

August 6, 2019

ADDENDUM NO. 1
For
Enterprise Resource Planning System
Request for Proposal

This addendum no. 1 is to provide the following information:

Powerpoint slides that will be used during the Pre-Proposal Conference to be held:

August 7, 2019 10:00am-11:30am

Thurston County Courthouse
Building One - Room 152
2000 Lakeridge Dr SW
Olympia, WA 98502

There will be a remote phone bridge for up to 16 callers available at:
360-709-3000
Access Code: 7865539



ERP RFP Pre-Proposal Conference

July 2019

Welcoming Opening Remarks

- **Thurston Team Introductions**
 - **Thurston County**
 - **Project Sponsors**
 - Robin Campbell – (Assistant County Manager)
 - Diana Benson (Deputy Auditor)
 - Maria Aponte (HR Director)
 - **Project Executives**
 - Lauren Spurgeon (Compensation & Benefits Manager)
 - Denise Doty (Senior Management Analyst)
 - Darren Bennett (Financial Manager)
 - **Project Manager**
 - Brian Ferris (IT Technical Manager)
 - **GFOA**
 - Genevieve Carter
 - **Attendees in person**
 - **Attendees on the phone**

Why is Thurston County looking for a new ERP system?

- The County has been using separate systems for financial and payroll.
- The current versions of these systems are outdated
- The County also utilizes several third party systems for budgeting, cost accounting and asset tracking purposes
- The County desires better data integrity and reporting capabilities for timely decision making

Project Goals

- Improve County-wide business processes
- Utilize modern technology to increase efficiencies
 - Rely more on technology, workflow, and much less on paper
- Reduce the number of stand-alone and duplicate systems
 - The County would like to use an ERP solution where possible to integrate functionality
- Improve data reliability and reporting capabilities

Project Scope

○ Professional Services

- Design
 - Process improvement
- Configuration
- Integration
- Data Conversion
- Project Management
- Change Management
- Training

○ Software / Functional

(Attachment 6 – Functional Requirements)

■ Financials

- Accounts Payable / Receivable
- Budget
- Contract Management
- Capital Assets
- EAM
- Fleet Management
- General Ledger
- Inventory
- Projects and Grants
- Purchase Orders
- Treasury
- Work Orders

■ Human Resources & Payroll

- Applicant Tracking
- Benefits
- Human Resources
- Learning Management
- Payroll
- Positions
- Time Entry

Evaluation Process

- Three primary phases
 - Written Proposal Evaluation
 - Software Demonstrations & Interview
 - The County expects to elevate three proposers
 - Discovery
 - The County expects to elevate two proposers. Focus is on implementation.
- The County will “elevate” vendors to the next phase. Proposers are not eliminated until the contract is signed.

Key Dates

- Proposals Due
 - September 10 4:00pm (PDT)
- Onsite Demonstrations & Interview
 - 10/22 – 10/24
 - 11/12 – 11/14
 - 11/19 – 11/21
- Onsite Discovery
 - 12/11 & 12/12
- Complete Negotiation
 - February 2020
 - GFOA to assist

Submittal Requirements

- Electronic copies submitted to erpbid@co.thurston.wa.us
- Use Attachment 1, Checklist to verify submittal information
- Excel files required for:
 - Attachment 6 – Functional Requirements
 - Attachment 7 – Data Conversion
 - Attachment 8 – Staffing
 - Attachment 9 – Cost
 - Attachment 10 – Interfaces



Questions?

The County Looks Forward to Your Proposal

End of Addendum 1