

Yorba Linda Water District

RFP for Project Management Services – Questions and Responses

1. Page 8, Section C: Is the District agreeable with vendor proposals that present approaches that consolidate some of the deliverables for efficiency? For example, the Current State Assessment Report and Gap Analysis in Phase 1; or the Project Management Plan/Communications Plan/Stakeholder Register?

Yes, the District is agreeable to consolidation of deliverables if these consolidations are clearly presented in the response to the RFP by the consultant.

2. Page 8, Section C, subsection 2 (Phase 2 – ERP Procurement and Software Selection), is the District able to confirm that the intent of the language related to the fifth bullet point in Consultant Responsibilities is for the selected consultant to provide an objective (without inserting opinion, assumption, or subjective perspective) review and output related to the vendor proposals as opposed to participating in the formal review and scoring of proposals?

No, the District's intent is for the consultant to participate in the formal review and scoring of the proposals utilizing their expertise in this area.

3. Page 8, Section C, subsection 2 (Phase 2 – ERP Procurement and Software Selection), is the District open to consultants developing materials, logistics, and sample questions and/or surveys for the reference check process for the District to then conduct the reference checks?

Yes, the District is open to this and would welcome this approach.

4. Page Section III Section B subsection 4 Cost Proposal: Is there a budget or budget range for the phases of work commencing with the assessment leading through support of contract negotiations that can be shared?

The District is not providing a budget or budget range. Proposers should provide their best pricing for the scope of work beginning with Phase 1 – Project Initiation, Current State Assessment and ERP Requirements Development, through Phase 6 – Go-Live and Stabilization. The cost proposal should include pricing as outlined on page 18 of the RFP.

The response to this RFP should include pricing for ERP implementation support (Phase 4). Please see question #14 for an additional question and response regarding pricing for the ERP implementation phase of support.

5. Page 25, Appendix C: Would the District consider proposed exceptions to its terms and conditions? As a professional services firm, we are aware of the limitations on exceptions and additional constraints. If selected for this project, we fully expect to work with the District to reach an agreement on terms and conditions that is fair and beneficial to both parties.

Any requested changes to terms and conditions must be described in full within the consultant's response to the RFP.

6. Section III.A, page 14 requires five completed ERP selection and implementation projects for California public agencies. Must each qualifying project have included both software selection and implementation oversight, and may the prime contractor satisfy this requirement using projects performed by proposed subconsultants or key personnel while employed by another firm?

Each qualifying project does not have to include both the software selection (procurement) and ERP implementation. However, as a whole, qualifying projects must demonstrate experience in both areas.

No, the prime contractor may not use subconsultants.

Yes, qualifying experience by key personnel while working for a previous employer/firm may be used.

7. Sections II.C and III.A, pages 7 and 15 prohibit the consultant from acting as an ERP vendor, reseller, or implementation partner. Would a firm that licenses unrelated government SaaS products, but has no financial or contractual relationship with any prospective ERP vendor, remain eligible, and would selection under this RFP preclude that firm or its affiliates from participating in the subsequent ERP procurement?

As stated on page 6 of the RFP, the consultant shall not serve as the ERP software vendor, ERP implementation partner, software reseller, or receive compensation from any software vendor related to this project.

Any conflicts of interest perceived must be disclosed in the proposal response. See page 14 of the Request for Proposals.

8. Please provide the District's approved or planning-level budget for this engagement and any anticipated consultant hours or staffing assumptions by phase, particularly for implementation oversight from January 2028 through project closeout.

See response to question #4.

9. Will the Business Central Readiness Assessment be made available to registered proposers before the proposal deadline, and can the District confirm whether Business Central is simply part of the existing research or is currently considered a preferred ERP direction?

No, the Business Central Readiness Assessment document will not be made available prior to the proposal deadline. Business Central is part of existing research into available ERP systems and is not considered a preferred ERP direction. The District does not have a preferred ERP system.

10. Section II.C describes the consultant as the District's primary project manager, while Section IV.F states that District staff will manage schedules, budgets, risks, change control, and component projects. Please clarify the expected division of responsibility, required onsite presence, and anticipated meeting cadence for the consultant.

The District believes section II.C clearly states that the consultant selected will serve as the District's Project Manager for the planning, procurement, selection, contract negotiation, implementation, testing, and go-live of a new ERP System.

See response to question #15 below regarding required onsite presence.

The consultant may include their suggested meeting cadence as part of their proposal.

11. Has the District established a budget for ERP software selection services through contract negotiations? If so, what is the allocated amount?

See response to question #4.

12. Has the District allocated a budget for the new ERP system implementation costs (one-time) and annual subscription fees? If yes, what are those budgeted amounts?

The District's focus is on choosing a system that will work well for the District for many years to come, balancing the cost of the system with operational usability and efficiency of the system. We are looking for a project management consultant to help us choose a system based on both factors and are open to adjustments to the budget based on the needs of the District.

13. Did the District engage a consultant to assist in developing this Request for Proposals? If so, will that consultant be permitted to submit a proposal for this engagement?

No, a consultant was not engaged to assist in developing this Request for Proposal.

14. Implementation services will be dependent upon the final vendor selected, their implementation approach, final project scope, and available District staff resources. Is the District willing to accept time-and-materials pricing with hourly rates for these services until the full scope can be determined?

The District is willing to consider time-and-materials pricing with hourly rates for implementation services until the full scope of the implementation can be determined if a not to exceed amount is also included.

15. How much of the selection and implementation project management services are intended to be performed on-site versus remotely?

While the District understands the occasional need for and efficiency of remote meetings, the District's preference is for on-site meetings whenever feasible. Consultants may include their availability and preference regarding on-site and remote work as part of the proposal.

Additionally, the District is on a 4 10-hour workday schedule with the office open between 7:00 a.m. and 6:00 p.m. on Monday through Thursday, with the office closed on Fridays. All meetings would need to occur within these hours Monday through Thursday.

16.The RFP includes a list of core functions that the District is expecting in a new ERP. Is the District interested in any of the following: contract management, grant management, talent management.

The District is open to exploring what the ERP systems' capabilities are within these functions. However, these areas are not considered critical to the District's success in an ERP implementation, and the District does not wish to make these areas a requirement. It would be considered an added benefit if the ERP system selected included and performed well in these areas, but not a primary deciding factor in the selection of the system.

17.The RFP mentions "improve business processes" as a project objective. Is the District interested in current and future state process mapping for key business processes, or is only a detailed review/discussion of each business process preferred?

Improving business processes is a project objective and the methodology utilized by the consultant to achieve this objective will be considered. The District is open to different methodologies.

18.The RFP includes Training and Organizational Change Management as part of phase 5 to support implementation. Is the District interested in any change management activities during the initial phases leading up to implementation?

Yes, the District is interested in change management during the initial phases leading up to implementation.

19.Does the District have a target budget for the ERP project management services and ERP system/implementation?

Please see response to question #4 and question #12.

20.The RFP states "The proposed assigned Project Manager should demonstrate local experience working with five (5) comparable ERP projects completed within the past ten years." How does the District define "local"? Does this mean the state of California, the western US, or something else?

Local is defined as the state of California public sector.

21. The RFP includes a list of core functions that the District is expecting in a new ERP. Is the District interested in any of the following: contract management, grant management, talent management.

Duplicate question.

22. The RFP mentions "improve business processes" as a project objective. Is the District interested in current and future state process mapping for key business processes, or is a detailed review/discussion of each business process sufficient?

Duplicate question.

23. The RFP includes Training and Organizational Change Management as part of phase 5 to support implementation. Is the District interested in any change management activities during the initial phases leading up to implementation?

Duplicate question.

24. Does the District have a target budget for the ERP project management services and ERP system/implementation?

Duplicate question.

25. The RFP states "The proposed assigned Project Manager should demonstrate local experience working with five (5) comparable ERP projects completed within the past ten years." How does the District define "local"? Does this mean the state of California, the western US, or something else?

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