



# Project BISON: RFP 23RFP8918 for ERP Software and Implementation Services

PRE-PROPOSAL CONFERENCE

August 11, 2023

# Agenda

- Introductions
  - Jim Terwilliger, Commissioner of the Bureau of Finance and Management (BFM)
  - Colin Keeler, Director of Financial Systems , BFM
  - Jason Lutz, State RFP Contact & Project Manager, BFM
  - Jeff Clines, Commissioner of the Bureau of Information and Telecommunications (BIT)
  - Information Services Group (ISG)
- **Opening Remarks from BFM Commissioner Terwilliger**
- Purpose of RFP
- About the RFP
  - Schedule
  - Mandatory Requirements
  - Scope of Software and Services
  - Other Scoping Parameters
- RFP Submission
- Q&A

# Welcome

Opening Remarks

## Jim Terwilliger, State CFO

Commissioner, South Dakota Bureau of Finance and Management

## Before We Begin...

- This presentation is posted on BFM's website at <https://bfm.sd.gov/solicitations/>.
- Please hold your questions until the Q&A session at the end.
- Additional questions after this call may be submitted in writing. The deadline for submission of questions is 5 pm Central time, Friday, August 18.
- Verbal representations or responses to questions at this conference are not official. Offerors are to rely on written statements issued as an RFP addendum. Any other communication will be considered non-binding on the State.
- Communication related to this RFP directed to parties other than the RFP Contact may result in disqualification of the Offeror.
- Nothing in this presentation alters the RFP. In the event of a conflict, the RFP and its official amendments shall prevail.

# Purpose of RFP

- Project BISON – Business Information System for Operational Needs
- The State has initiated its internal Project BISON and is issuing this RFP to procure a fully integrated, comprehensive ERP solution and the associated implementation services for a statewide deployment of the new solution.
- These state agencies are the primary business owners responsible for the identified core functions:
  - Bureau of Finance and Management – Financials and Budgeting
  - Bureau of Human Resources and Administration – Procurement
  - Bureau of Information and Telecommunications – Technology and Technology Procurement
- Objectives for Project BISON
  - Reduce the State’s sizable technology risk exposure;
  - Resolve much of the fragmentation of the State’s existing administrative systems environment;
  - Incorporate functionality that meets federal security standards (e.g., NIST), including FedRAMP Moderate certification;
  - Provide for a single Procurement system that would be fully integrated with the financial management functions;
  - Provide for better tracking and management of the State’s projects and assets;
  - Achieve process standardization based on best practices across the State;
  - Provide a more flexible solution to meet evolving business requirements;

# About the RFP

## ● RFP Schedule of Activities

- RFP Publication: Wednesday, August 2, 2023
- Pre-Proposal Conference: Friday, August 11, 2023. 10 am Central
- Offeror Questions Due: Friday, August 18, 2023, 5 pm Central
- Responses to Offeror Questions: Friday, August 25, 2023
- Proposals Due for Submission: Friday, September 15, 2023

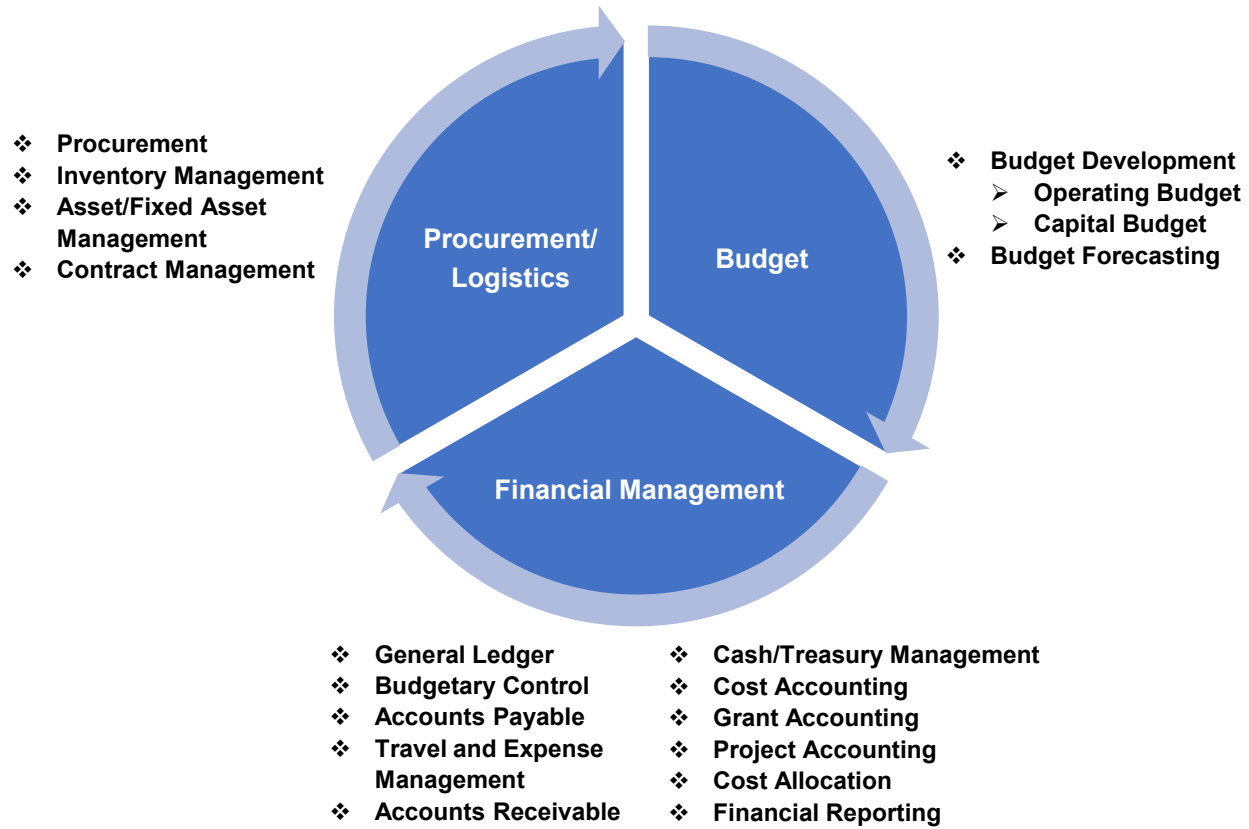
## ● There are six components of the RFP package that were published to the vendor community

- Request for Proposals primary document (required response: RFP Section 7)
- Attachment 1: System Requirements (functional and general/technical requirements) (required response)
- Attachment 2: Cost Schedules (required response)
- Attachment 3: Current Integrations Inventory
- Attachment 4: Data Conversions
- Attachment 5: Model Statement of Work (SOW)
- Attachment 6: Standard Services Contract Template

# Mandatory Requirements

1. All proposals must include all software within scope (see RFP Section 3) and all requested implementation services (see RFP Section 4). Proposals that present and bid only software or only services will be disqualified upon receipt.
2. The software product is proposed and delivered on a Software-as-a-Service (SaaS), Platform-as-a-Service (PaaS), or Cloud ERP basis.
3. Financial Management, Budgeting and Procurement/Logistics components of the Offeror's proposed ERP solution must be in production entity-wide for either a:
  - a. U.S. state government; or a
  - b. U.S. city or county government of comparable size and complexity to the State. For the purposes of this RFP, "comparable size and complexity" is defined as an annual budget of at least \$1 billion and a minimum of 8,000 full-time employees.
4. Financial Management and Procurement/Logistics core components are fully integrated and provided by the same ERP solution provider. The State acknowledges that certain specialized functions may require third-party software solutions.
5. Offeror's proposed ERP solution must have single sign-on (SSO) functionality and integrate with the State's standard SSO/identity management service. Acceptable SSO industry standard protocols include OAuth 2.0 and OpenID Connect.
6. The primary implementation services contractor will be required to be a certified partner of the proposed software product, if that designation is available.
7. The primary implementation services contractor will be required to show that it has completed, as primary provider of services (more than 50% of implementation services to customer), an implementation of the proposed software product at a US state/local government or state agency/organization.

# Software Scope





# Services Scope

- The Offeror shall propose all services necessary to deploy the proposed Budget, Financial Management, Procurement, and Logistics functionality.
  - **Project Management Services**
    - “...provide a Project Manager (PM) for the duration of the project, who will partner with the State’s Project Manager as the primary managers and coordinators for all implementation efforts”
    - Contractor will present a comprehensive work plan within 45 days of project start date
  - **Functional Team Services**
    - “...provide expertise and manage configuration in all functional areas in partnership with State subject matter experts (SMEs), with the understanding that State SMEs will make final business decisions”
    - Contractor to perform an analysis of requirements specific to the South Dakota Department of Transportation, to better understand the complexities involved in supporting SDDOT on the new ERP solution
  - **Technical Team Services**
    - “...provide technical expertise and mentorship on software and technical development, and will work with the State technical lead on architecture/strategy for conversions, integrations, and reporting/analytics”
    - Conversions: the State will be responsible for cleansing, preparing and extracting data from legacy systems in a Contractor-supplied format, and Contractor will be responsible for loading and technical validation of the data into the new system
    - Integrations: The Contractor and State staff will share the effort on integrations, 75% Contractor and 25% State, with the understanding that the State will require the Contractor to provide development support and mentoring
    - Reporting: Contractor will be responsible for Annual Comprehensive Financial Reports plus 150 reports (to be determined); plus a Development Pool for other agreed reports or integrations, with Pool hours paid as items completed

## Services Scope (continued)

### – **Organizational Change Management**

- “... support State project management and change management staff develop the Organizational Change Management and Communications plans, and support their execution for the duration of the project”
- Contractor will provide two resources: a senior Change Management and a Communications Lead for planning and leadership in this area

### – **End User Training**

- “...develop, direct, and execute the end-user Training Strategy and Plan”
- Contractor must provide a senior Training Lead who will work with the Change Management Leads
- The Contractor and State staff will share the effort on End User Training, 80% Contractor and 20% State, with the understanding that the Contractor will be responsible for train-the-trainer sessions with State training resources, and the State will administer training enrollment and lead all instructor-led classes

- See RFP Attachment 5, Model Statement of Work, for additional important detail regarding the services and deliverables expected by the State as part of the project.

## Other Scoping Parameters

- Assume projects starts no earlier than April 1, 2024 (you may assume it will start later) and goes live July 1, 2026 at start of state fiscal year
- Fixed fee bid – Deliverable-based payments. Software and services will be quoted on Attachment 2 for FY2024 through FY 2033. Note that FY24 (end 6/30/24) will be a partial year of cost
  - Include cost for 5000 hours in Development Pool, although these will be paid only as consumed
- Key Personnel from consulting firm
  - Offeror will name at least six staff as Key Personnel: the Project Manager for the engagement, at least three Functional leads, a Technical lead and a Change Management lead
  - The State requires named resources for the six key positions and will not accept representative
  - The State expects that the six named Key Personnel will be the resources assigned to the project
- Remote delivery: The State expects no more than 10% overall of consultant time will be delivered on-site, but distribution of remote work will be determined during contract negotiations by role and project need
- Alternative approaches are welcome if they can offer:
  - Improved outcomes
  - Better functionality
  - Lower risk
  - Lower cost

# Proposal Submission

- Submit Technical Proposal and Cost Proposal as separate documents
- Do not put cost information in the Technical Proposal
- The completed Attachment 1 (System Requirements) and Attachment 2 (Cost Schedules) must be submitted in the Excel format provided by the State
- Submission may be by email to RFP Contact, or sent on a flash drive to address in RFP Section 6.8
- See file naming requirements in RFP Section 6.7
- If email:
  - Maximum size for one email is 20MB
  - See RFP Section 6.7 if more than one email is required for the Technical or Cost Proposal

# Questions

- Reminder: this call is scheduled for one hour
- The State may not have verbal answers to all questions during this call
- We will try to address questions in this priority:
  - Questions already submitted
  - "Raise Hand" and we'll call on you
  - Put a question in the chat
  - Turn on microphone (camera optional) and ask (avoid interrupting)
- Official answers only to questions emailed to [ERP@state.sd.us](mailto:ERP@state.sd.us)  
and published to <https://bfm.sd.gov/solicitations>



Submit written questions to:

Jason Lutz

[ERP@state.sd.us](mailto:ERP@state.sd.us)

All questions due by 5 pm Central, Friday August 18



# Thank You!