Proposer Questions and BPHC Responses
Request for Proposal
for
Enterprise Resource Planning (ERP) Systems Review, Analysis and Assessment Project

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Q&A Due Date: Wednesday, July 19, 2023, by 5:00 PM EST *(1 day delay to address all questions)*
Proposal Due Date: Friday, July 28, 2023, by 5:00 PM EST

<u>Proposer A</u>

Question: Is BPHC expecting a formal ERP Needs Assessment report to be developed as part of the Project Scope or to simply document the functional and technical requirements of BPHC as one of the inputs into an ERP RFP document?
Answer: This project requires a detailed BPHC ERP Needs Assessment report as part of documenting all the system needs that are currently being met.

Question: Has BPHC concluded to conduct a single combined software/integrator RFP versus a software RFP followed by an integrator RFP?
Answer: Ultimately it is our goal to find a single combined software/integrator solution, but we are open to alternatives if it means getting a more robust system.

Question: Is there an overall budget that has been established for the project that you are able to share?
Answer: A budget has not been established.

Question: Is there a budgeted amount for the consultant phase of the project that you can share?
Answer: A budget has not been established.

Question: Have there been any recent studies related to BPHC's ERP situation and, if so:
   a. When was that work performed?
   b. Who performed that work?
   c. Can the results of that study be shared?
Answer:
   a. There was a limited general ledger system review completed during a GP upgrade about 5 years ago. There has been no review of the HR database or ADP payroll system.
   b. Work was performed by Ernst & Young.
   c. The review was geared to the GP2018 R2 upgrade and the report is not relevant to this project.

Question: Has BPHC seen any software vendor demonstrations?
Answer: No

Question: What is the proposed start date for the project?
Answer: A start date has not been determined. A start date will be negotiated after the review of the proposals.

Question: Is there an expected duration for the project?
Answer: A start date has not been determined. Since Great Plains is scheduled to be sunset, time is of the essence to complete this project.

Question: What other departments would be included in the scope for gathering requirements and conducting interviews other than Finance, Procurement, Human Resources and Budget?
Answer: In addition to Human Resources and Payroll, Finance includes Accounting, Budget, Post Award Grant Accounting, Procure to Pay (Accounts Payable and Procurement), Revenue and Information Technology Services would be included in the scope of gathering requirements and interviews.

Question: Are there any departments that would not be included in the scope?
Answer: No

Question: Is BPHC expecting interviews to occur with internal staff and external users?
Answer: Primarily internal staff will work with the chosen vendor, however, there may be a few external users that need to be interviewed (ex. CareLogic and Change Healthcare/Optum) in order to understand current workflows and suggest automation for what are now manual integrations.

Question: Is BPHC open to the consultant services being provided in a remote manner?
Answer: Yes, however, some onsite work would be desirable.

Question: Are there any systems that will be integrated?
   a. Are they vendor supported?
   b. Will communication be going out regarding their input?
Answer: Yes
   a. Yes
   b. Yes

Question: Is BPHC open for the consultant to propose additional services related to solution selection including proposal analysis, vendor demonstrations and contract negotiations?
Answer: We expect this to come in the next phase. This project is meant to document our needs and create an RFP.

Question: Is there a target date in which you would like to have the following accomplished?
   a. Release of RFP
   b. Decision on selected Solution provider(s)
   c. Start of system implementation
   d. Completion of system implementation
Answer: No
   a. This will be negotiated with the selected vendor.
   b. Too soon to be determined
   c. Too soon to be determined
   d. Too soon to be determined

Question: Are there any specific weightage criteria defined for the evaluation of the proposals? If so, can these be shared?
Answer: It has not been weighted yet but a consultant will be chosen based on their 1) qualifications and expertise in all these areas 2) project cost 3) strategy/workplan to address the scope of work, and 4) timeframe for completing the project. At this point all four (4) criteria will be equally weighted.

Question: On page 6, Proposal Requirements #1 indicates: Description of the approach to the work, including justifications for this approach and qualifications to undertake this work, no longer than two (2) pages. Is the expectation of BPHC to have the methodology included in these 2 pages, or can the methodology be expanded and detailed in a separate section?
Answer: The methodology may be expanded and detailed in a separate exhibit.

Question: Is there any specific format that BPHC would like the proposal to be prepared and presented?
Answer: We are not looking for a specific format. Proposers should submit a professionally formatted response in PDF format

Proposer B

Question: Is it possible to get an org chart of the Administration and Finance department?
Answer: We currently don't have detailed Administration and Finance org chart

Question: With regard to task #5, "including diagrams of workflows," are you looking for diagrams of current state workflows, recommended future state workflows, or both?
Answer: Both, plus we are looking for the documentation for workflows we are lacking.

Question: Are you currently using Dynamics for performance management, applicant tracking, or learning management at all?
Answer: No.

Question: Do you have a budget defined for this project?
Answer: A budget has not been established.

Proposer C

Question: How many users currently interact with the individual systems today?
Answer: We estimate 100 - 150 administrative users of the systems being evaluated; however, all 1,300 employees have access to ADP.

Question: Are there other systems not documented in the RFP that push or pull data from the systems listed that would need to be taken into consideration? Please provide a list if possible.
Answer: We use CareLogic for Recovery 3rd party billing, Change Healthcare (Optum) for EMS 3rd Party billing and Bank of America is our banking partner.

Question: Could BPHC provide a system architecture document comprehensive of the entire system landscape?
Answer: No

Question: What is the extent of the requirements around Hyperion? (or modules utilized)
Answer: Oracle Hyperion is currently a stand-alone manual system used for budgeting that we hope to see eliminated in a new system. We do not use the budget module in Great Plains.

Question: Approximately how many team members for BPHC expect to be involved with the assessment process (broken out by function)?
Answer: We estimate up to 80 staff. There are approximately 34 users in Finance, 15-20 in HR, 5-10 in ITS, and 10-15 fiscal staff in bureaus

Question: Approximately how many employees and users fall under the HRIS today? (not just usage but overall BPHC employee count)
Answer: ≈1300

Question: For purposes of this assessment will provider be able to evaluate all processes that fall under the umbrella of your ERP & HRIS system or is the project limited to the defined areas under the scope of work section in the RFP?
Answer: All ERP and HRIS system processes are available to assess in this project.

Question: Is there a preferred format that BPHC would like for the initial RFP response (PowerPoint, Word, etc.)?
Answer: We are not looking for a specific format. Proposers should submit a professionally formatted response in PDF format.

Question: Does BPHC have a general timeline for when they would want to start the assessment project?
Answer: A start date has not been determined.

Question: Are there any key blackout periods or personnel constraints provider should consider when building out their project plan? (i.e. personnel will only be able to dedicate X amount of hours per week to project or HR team is completely unavailable during X time period)
Answer: Once a project period is established, we will determine potential blackout periods. For instance, staff time will be limited during the annual external yearend external audit.

Question: Will vendor have a singular PM to coordinate on BPHC's side or does vendor expect proposer to cover all PM roles & activities?
Answer: BPHC will identify a PM to work jointly with the PM of the chosen vendor.

<u>Proposer D</u>

Question: If selected for the ERP Systems Review, Analysis, and Assessment Project, will the consultant be precluded from bidding and performing the next phase(s) of the ERP work – for example, program management, system integration, data migration, design and implementation of ERP system?
Answer: Submissions to BPHC RFPs are selected based on BPHC's internal procurement policy. Vendor can submit a response to both RFPs with certain conditions that BPHC will outline in the RFP documents

Question: The RFP did not specify the period of performance for this work. When does BPHC wish to start and end this project?
Answer: A start date has not been determined. A start date will be negotiated after the review of the proposals. As far as project completion date, since Great Plains is scheduled to be sunset, time is of the essence to complete this project.

Question: Regarding proposal requirements (on page 5) – does the two-page limit outlined in item #1 include anticipated timeline and workplan? Is there a page limit for the overall proposal?
Answer: The anticipated timeline and workplan is not included in the two-page limit, however we request a concise submission, therefore we will not reject a proposal with more than two pages.

Question: Questions regarding current workflows / documentation:
   1. What is the user population (# of users) for each in-scope system / module?
   2. What are the quantity of workflows (by business unit)?
   3. When was the most recent process workflows completed?
   4. What is BPHC's current process for maintaining documentation?
   5. What are the processes in scope for the HCM module (e.g., is benefit included)?

Answer:

1. We estimate ≈80 staff. There are approximately 34 users in Finance, 15-20 in HR, 5-10 in ITS, and we have 10-15 fiscal staff in bureaus.
2. Difficult to quantify workflow by business unit but if consultant has expertise in all these areas, we are not any different than most entities
3. 5 years ago, for the Finance General Ledger System but not to the extent needed for this proposal.
4. Many of BPHC's current financial systems are over 20 years old and lack documentation.
5. The HCM model should: include a system that can encompass recruitment, employee data management, performance management, training and development, compensation and benefits administration, payroll processing, succession planning, manager/employee self-serve etc.
   a. handle essential HR functions such as employee data management, employee onboarding, offboarding, and record-keeping. It should maintain a central repository of employee information, including personal details, job history, performance data, etc.
   b. support the entire recruitment process, including job posting, candidate sourcing, applicant tracking, resume screening, interview scheduling, and candidate selection.
   c. although we will have a performance management system, the HCM should have the capability to facilitate goal-setting, performance evaluation, and feedback mechanisms. It should also provide tools for managers and employees to set objectives, track progress, conduct performance reviews, and offer continuous feedback even if it is not needed initially.
   d. although we are getting an LMS, it should offer features for creating and delivering training programs, managing learning resources, tracking employee skill development, and identifying learning gaps. It should support both formal training initiatives and informal knowledge sharing.
   e. handle payroll processing, compensation management, and benefits administration. It should calculate salaries, manage pay scales, administer bonuses (when applicable) and ensure compliance. It should also support the 8 unions we have and their intricacies.
   f. should support succession planning by identifying high-potential employees, assessing their readiness for advancement, and providing career development opportunities.
   g. offer self-service capabilities, allowing employees to access and update their personal information, view pay slips, submit leave/accommodation and workers comp requests, and access relevant HR policies and documents.
   h. offer manager self-service capabilities allowing managers to view and manage their team members' information, including employee profiles, contact details, job history, and organizational hierarchy, have access to time and attendance records of their team members, to identify development needs within their teams and recommend or assign appropriate training and development programs, have visibility into their team members' compensation information, including salaries, They should be able to initiate salary changes, recommend promotions, and manage compensation adjustments within approved guidelines, have the ability to identify high-potential employees within their teams and make recommendations for career advancement or succession planning, initiate and participate in employee recognition programs, to approve or reject various HR-related requests and workflows initiated by their team members, such as leave requests, expense claims, or training requests.
   i. provide robust analytics and reporting capabilities.
   j. assist with compliance to labor laws, industry regulations, and data protection standards.
   k. to integrate with other systems, i.e. Finance and ITS

<u>Proposer E</u>

Question: Would the Commission be open to expanding the proposal's page count so it may receive a more complete response? Reference to RFP: Proposal Requirements – Page#6
Answer: A timeline schedule or workplan may be submitted as an exhibit in addition to the two-page limit, therefore we will not reject a proposal that contains more than two pages. We do request a concise proposal.

Question: Does BPHC require any support in conducting initial requirements gathering for the future-state ERP? Reference to RFP: Scope of Work – Page#4
Answer: Yes

Question: Is there a deadline or specific timeframe by when BPHC desires to complete this project and release the RFP? Reference to RFP: Proposal Requirements – Page#6
Answer: A start date has not been determined. A start date will be negotiated after the review of the proposals. As far as project completion date, since Great Plains is scheduled to be sunset, time is of the essence to complete this project.

<u>Proposer F</u>

Question: In the section titled 'Scope of Work' which begins on page 4 it includes Payroll as one of the functionalities that the replacement system should include. In the 'Project' section which begins on page 2 it lists the modules of the current ERP but doesn't list what is currently being used for Payroll? Can you share what system is currently being used for Payroll?
Answer: BPHC is currently using ADP Enterprise for payroll and recruiting.

Question: In the 'Proposal Requirements' section which begins on page 6, #6 states 'If you are an LLC, provide the appropriate documentation along with your proposal.' Can you provide some clarification of what documentation is being requested?
Answer: This request may be disregarded and instead will be addressed during contract negotiations with the selected vendor.

Question: Can you please confirm the number of full-time, part-time, contract employees and volunteers?
Answer: ≈1300 employees

Question: Has a budget been established and approved for this ERP systems review, analysis and assessment project? What is the approved budget amount?
Answer: A budget has not been established.

Question: Has a budget been approved for the eventual purchase of an ERP solution? What is the approved budget amount?
Answer: A budget has not been established. It is our goal to implement a system that is robust, user friendly, fully automated and capable of growing with BPHC.