



ALBUQUERQUE PUBLIC SCHOOLS

Albuquerque Public Schools

Addendum 2

RFP #23-084CG – Enterprise Resource Planning Software and Services

The schedule of events for this RFP has been hereby revised as follows:

RFP Issued	04/04/2023
READ ALL DOCUMENTS: Offerors must familiarize themselves with all documents contained herein; it is mandatory that all submitted offers be in compliance with all the provisions contained in the Request for Proposal. Offerors should promptly notify the Buyer of any ambiguity, inconsistency, error, or missing attachments which they may discover upon examination of the RFP.	
Pre-proposal vendor conference https://plantemoran.zoom.us/j/89760383508	04/18/2023 @ 10:00am (local time)
Deadline for Questions	04/25/2023 @ 5:00pm (local time)
RFP Due Date and Time	05/23/2023 @ 3:00pm (local time)
<i>Proposals must be received by the due date and time. No late proposals will be accepted. The only acceptable evidence to establish the time of receipt is the date/time stamp from electronic bidding system (Vendor Registry).</i>	
Evaluation of Proposals	May - August 2023
Finalist Offerors Demonstrations (Offerors are strongly encouraged to hold these dates in the event that they are selected as a finalist)	Weeks of July 31 and/or August 7, 2023
Contract Negotiations	TBD

The following Questions and Answers are hereby made part of the solicitation for the above referenced project and shall be taken into account in the preparation of proposals and execution of all work. Vendors shall acknowledge receipt of this addendum.

QUESTION	ANSWER
1. Appendix B, Human Resources, Number 3: Are you looking for a full performance evaluation system, or is this referring to storing evaluation history on the employee record?	Performance management is an optional module for this RFP. See optional pricing line items in Appendix A.
2. Are electronic signatures acceptable for the forms required for submission?	Yes
3. Can you detail the number of employees that clock in and clock out?	No, this an item that will be address with the awardee.

4. Do you use physical clocks? If so, how many?	Yes, the number of clocks will be verified with the awarded vendor.
5. How many employees should we quote, who will use the system to report their time, leave or both?	Approximately 11,000.
6. Is there a need to allow employees to use the time and attendance system for time off requests and the viewing of their leave balances?	Yes, these are desired features. Please reference Appendix B for full application software requirements.
7. What self service tools would be important to have available for employees from the physical time clocks, mobile apps, or WebClock?	Ability to punch in/out and enter time to a variety of cost centers/codes would be the most important features. Please see Appendix B for full Time & Attendance software requirements.
8. Are there any employees who work multiple positions and could possibly receive a blended or weighted overtime based on their different rates of pay?	Yes, there are employees who fit this description.
9. Would it be helpful to the District to track additional duties of other employees such as teachers who provide afterschool tutoring, or collect tickets at a sporting event? If so, are they included in your employee count?	Yes, these are desired features. Please reference Appendix B for full application software requirements.
10. Would it be helpful to the District to track time spent on grants for such areas as Title 1, etc.? If so, are these employees included in your employee count?	Yes, these are desired features. Please reference Appendix B for full application software requirements.
11. How does the district want employees to clock in/out? Via physical time clock that is wall mounted, via WebClock, or mobile app?	Vendors should assume that employees will clock in via browser or mobile application for purposes of the base bid. Physical time clocks devices may be quoted as an option on a per unit basis.
13. What type of time clock devices would be desired to quote? ID number, Bar Code Swipe, Magnetic Swipe, RFID/Proximity, or Biometric Finger?	This is unknown at this time. Multiple time clock options may be proposed as optional on a per-unit basis.
14. How many physical time clock devices are desired for the quote in the RFI?	This is unknown at this time. Time clocks should be proposed as an option on a per-unit basis.
15. Are there any other systems in the District's technology footprint that the time and attendance system should be able to communicate with such as substitute management system, etc.?	Additional interfaces are not required at this time for purposes of the base bid. Vendors should indicate hourly rates for add-on consulting services, which may include interface development services, using the space provided in the "Pricing Questionnaire" form of Appendix B.
16. For 9 and 10 month employees, are they on stretch or annualized pay? If so, are you just reporting the exception of their hours to the payroll system?	APS's 9/10-month employees are on stretch pay or reserve pay system (paid over a 12-month period). Some of these employees are exempt and report time on an exception-basis, and some are non-exempt and clock-in and out as hourly employees.

<p>17. Are there any instances where the District would use comp time instead of overtime? And vice versa? If so, is that an employee choice?</p>	<p>Comp time pay is used on a limited basis outside the payroll system.</p>
<p>18. Appendix A, Vendor Questionnaire, item 121. The requirement states: Please describe your ability to support required State of Washington financial/human resources reporting. Can you please clarify this requirement? Should it be State of New Mexico or is this an errant requirement?</p>	<p>This is a mistake. The item should read “Please describe your ability to support required State of New Mexico financial/human resources reporting.”</p>
<p>19. Can you confirm whether companies from Outside USA can apply for this? (like, from India or Canada)</p>	<p>Companies from outside the US may apply, however, there are some services, including hosting of the proposed solution and all system data, that must be performed within the US. Location of proposing companies and implementation/support resources may factor into APS’s evaluation. APS reserves the right to reject any proposal for any reason.</p>
<p>20. Can you confirm whether we need to come over there for meetings?</p>	<p>APS requires some activities, including power-user, administrator, and technical training, to be performed onsite. Other remote activities are acceptable. Overall onsite presence may factor into APS’s evaluation. APS reserves the right to reject any proposal for any reason.</p>
<p>21. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)</p>	<p>The RFP hosting requirements specify that all data must be hosted in the US at all times. With regards to implementation and support personnel resources, the RFP does not require that all resources be US-based, however, extensive usage of offshore staff may factor into APS’s evaluation. APS reserves the right to reject any proposal for any reason.</p>
<p>22. Can we submit the proposals via email?</p>	<p>No. Proposals will only be accepted via VendorRegistry. See page 1 of the RFP.</p>
<p>23. What roles and % of time commitment does APS anticipate it will be able to allocate for this Project?</p>	<p>This is unknown at this time. Per Section 20 on page 26 of the RFP, APS requests that the Vendor provide an overall staffing plan for the project, including identification of district resources that would be utilized during the course of the implementation in terms of hours or full-time equivalents (FTEs), both for APS’s IT services department staff as well as those within the various district process-owning and process-using departments.</p>

<p>24. Can APS please provide its definition of a "Power User"? Are there other "Users" within a specific Functional Area that APS has?</p>	<p>A power-user is defined as an APS staff member (typically a central business office user) who uses advanced features of the system not typically utilized by end-users. End-users would be defined as APS staff members who utilize the system infrequently for only a few relatively simple functions (i.e. submitting requisitions, entering time, etc.).</p>
<p>25. Has APS created any structure for organizational change management for this project? For example, is there a steering committee or structure to evaluate current practices with a view to changing them?</p>	<p>An OCM structure has not yet been formulated, but APS anticipates doing so prior to implementation. APS does have an ERP steering committee in place.</p>
<p>26. Please describe key findings from any operational assessments you have conducted to understand your technology requirements as well as how new technology may drive improvement in other aspects of your organization (e.g., process, staffing, decision-making).</p> <p>Clarifying: What other aspects of your operations (e.g., processes, staffing, decision-making) do you hope to improve by leveraging new technology?</p>	<p>See section 2 on page 19 of the RFP for goals and aspects of APS's operations that the district hopes to improve. APS also hopes to achieve increased business process efficiency and automation – see the business process workflows exhibit published with Addendum 1.</p>
<p>27. Can APS please describe your current operational environment. To what degree might current processes be considered best practices? Please describe any external operational benchmarking that may have been conducted.</p>	<p>See the business process workflow exhibit posted with Addendum 1.</p>
<p>28. What is APS's expectations and plans for engaging stakeholders in the leadership, decision-making, and work of this initiative?</p>	<p>APS intends to involve stakeholders in many aspects of this initiative. A wide group of stakeholders will be invited to system demonstrations and their feedback will be solicited. A cross-functional group of leaders has been identified to serve as the selection committee for this initiative.</p>
<p>29. Has APS identified a core team (e.g., sponsors, steering committee, project managers, project leads, subject matter experts, etc.)? If so, what capability will they bring to the project? What gaps in capability may exist?</p>	<p>APS has formulated an executive steering committee, PMO, functional teams, and a selection committee for this initiative.</p>
<p>30. For Context: Can APS please describe any experience key project leaders and subject matter experts may have with enterprise technology implementation? With process improvement and process re-engineering?</p>	<p>Various APS leaders have experienced ERP implementations and process improvement initiatives in the past. A process improvement initiative was performed at APS prior to the release of this RFP – see the business process workflows exhibit published with Addendum 1.</p>
<p>31. For Context: Can APS please describe the organizational experience with past change</p>	<p>Some APS leaders and stakeholders have experienced significant organizational</p>

<p>initiatives, including the type of project, success/struggles, lessons learned?</p>	<p>change initiatives in the past, and others have not. APS will be reliant on the selected vendor to provide significant OCM support throughout the implementation. See Section 9 on page 23 of the RFP for required change management services to be provided by proposers.</p>
<p>32. Does APS currently conduct employee training or is it outsourced?</p>	<p>APS conducts training in house.</p>
<p>33. Does APS have the infrastructure in place for training - standard course materials and approach and learning management system?</p>	<p>APS uses Canvas.</p>
<p>34. Is the goal of APS for the ERP implementation to standardize processes across the School District, or will these decisions be handled on an individual school/grade/department level?</p>	<p>APS intends to standardize processes.</p>
<p>35. How many employee benefit plans does APS administrate?</p>	<p>APS offers benefit plans, but we have vendor that administer our plans.</p>
<p>36. Within the current APS ERP Solution - Is there an established enterprise data warehouse? Please provide detail on database, tools used, etc. Is an Enterprise Data Warehouse required or desired to accommodate cross business process/cross application reporting and analysis throughout the APS Enterprise?</p>	<p>There is no enterprise data warehouse for the ERP Solution. APS plans to acquire a solution after the ERP vendor is selected.</p>
<p>37. What are the biggest challenges/pain points for APS, with the current ERP system?</p>	<p>These difficulties were described on the pre-bid conference call. They include, but are not limited to manual data processing, lack of workflow, lack of integration between the ERP and ancillary systems, insufficient reporting capabilities, and lack of user-friendliness.</p>
<p>38. What are the 3-5 biggest or most important attributes for APS which would define "Success" for this ERP Project Initiative</p>	<p>See section 2 on page 19 of the RFP.</p>
<p>39. What system does APS currently use to track Employee grievances and claims? Is this functionality desired/required in the new ERP?</p>	<p>APS does not use any dedicated grievance tracking software. It is not part of the scope of the project.</p>
<p>40. When is APS's Employee Benefits Open Enrollment Period Annually?</p>	<p>The first two weeks of October.</p>
<p>41. What is the total of APS PO-based spend today?</p>	<p>Approximately \$300,000,000.00-\$400,000,000.00 annually</p>
<p>42. What is the total of APS non-PO based invoice spend (including pcard purchases)?</p>	<p>p-card approximately \$2,000,000.00.</p>
<p>43. What solution does APS currently use for budget preparation?</p>	<p>Infor Lawson and Excel spreadsheets.</p>
<p>44. How many users does APS currently have in their budget preparation system? Does APS anticipate any change to the number of users?</p>	<p>8 users centrally and 144 at school sites & 40 in departments.</p>

	No change is anticipated in number of users.
45. Has APS had presentations or demonstrations over the past 1-2 years on potential new ERP Solutions? If Yes - can APS provide which potential new ERP Solutions were presented/demonstrated?	No.
46. Please provide details about the current APS data retention policy. Is there currently a purge process in place? If so, please provide the retention period and if the same retention policy is expected after the new implementation.	APS has not purged any data in its current ERP Solution over the life of the product. The district has expressed retention goals for each module in the RFP.
47. How many users are authorized to issue contracts for APS?	Only APS procurement officers issue contracts for APS, approximately 11 FTE.
48. How many users are authorized to issue RFPs for APS?	Only APS procurement officers issue contracts for APS, approximately 11 FTE.
49. Do users in Schools and Administrative areas request new contracts for use by their school or department?	Yes.
50. Does APS have a preferred Go Live date for the new ERP? For instance, do you have a preference for the beginning of fiscal year? Or is APS okay with a mid-year go live?	Implementation timing is flexible and vendors should propose whatever they believe to be best practice for APS.
51. Is it acceptable (or desired/required) to APS for an Implementation Plan/Model where the CORE Project Team is US Personnel on US Soil - augmented(where required) by Off-Shore Support resources?	See the response to question 19 above.
52. Can the District provide the expected Project and Governance Structure – (i.e. – Hierarchical Structure, Key Roles and Participation Levels, Projected Core Team structure)?	See the response to question 29 above.
53. In order to clarify the ideal vendor for APS, please describe the 'best fit' vendor characteristics desired by APS as applied to the 'Vendor Fit' evaluation criteria.	Additional details regarding evaluation criteria will not be released at this time.
54. The 'Budgeting' requirements include item 28 'System must have activity-based accounting capabilities/modules'. To assure an accurate response to APS requirements, please clarify the desired objective(s) and specific activity-based accounting functions desired within the budgeting application functionality.	In order to account for different funding and specific programs, the system should be able to differentiate different funds and different programs to the funds
55. Please expand on the benefits offered to ATRP participants continued benefits eligibility.	ATRP participants are not offered benefits. Only a current benefit-eligible employee that has been accepted into ATRP is able to maintain their benefits-eligibility through the duration of their participation ATRP. As such, they are able to participate in offered

	benefits as all benefits eligible employees do.
56. Please expand on the State of New Mexico benefits plans with which integrations are requested related to benefits. What benefits are provided via APS vs. the State of New Mexico benefit plans? What populations are eligible for each?	The NMERB (New Mexico Educational Retirement Board) and RHP (Retiree Health Plan) contributions are State-mandated contribution percentages for employees and employers, based on employees' salaries. There are no other State of New Mexico benefit plans offered to APS employees. APS offers medical/Rx, dental, vision, flexible spending healthcare and dependent care accounts, voluntary life and LTD and voluntary retirement savings plans; all full-time employees are eligible for these benefits offerings. Part-time employees who were full-time, benefits-eligible for at least 1 full contract/calendar year, immediately prior to dropping to a part-time status of minimally 45% full-time equivalency, continue to be benefits-eligible. Sick Leave Bank is an employee group benefit offering; only certain employee groups are eligible. COBRA has standard federal eligibility requirements that APS adheres to.
57. Please provide an example of APS' expectations related to partial arrearages.	This will be discussed with the awarded vendor.
58. Please provide a copy of the Benefit Guide(s) and/or SPDs describing the benefits offered to employees.	This is outside the scope of this RFP. APS offers benefit plans, but we have vendors that perform the administration of the plan.
59. Are retirees offered any benefits through APS outside of the Life Insurance described in the Benefits tab of the RFP? If yes, please describe including any variations between populations, Pre/Post-65, etc. Can APS please provide the following information?	Retiree Life Insurance is the only benefit offering available to employees' post-retirement. COBRA is a federal requirement.
1.Total number of eligible employees:	10,665
2.Total number of Medically Enrolled Employees:	7,102
3. Total Number of Ineligible employees:	2,126
4. Average number of employees on COBRA per Month:	51
5. Total number of 1095 Statements sent last year:	12,580 sent out for 2022
6. Total number of Retirees under 65:	Retiree life is the only offering to retirees; only retiring employees who currently have additional life insurance through APS are eligible to enroll in Retiree Life Insurance.
a. Eligible to enroll:	Number of retirements varies each month NA – not offered to retirees. Approximately 385

<p>b. Enrolled in Medical: c. Enrolled in Life only: 7. Total number of Retirees over 65:</p> <p>a. Eligible to enroll: b. Enrolled in Medical: c. Enrolled in Life only:</p>	<p>Retiree life is the only offering to retirees: only retiring employees who currently have additional life insurance through APS are eligible to enroll in Retiree Life Insurance.</p> <p>Number of retirements varies each month. NA – not offered to retirees Approximately 2,000</p>
<p>60. How many participants are enrolled in the FSA, LFSA, and DCA?</p>	<p>HCFSA = 469 LFSA=APS does not offer DCFSA=25</p>
<p>61. For the purposes of ACA reporting, how many FEINs do you report under? How many 1095s were sent out for 2022?</p>	<p>One FEIN. We reported approximately 12,580 1095's.</p>
<p>62. What is the annual turnover percentage?</p>	<p>APS has a turnover rate consistent with other similar sized school districts in the United States. The precise rate will be discussed with the vendor awarded this contract.</p>
<p>63. How many employees are on direct bill per month?</p>	<p>Average of 58</p>
<p>64. For carrier billing, are bills broken out by school?</p>	<p>Benefits related carrier bills are not broken out by school.</p>
<p>65. Who is your current COBRA vendor?</p>	<p>APS does its own COBRA administration.</p>
<p>66. What is the business reason for wanting the Fiscal Year in the requisition and/or PO number?</p>	<p>Internal control and use for audit trail.</p>
<p>67. What is the business reason/use for the Minimum Orders field on the vendor record?</p>	<p>Not used.</p>
<p>68. In what scenario would the District need to create a Direct PO?</p>	<p>PO's are our primary contract tool.</p>
<p>69. Please elaborate on the process of "lapsing" a PO.</p>	<p>Any PO's that have not fully expended will lapse to the next fiscal period</p>
<p>70. What survey application does APS currently use?</p>	<p>N/A – Not part of ERP.</p>
<p>71. Please confirm APS would like to see three values/balances per vendor converted.</p>	<p>This will be negotiated with awarded vendor.</p>
<p>72. Are the 13,000 APS vendors all current, unique, active vendors?</p>	<p>Some vendors are not current, but we are not certain of the exact numbers. Before the migration to a new ERP Solution, APS needs to perform a vendor purge on the Infor ERP Solution.</p>
<p>73. How many non-PO invoices are created annually by APS?</p>	<p>None – 0.</p>
<p>74. Does the current APS Procurement system use purchasing cards?</p>	<p>Yes, APS uses P-cards. Most school secretaries have P-cards for expenses such as travel expenses, memberships, subscriptions, emergency</p>

maintenance/engineering, purchases from vendors without a vendor number, etc.

75. Please confirm that it is APS's expectations that all RFP Respondents will provide guaranteed Pricing for the Proposed SaaS Solution covering a minimum of (10) Years

These are APS's expectations.

76. Can APS please provide a list of certified organizations in these categories which it recognizes?

Please see Addendum 1, Question 31.
