspection, or zoning compliance cert, to help enforce business operating in Town have a licenses.

Question 17. Will the Town elaborate on the fee requirement for “Changes to structure, ownership, location, etc.” Please explain the Town requirements for this line item. Also please provide more context to the fee requirement to “Record company account information”.

If any items in the functional requirements are unclear, please mark them as “ND” or otherwise needs discussion. Specific questions of this nature will be addressed with vendors that are elevated to the demonstrations phase.

Question 19. Does the Town currently utilize a document management system?

No.

Question 20. Please explain how you define the 10 power users versus the additional 20 other users you might want to give access to the new software for Community Development i.e. will the additional users outside of the 10 users defined as power users need to have access to the system regularly as part of their job responsibilities.

Power user will be using the software for most of their operations, will the none power user will need access to the software from time to time depending on job responsibilities.

Question 21. Is the town currently using a digital plan markup tool for plan review and if so what tool is being used?

No.

Question 22. How many different types of permits does the town issue?

Building, Fire, Tent - Each type can have 30+/- different permits. ie building – HVAC, Plumbing, Electrical. Fire – Commercial, industrial, flat fee, sq feet.

Question 23. What is the evaluation criteria based on or is there a matrix for how proposals will be scored based on criteria such as price, solution fit, experience, market reputation, etc.?

The following elements will be the primary considerations in evaluating written proposals (in no particular order):

1. Implementation Methodology and Approach
2. Ability to Meet System Requirements
3. Qualifications and Experience

4. Compatibility with Winterville's Terms and Conditions
5. Cost

The following elements will be the primary considerations in evaluating software demonstrations:

1. Functional and Technical Software Demonstrations
2. Implementation Interview (Methodology, Strategy, Business Process Improvement, and Plan)
3. Qualifications & Experience
4. Overall System Features (Workflow, ease of use, reporting, self-service, etc.)
5. Cost

The following elements will be the primary considerations in evaluating discovery:

1. Implementation Interview (Methodology, Strategy, Process Improvement, and Plan)
2. Project Team Experience / Knowledge
3. Cost (project and on-going)
4. Compliance with Terms & Conditions
5. Formal responses to Request for Clarification (RFC)
6. Software Functionality

Question 24. Are you planning to replace the current Superior system completely or add another software system that would work with the current system?

Replace or upgrade to a new version (only an option if current vendor proposes).

Question 26. Will there be more consideration for an all-inclusive solution?

There will be given equal consideration for an ERP coupled with standalone UB and CD products as there will be given to an "all-inclusive solution" provided by a single vendor. The decision will be based on the best fit for the Town.