

State of West Virginia



Pre-Bid Conference

RFP # FAR226005

Enterprise Resource Planning (ERP) Software and Services

February 1, 2011



Pre-Bid Conference Agenda

- **Welcome and Opening Remarks** - Glen B. Gainer III, State Auditor
- **ERP Project Team** - Todd Childers, Project Director
- **Ground Rules, Administrative Requirements, and Schedule of Events** – Krista Ferrell, Buyer Supervisor, Purchasing Division
- **Project Scope, Services Requested, and Selected RFP Topics** - Todd Childers, Project Director
- **Break**
- **Question and Answer Forum**



ERP Project Team

■ ERP Project Team

- Todd Childers, Project Director
- Ross Taylor, Project Manager
- Greg Hodge, Treasury Team Lead
- Shawn Carper, Finance Team Lead
- Dan Miller, Procurement/Logistics Team Lead
- Stephanie Ankner, HR/Payroll Team Lead
- Kim Asseff, Transportation Team Lead
- Rick Pickens, Technical Team Lead

■ Salvaggio, Teal and Associates

- Mitt Salvaggio, President
- Randy Meek, Project Director
- Drew Thigpen, Project Manager, Pre-Implementation
- Robert Cooney, Project Manager, Implementation

Ground Rules and Administrative Requirements



- Attendees are required to sign-in
- Verbal communications are not binding. Only information published in the RFP or as an official written addendum is binding
- Single point of contact for the State regarding this RFP
 - Krista Ferrell, Buyer Supervisor, State Purchasing Division
krista.s.ferrell@wv.gov
- The Attendee list and the slides used in today's presentation will be posted in the *West Virginia Purchasing Bulletin*

Ground Rules and Administrative Requirements



- All questions must be submitted in writing – No verbal questions are allowed
- Ground rules for Question and Answer Forum
 - Complete and submit questions on the provided form at the start of the break
 - Questions will be screened and directed to appropriate person to answer
 - Some questions may not be answered today
 - All questions on a completed form will be treated as written inquiries and responses will be included in an official addendum to the RFP

RFP Schedule of Events (Sec. 1.3)



EVENT		DATE
1.	RFP Issued	Fri., Jan.14, 2011
2.	Pre-Bid Conference	Tue., Feb. 1, 2011
3.	Deadline for Vendors to Submit Written Inquiries	Wed., Feb. 9, 2011
4.	Responses to Vendor Inquiries Provided	Fri., Feb. 25, 2011
5.	RFP Bid Opening Date	Wed., Mar. 23, 2011, 1:30 pm
6.	Software Demonstration and Vendor Oral Presentation Information Distributed	Mon., Mar. 28, 2011
7.	Scripted Software Demonstrations and Vendor Oral Presentations Scheduled	Mon., Apr. 18 - Fri., May 27, 2011

RFP Schedule of Events - Continued



EVENT		DATE
8.	Cost Proposal Opening Date	TBD
9.	Anticipated Discussion Period per West Virginia Code, §5A-3-11b	TBD
10.	Anticipated Request for Best and Final Offer (BAFO) Issued to Qualified Vendors	TBD
11.	BAFO Opening Date	TBD
12.	Final Evaluation and Ranking of Vendors	TBD
13.	ERP Implementation Begins	TBD



Proposal Submission (Sec. 3.4)

- Proposals must be received in two distinct parts: technical and cost
 - Technical proposals must not contain any cost information relating to the project
 - Cost proposal shall be sealed in a separate envelope and will not be opened initially
- Proposals must be received prior to the scheduled bid opening
- Must submit one original Technical and Cost Proposal, and five copies and two CDs of each

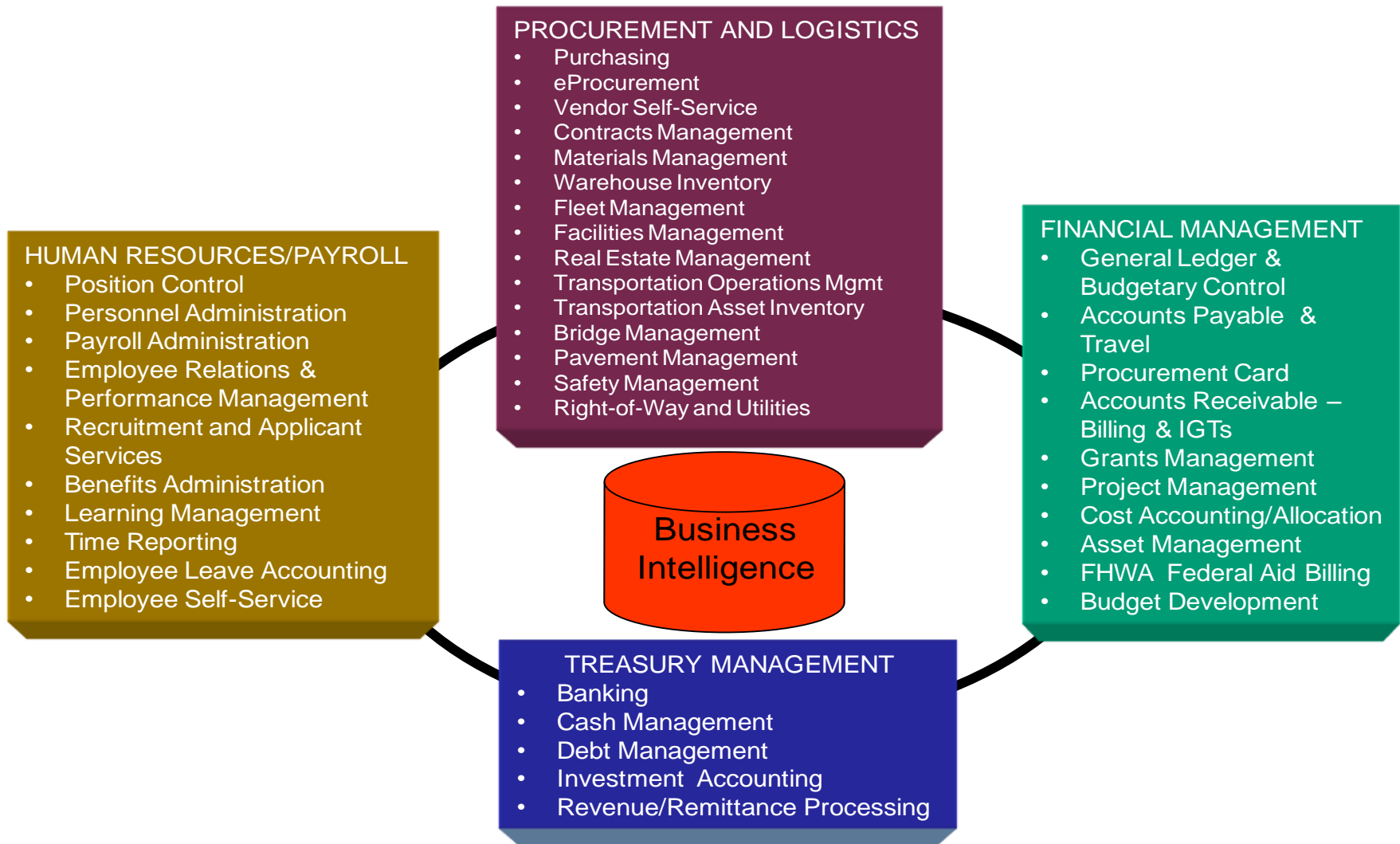


Mandatory Requirements (Sec. 2.5)

- Failure to meet any mandatory specifications shall result in the disqualification of the proposal
 - Single Vendor to Execute the Contract (Sec. 2.5.1)
 - Demonstrated Implementation Services Experience (Sec. 2.5.2)
 - Demonstrated ERP Software Provider Experience (Sec. 2.5.3)
- The terms “must,” “will,” “shall,” “minimum,” “maximum,” or “is/are required” identify a mandatory item or factor
- As an exception, use of these terms in Appendix M - Functional and System-wide Requirements identify expected items instead of mandatory items



Anticipated Project Scope (Sec. 2.7.1)



Selected RFP Provisions



- **Categories of Services Requested in RFP**
 - ERP and other software required to address requested functionality (Sec. 3.3.1.7)
 - On-going software maintenance (Sec. 3.3.1.7.3)
 - Implementation services (Sec. 2.10)
 - One major software upgrade (Appendix K)
 - Host initial development environment (Sec. 2.10.22)
 - Acquire and establish the State's ERP production environment (Sec. 2.10.22)
 - Provide services to support the State's production environment (Sec. 2.10.21)

Selected RFP Provisions



- **Key Implementation Services**
 - Project management (Sec. 2.10.1)
 - Technical architecture and infrastructure design (Sec.2.10.2)
 - System analysis and business process design (Sec. 2.10.3)
 - Software configuration (Sec. 2.10.4)
 - Customizations (including forms, custom reports, automated interfaces, software enhancements and modifications, and custom workflows) (Sec. 2.10.5 – Sec. 2.10.10)
 - Data conversion (Sec. 2.10.11)
 - Security configuration (Sec. 2.10.12)
 - Testing (Sec. 2.10.13)

Selected RFP Provisions



- **Key Implementation Services – Continued**
 - Training, documentation, online help and knowledge transfer (Sec. 2.10.14 – Sec. 2.10.17)
 - Communications and change management (Sec. 2.10.18)
 - Deployment (roll-out) support and production transfer (Sec. 2.10.19 – Sec. 2.10.20)
 - Production maintenance and support and ERP operations environment (Sec. 2.10.21 – Sec. 2.10.22)

Selected RFP Provisions



- **Items for Special Consideration** (Sec. 2.9)
 - Includes items that may differentiate the WV ERP initiative which should be addressed in the proposed solution
 - The following items merit extra consideration
 - Public Employees Insurance Agency (Sec. 2.9.3)
 - Travel (Sec. 2.9.16)
 - Applicant Services (Sec. 2.9.17)
 - Bridge Management, Pavement Management, and Safety Management (Sec. 2.9.18.6 – Sec. 2.9.18.8)

Selected RFP Provisions



- **Functional and system-wide requirements submission (Sec. 3.9)**
 - State has contracted with Advantiv Solutions for the use of the DecisionDirector® RFP Response Management System (DD2)
 - Vendors must utilize DD2 to respond to the requirements
 - Vendors must contact Advantiv to request their secure, on-line response environment within DD2 (**Appendix M**)
 - Advantiv may provide technical support regarding the use of the DD2 system

- **Functional and system-wide requirements (Appendix M)**
 - Vendor functional response definitions – support and source
 - Vendor system-wide response definitions – support

Selected RFP Provisions



- **Additional functional and system-wide requirements submission specifications (Sec. 3.3.1.15)**
 - Vendors must submit a copy of their responses in DD2 as part of their RFP bid submission
 - Vendors must also submit a certification that the copy of their DD2 responses match the Vendor's responses in DD2
 - Vendors must include a soft copy PDF of their DD2 responses on the CDs submitted with the RFP bid submission



Pre-Implementation Activities

- **Selected ERP Pre-Implementation Activities:**
 - Development of ERP Governance Structure
 - Development of ERP Project Team Structure
 - Documentation of State administrative systems
 - Review of chart of accounts
 - Review of vendor files
 - Review and document functional, general and technical requirements
 - Review and document “As-Is” business processes

Scheduled Break



- Please submit all completed questions at this time
- We plan to take a 20 minute break to sort, review and determine which questions we will answer following the break
- Please be seated in 20 minutes so that we may begin the Question and Answer Forum

Question & Answer Forum



RFP # FAR226005 Pre-Bid Conference
Vendor Question Submission Form - Please Print Legibly

Submitter Name: _____

Vendor Firm: _____

Question and RFP Section (if known): _____



**Thank you for
your
participation!**