



# SUPREME COURT OF LOUISIANA

## REQUEST FOR PROPOSALS ENTERPRISE RESOURCES PLANNING SYSTEM

Date: March 2, 2009	RFP: 10005-SCERP01
ADDENDUM #1 – Pre-Bid Material	

### PRE-BID CONFERENCE ATTENDEES

#### Pre-Bid Conference Attendees

1. Terry Levasseur, Diamond Data Systems
2. Ken Fournet, Aim Technologies
3. Mark Schexnайдре, LSI Consulting
4. Damon Sturniolo, Deloitte Consulting
5. Jennifer Cull, Sungard Public Sector
6. Jare Bvase, Sungard Public Sector
7. Joseph Scoffield, Agresso
8. Tom Grady, LATG
9. Daryl Kirkland, SAP

#### By Telephone (Those that emailed as requested) \*

10. Viv Rana, ObjectWin Technology
11. Sachn Nade, Systime.net
12. Rick Barrington, Systime.net
13. Madhu Bala, Systime.net
14. Kyle Bolger, Summerland Consulting

*\*The names of all teleconference attendees are not captured in this list.*

## **AGENDA TOPICS**

**No information discussed or disseminated at the Pre-Bid conference is intended to supersede the written Request for Proposals (RFP). All proposers are required to follow the requirements outlined in the RFP which is located on our website at [www.lasc.org](http://www.lasc.org), in the Court News section.**

### **Points of Contact**

- All communications concerning this RFP shall be submitted to Ms. Iris McGee at Schafer Consulting. Ms. McGee may be contacted via email at [imcgee@schaferconsult.com](mailto:imcgee@schaferconsult.com), by phone at 949-276-7272 or by fax at 949-276-7273. Vendors and their representatives shall not make any contact or communicate with any employees or consultants of the Court, other than Ms. McGee, in regard to any aspect of this solicitation.

### **Scope of Work**

- The Court intends to acquire and implement an integrated suite of enterprise applications that will meet present and future needs. The selected vendor will implement an application that is based on proven solutions that use state-of-the-art technologies.
- The court will only consider proposals that are compatible with SQL Server 2008 and the .NET3.5 framework.
- The Court's technology environment and standards will be provided to qualified vendors upon the execution of a non-disclosure agreement, Appendix F.
- It is the Court's intention to procure and implement the ERP solution in two phases; Phase one represents the core financial modules and Phase two represents the human resources and payroll modules.
- Core Financials, including:
  - General Ledger
  - Grant Management
  - Budget Management
  - Purchasing/Contracts
  - Accounts Payable
  - Revenue Management (AR/Billing)
  - Fixed Assets
- Human Resources and Payroll, including:
  - Applicant Tracking
  - Leave Management
  - Personnel Management
  - Benefits Administration
  - Position Control

- Payroll
- Timekeeping
- The Court is open to new features and technologies not directly addressed by the requirements matrices detailed in this RFP.

### **RFP Schedule**

- The vendor's completed response must be received no later than 5:00pm Central Time, March 25, 2009, at the offices of the Court – Judicial Administrator's Office, 400 Royal Street, Suite 1190, New Orleans, Louisiana 70130 and Schafer Consulting – 9 Red Leaf Lane, Ladera Ranch, California 92694. Late bids will not be accepted. All bids must be signed by an authorized principal of the proposer.
  - Vendor's proposal should be limited to a maximum of 40 pages, with no smaller than a 10 point font.
- Responses to all Appendices sections in this RFP must be completed using the templates provided by the Court – which can be downloaded via a link under the Court News section of the Court's website.
- Vendor responses must be submitted in an original with 12 numbered and bound paper copies to the Court and 2 numbered and bound paper copies to Schafer Consulting. The original must be sent to the Court's address, clearly marked and containing original signatures, and must be easily reproducible on a standard copying machine.
  - In addition, please submit an electronic copy to both the Court and Schafer Consulting of the entire RFP response on CD-ROM utilizing Microsoft Office (e.g. Word, Excel, Schedule), version 2007.
  - Pricing Worksheets and other pricing-related documents must be sent under separate cover, 1 printed and 1 electronic copy on the above mentioned CD-ROM. Appendix B
  - Information must be furnished complete, in compliance with the terms, conditions, provisions and specifications of the Request for Proposals. The information requested and the manners of submission are essential to permit prompt evaluation of all proposals on a fair and uniform basis.
  - the Court reserves the right to declare as non-responsive and reject any proposal in which material information requested is not furnished or where indirect or incomplete answers or information are provided.
  - Proposals and modifications or corrections received after the closing time specified will not be considered.
  - Proposals shall be for the total net price including all applicable taxes, shipping, and charges.
  - All forms and questionnaires must be completed using the electronic versions provided with this RFP.
  - No facsimiles will be accepted. All photocopies must be signed in original ink.

### ***Schedule***

RFP Issue Date	February 11, 2009
----------------	-------------------

Pre-Bid Conference at the Court	March 2, 2009 (10:00 Central Standard Time)
Final Date for Vendors to Request Clarifications to RFP	March 4, 2009
Court Response to Requested RFP Clarifications Published	March 10, 2009
Proposals Due from Participating Vendors	March 25, 2009 (5:00 PM Central Standard Time)
Anticipated Short-List Selection	April 14, 2009
Solution Demonstrations by Short-Listed Vendors (2 to 3 days per short-listed vendor)	May 4 to May 22, 2009
Anticipated Finalist Selection	Early June
Anticipated Project Start Date	October 1, 2009

### Evaluation Method

- The Court will use a committee to evaluate all proposals deemed responsive to this request.
- **Responses** to this RFP will be evaluated and scored according to the following criteria and a Short-List will be selected:

Specifications	Points
Responsiveness of Proposal	5
Company Background and Experience	10
Staffing and Organization	15
Work Plan and Schedule	15
System Functionality and Architecture	35
Cost Proposal	15
Other factors	5

- **Other Factors** – including the vendor's ability/willingness to sign the Court's contract "as is"; the process and methodologies for software maintenance and updates, as well as the vendor's methodology, experience, and infrastructure for providing technical support; and the materials provided in the vendor's appendices, such as training materials, sample implementation timeline, etc.

### RFP Format and Requirements

- The following format should be used to structure your RFP response.

Section	Title	Included as Part of 40-page Count
	Title Page	No
	Letter of Transmittal	Yes
	Table of Contents	Yes
1.0	Executive Summary	Yes
2.0	Company Background and Experience	Yes, except for Financial statements
3.0	Project Understanding	Yes
4.0	Project and Organizational Staffing	Yes
5.0	Project Work Plan and Schedule	Yes, except for schedule / Gantt chart
6.0	System Description and Functionality	Yes, except for Requirements worksheets
7.0	Software Maintenance, Updates, and Support	Yes
8.0	Cost Proposal	No – submitted under separate cover
9.0	Client References	Yes
10.0	Vendor Profile Questionnaire	Yes
11.0	Appendices	No

### Required Forms

#### **APPENDIX A – REQUIREMENTS WORKSHEETS**



Functional  
Requirements Templa

#### **APPENDIX B – PRICING WORKSHEETS**

- Software Pricing Worksheet

- **Service Cost Worksheet**
- **Hourly Rates of Proposed Staff**
- **Proposed Payment Schedule**



LASC\_Cost\_Sheets.x  
lsx

## APPENDIX C – CLIENT REFERENCES



Appendix C\_Client  
Reference Form.doc

## APPENDIX D – VENDOR PROFILE QUESTIONNAIRE



Appendix D\_Vendor  
Profile Questionnaire.

## APPENDIX E – INTERFACE DIAGRAM



Visio-LASC Interface  
Diagram.pdf

## APPENDIX F – NON-DISCLOSURE AGREEMENT



Non-Disclosure  
Agreement. IT.pdf

## **QUESTIONS AND ANSWERS**

1. Does the Court have a set timeframe for the implementation of Phases 1 and 2?

**A:** *No, the Court is open to a schedule that meets the needs of the Court and resources of the vendor.*

2. Would the Court allow the Phases to overlap?

**A:** *No. The Court believes the fiscal year end of June 30 is a better timeframe to convert financials and calendar year end is a better time to convert Payroll. Court staffing limitations may impact the Courts ability to combine the Phases.*

3. Will the Court backfill positions?

**A:** *No, the Court has no authority to backfill positions at this time.*

4. It appears that more weight is being given to HR/Payroll based upon the number of staffing positions in the RFP. Is there a reason for the additional weighting?

**A:** *The Court is not weighting one module more than another. Currently, Payroll and Benefits Administration are managed by the Fiscal Office; therefore, most of the positions in the RFP are percentages of FTE's in the Fiscal Office. Additional staffing may be made available as necessary.*

5. In the Software Maintenance, Updates and Support section of the RFP, the vendor is asked to provide on-going costs for product maintenance and upgrades for a five year period in the pricing response. Does this pricing response need to include a five year schedule for both software and services?

**A:** *Yes, both software and services should be included.*

6. In the RFP, two numbers are found for number of employees. Can you tell us which number is correct?

**A:** *Both numbers are technically correct. The Supreme Court has 231 employees physically working for the Court. The Court however pays judges and some staff members of other courts throughout the State, which brings the number of "employees" paid through the judicial branch to 726.*

7. Can you give us an idea on the number of employees that will be expected to use self-service features?

**A:** *The Court expects all "employees" to have the ability to use the self-service features. The number may be closer to 1,000 given the fact that some Courts of Appeal employees are only accessing HR services and not payroll.*

8. The previous question relates to the number of trainers and training sessions a vendor would need to utilize to support self service training. How can this be accomplished without a specific number?

**A:** *The Court intends to use train the trainer methodology in delivering training to end-users. Due to the number of judges scattered around the State, it would be more*

- feasible to train them at semi-annual meetings which may not coincide with a vendor's schedule.*
9. Based upon the Business Case developed by Schafer Consulting, has the Court reengineered processes and procedures that a vendor would be expected to comply with?
- A:** *No, the Court is looking for Best Practices; therefore we thought it would be in our best interest to re-engineer processes and procedures along with the implementation of the ERP system to make for a better fit with the software.*
10. How is the Court licensed on MS SQL Server 2008?
- A:** *The Court is licensed per server.*
11. How many servers does the Court have?
- A:** *The Court currently has three (3) SQL servers on location and one (1) located in the Disaster Recovery site.*
12. Are the servers located in New Orleans and Baton Rouge?
- A:** *No, the servers are located in New Orleans and the disaster recovery site in North Louisiana.*
13. How are the servers replicated in the disaster recovery site?
- A:** *The servers are mirrored in the disaster recovery site.*
14. Do the Court's employees use any of the State's self servicing features on their SAP system?
- A:** *No, we are a separate branch of government.*
15. What are the components of the "Price not-to-exceed" contract for this procurement?
- A:** *The not-to-exceed price includes all costs, software, staffing, travel and other incidentals. The price should be all inclusive.*
16. What type of contracts does the Court enter into?
- A:** *Contracts include consulting, professional services, hourly, fixed fee and blanket contracts. The Court can enter into all possible contracts.*
17. Will the Court allow the vendor to use training kits or packages that have become popular these days?
- A:** *The Court is open to all vendor proposals for training.*
18. How many union contracts and union employees does the Court have?
- A:** *The Court has no unions or unionized employees.*
19. Has a budget been approved for the project and is it a part of a budget in the Court's financial statements?

**A:** *The Justices have approved funding for this project. No funding has been set aside in the financial statements for this project but funds are readily available.*

20. Has the budget number been published?

**A:** *No, the budget number has not and will not be published.*

21. Will the front and back end of the servers both be MS Server 2008 and SQL Server 2008?

**A:** *The database server is SQL Server 2008, the application/web servers are Windows Server 2008 and all clients are currently Windows XP or Vista.*

22. Is HR looking to capture specific functions or actions in the system?

**A:** *Yes, HR is looking for Applicant Tracking, Leave Management, Personnel Management, Benefits Administration, Position Control and Timekeeping.*

23. What software are you currently using for financials and HR?

**A:** *The Court is currently using Delta Computer Systems, Peachtree and QuickBooks for financials and ABRA for HR.*

24. What is the Court's current account structure (character length)?

**A:** *The current account string is twelve (12) characters. Four (4) for fund number, four (4) for department numbers and four (4) for revenue/expense object code.*

25. How many accounts does the Court currently have?

**A:** *The Court cannot readily provide that number but it is extensive due to system limitations.*

26. How many entities will be involved in the system?

**A:** *Currently we have two (2) companies with the Supreme Court as the roll up or parent account and the Clerk's Office Fee Fund account as a separate entity. The Court is open to a revision of the current structure.*

27. Can employees work for more than one entity?

**A:** *Yes, employees can work for more than one entity but currently we do not have any. Employees can work for multiple funds.*

28. What is the annual budget?

**A:** *Our current budget is \$138.6 million.*

29. What percentage of the budget is purchasing?

**A:** *Purchasing accounts for about 20% of the budget.*