



Rancho Murieta Community Services District

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Rancho Murieta Community Services District Request for Software and Implementation Services for an Enterprise Resource Planning July 14, 2021

To: All Potential Proposers THIS IS AN ADDENDUM TO WHICH SPECIAL ATTENTION SHOULD BE GIVEN IN ORDER TO PRESERVE THE VALIDITY OF ANY PROPOSAL SUBMITTED PURSUANT TO THE ABOVE REQUEST FOR PROPOSALS (RFP).

Below are Questions received and answered by District:

1. How many Utility Billing Customers / Accounts does the District currently have?
 - ***The District has roughly 2800 homes with a population of approximately 6000.***
2. We do not have all the modules. Can we propose what we have which are partial?
 - ***The District will discuss the different offerings by the vendors. If you do not have all the modules requested, please state so in your bid, and the District will work with you as appropriate. The District is open for partnership among the primary vendor and a third party.***
3. What is the total quantity of data in the current environment?
 - ***Unknown at this time. The selected vendor will collaboratively work with the District on the assessment of the data. Also, please refer to question 4 below.***
4. What is the format of the current data?
 - ***Great Plains is the primary system. The data is structured in the system. The selected vendor will work collaboratively with the District on the format of the data.***
5. Share the list of applications from which the data needs to be extracted.
 - ***Great Plains Dynamics, Aestiva, Ablesoft Platinum Utility Star, PayChex, and Simplicity Software***
6. What is the approximate amount of data per application to be converted and moved to new ERP?
 - ***Unknown at this time. The district does not plan to convert multiple years of data. The plan is to start with a day-1 as much as feasible.***
7. A list of programming platforms currently used.
 - ***The District does not do any programming. There is a business partner that will collaborate with the selected vendor on such discussions.***
8. A list of existing workflows.
 - ***The District is planning to adopt the workflows embedded in the new SaaS/COTS solutions.***
9. What are the training needs expected post-implementation?
 - ***Keeping up with updates and new features. New employee training once or twice a year.***
10. Will the Agency need both End-user and Train the Trainer training.
 - ***Yes.***
11. The Agency expectation of onsite resource requirement for this implementation.
 - ***This is up to the vendor. The District would expect the vendor to provide the necessary support for a successful project.***

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12. Are certain number of offshore technical resources acceptable by the CSD?
 - **Yes**
13. Reporting requirements in detail like types of reports for each module.
 - ***The District will collaborate with the selected vendor on deciding on the available reports generated out of the SaaS/COTS solution. Some custom reports will be developed if they are not readily available. We would expect the vendor to provide the necessary support for a successful project.***
14. Key personnel from the Agency proposed to participate in the project.
 - ***General Manager, Chief financial Officer, Accounting Manager, Accountant, Maintenance staff, (HR staff, Payroll staff, Utility Billing staff, GL staff, Fixed Asset staff, are all included in this list).***
15. What will be Key Responsibility Areas of the Agency's resources towards this implementation.
 - ***We plan to assign a project manager. We will also use existing staff as needed throughout the project. The vendor needs to plan with that the District has limited resource.***
16. Would the Agency be open to other technology platforms apart from Microsoft?
 - **Yes**
17. What would be the average ticket count per month and their severity?
 - ***The tickets today average around 6 a month. Very small volume of tickets as the system is stable.***
18. Is there APIs developed for all the applications and/ interfaces to be integrated (I) with the new proposed ERP?
 - ***Currently we have a limited number of API. At this time, we are asking for a complete solution that will eliminate our existing applications.***
19. Specify how long the Period of Performance for this opportunity is
 - ***This engagement assumes the vendor will continue supporting the SaaS/COTS system for as long as the District is using it. The District expects a long-term business relationship.***
20. Is there any Incumbent for this RFP? If yes, suggest.
 - **N/A**
21. Are there any specific formatting instructions like font type and size, any margins specific?
 - ***The District is not mandating any format besides what is published in Section 4.2 Technical Proposal Organizational Guidelines.***
22. Is there any page limit for the response document?
 - ***No limit. This said, the District expects the vendor bid/proposal address all the RFP requirements.***

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