



**ADDENDUM No. 1 TO RFP #07-20, LAWSON HUMAN RESOURCES BUILD-OUT**

Request for Proposals (RFP) Title: Lawson Software Human Resource Modules: Build-out and Consultation

Solicitation Number: RFP #07-20

Addendum Number: 1

Date this Addendum Issued: January 16, 2008

Solicitation Coordinator: Daniel Spero  
Contracts Coordinator  
Purchasing & Contracting Services  
Portland Development Commission  
(503) 823-3291 (office)  
(503) 865-3738 (fax)  
[sperod@pdc.us](mailto:sperod@pdc.us) (email)

---

**GENERAL:**

- This Addendum shall be read in conjunction, and constitutes an integral part, with the above-referenced Request for Proposals (RFP).
- Where inconsistent with the original RFP or any previous Addendum, this Addendum shall govern.
- It is the responsibility of all Proposers to conform to this Addendum.
- Unless specifically changed herein, all other requirements, terms and conditions of the RFP remain in full force and effect and can only be modified in writing.

**PURPOSE OF THIS ADDENDUM:**

The purpose of this Addendum is to clarify points of the above-referenced Request for Proposals raised by potential Proposers (in Part I) as well as amend the Schedule of Events and the travel provisions in the Price Proposal evaluation criterion of the RFP (in Part II).

**PART I: ANSWER TO QUESTIONS ON THE RFP**

**Question 1. Has PDC deployed the LSF9 environment?**

*Answer.* No.

**Question 2. Please confirm exactly what version of the HCM [Human Capital Management] application suite is currently deployed at PDC.**

*Answer.* Version 8.01.1.9

**Question 3. What is the reason behind deployment of Portal being only for HR? Are the Finance and Procurement teams already on Portal and do they already have reasonably optimized processes?**

*Answer.* PDC needs to implement Portal for all Lawson users, not just HR.

**Question 4. What factors were considered while defining this project as stand-alone on application 8.0.3 versus accomplishing these objectives as part of the application 9 upgrade?**

*Answer.* PDC's needs for HR data in the system have accelerated, and cannot wait for the timeline to upgrade to 9.0.

**Question 5. Will the PDC provide truly only 1.0 FTE, or is that the FTE for the PDC Project Manager with additional access to functional / users time? What level of access will the vendor have to key PDC business users and stakeholders?**

*Answer.* PDC is **not** dedicating internal resources for a project manager for this project. The 1.0 FTE PDC will provide for this project is a composite of internal staff resources, including human resources staff, information technologies staff, payroll and accounting staff. It is expected that the selected Contractor will provide a Project Manager for this project and satisfactorily perform the services listed in section II (A) (1) of the RFP. Selected contractor will have access to internal PDC business users and key stakeholders upon reasonable notice. All PDC staff necessary for this project are located onsite at the same location.

**Question 6. Are expenses and travel subject to the NTE limit?**

*Answer.* Yes, travel and other reimbursable expenses are subject to a not to exceed (NTE) limit.

**Question 7. Is the GSA limit for M&IE of \$49 inclusive of rental car and related expenses (e.g. fuel and parking)?**

*Answer.* No, the GSA limit of \$49 does **not** include rental car and related expenses; however, Contractor representatives will be limited to economy or compact-sized rental vehicles, unless Contractors pays the difference for alternate transportation. Reimbursement for fuel and parking will be at cost. Contractor must receive prior written authorization from PDC for all travel and must provide PDC with copies of receipts of all travel expenses for which Contractor will seek reimbursement, except meals. See "RFP Revision, Number 1" in Part II of this Addendum, which amends the language in the second paragraph of Section III (5) "Price Proposal."

**Question 8. In Section II (A) (3) (a) of the Scope of Work in the RFP ("[Contractor shall] lead the team through application blueprint," please clarify the desired results and/or deliverables.**

*Answer.* PDC's intent is that selected Contractor will review and make recommendations to most successfully accomplish the deliverables and project objectives as described in section II (A) (3) of the RFP.

**Question 9. In Section II (A) (3) (c) of the RFP, do each of these business practices already exist and are integrated with Lawson? Or are any of these processes currently not processed within Lawson and/or not practiced at all within the PDC?**

*Answer.*

- i. Job Codes currently exist at PDC; however they are only being used to drive worker's compensation rates in the payroll process. They hold no HR value.
- ii. Position Codes do not exist in Lawson at PDC; employee job titles are currently stored and maintained in Microsoft Excel.
- iii. Supervisor Codes do not exist in Lawson at PDC; they are currently stored and maintained in Microsoft Excel.
- iv. Union Codes do not exist in Lawson at PDC; they are currently stored and maintained in Microsoft Excel. Union dues deductions are currently not required, but will be in the near future.

- v. Salary Structures do not exist in Lawson at PDC; they are currently stored and maintained in Microsoft Excel.
- vi. Some Personnel actions exist; see follow up questions below.
- vii. Dependent Data is limited to domestic partners. All dependent data is stored in our Third party benefits administration system.
- viii. Data Attributes: Currently a large amount of data is changed directly on HR11. We manually enter new hires on this form. PDC wants to require all data entry be done through Personnel Actions.
- ix. Status Codes: PDC has a set of Status codes already, and just needs to add some additional ones to fit our leave types.
- x. Employee Groups currently exist in Lawson at PDC and are utilized for benefits and absence management plans. PDC needs to create new groups based on union status.
- xi. Outside Contractors/Temps are currently stored in a separate Access database.
- xii. Automated rules exist for benefit plans in Lawson at PDC; they need to be reviewed and updated to ensure correct rules and processes are implemented.
- xiii. Grievance tracking does not exist inside or outside the system.
- xiv. EEO reporting is done manually from a report.
- xv. Performance Evaluation Tracking does not exist in Lawson. Our current process for tracking is manual. Review schedule: six (6) months post employee hire date and annually thereafter each July.
- xvi. Some work has been done on OFLA and FMLA tracking, however it was not implemented, and must be reviewed.
- xvii. Manager self service does not exist at this time. Employee self service does not exist either, and would be implemented at a later date with a new project.

**Question 10. Please confirm that employees have job codes only on HR11 currently.**

*Answer.* Job codes are located on HR11 and pa13.1 and pa13.2

**Question 11. The following applies to section II (A) (3) (c) in the RFP:**

**a. Please clarify if this refers to Grade-Range schedules and/or Step-Grade schedules.**

*Answer.* Currently, Grade-Range Schedules, but may change depending on union contract negotiations.

**b. Please provide a list of personnel actions currently being used and a brief description of what they are used for:**

*Answer.*

- FTE Change: pay, FTE, salary, etc.
- Position Change: Change an employee's department
- Rehire: Rehire a former employee
- Salary Change: Change salary
- Status Change: Changes status (i.e. move to leave status)
- Term: Terminate employee
- We have a few other actions which are used to change specific user fields.

- c. **For uploads to HR13, please clarify how this information will be gathered? Ad hoc or is it currently stored somewhere? Also, confirm that is the intent to use Lawson Add-Ins to complete this upload, and if not, provide any preferred technology to be used.**

*Answer.* Add-ins are available for use, data is currently collected and stored in a third party administrator's (TPA) system that handles PDC employee benefits.

- d. **Will any other features for applicants be implemented, or only PA31? (The following is a list of features available for applicants):**

- i. **Job History**
- ii. **Education Information**
- iii. **Skills, Knowledge and Abilities**
- iv. **Military Service**
- v. **Job Requisitions**
- vi. **Interview Tracking**
- vii. **Tests Results**
- viii. **Job Qualifications and Qualified Applicants**

*Answer.* No, not at this time, we use another system for applicant info.

- e. **Are the Benefits modules currently configured for all benefit plans, or will benefit plans need to be built?**

*Answer.* Benefit plans are already built for employee benefits. (But not set up for EE self service, which is not necessary at this time. We currently use a TPA system for benefits enrollment. See above.)

- f. **Is the Absence Management module configured currently for PTO plans?**

*Answer.* We currently have vacation, holiday and sick time configured in absence management. PDC needs to set up FMLA and OFLA tracking.

- g. **Is Employee Self-Service (ESS) already deployed? If not, is it included in this implementation? If ESS is included, what features of ESS will be deployed?**

- i. **Inquire only tasks?**
- ii. **Update tasks?**
- iii. **Career Management?**
- iv. **Benefits Open Enrollment? Life Events?**
- v. **Time Entry?**

*Answer.* ESS has not been deployed, and is expected to be completed in a separate project at a later date.

- h. **Are the Benefits modules currently configured for all benefit plans, or will benefit plans need to be built?**

*Answer.* See above.

- i. **For MSS, will Personnel Actions be implemented?**

*Answer.* No.

**Question 12. Questions regarding training and documentation (section II (A) (4) of the RFP):**

- a. **Does PDC want Proposing firm to lead the training classes or will this be handled by PDC resources?**

*Answer.* Training classes will be led by the contractor selected from this RFP.

- b. **Does PDC have a template for training materials that will be utilized or should selected Contractor provide a template?**

*Answer.* Selected contractor is expected to develop training materials.

- c. **Will PDC develop all materials internally or will selected Contractor assist with the development of training materials?**

*Answer.* Selected contractor is expected to develop training materials.

- d. **If PDC is looking for selected Contractor's assistance with development of materials, what type(s) of materials are required? End User Documentation or End User Training Manuals?**

- i. **An End User Training Manual includes step-by-step instructions for completing a particular process (such as adding a one time deduction) and hands on exercises for users to practice adding one time deductions.**
- ii. **End User Documentation includes step-by-step instructions for completing a particular process (such as adding a one time deduction).**

*Answer.* PDC intends that the selected Contractor will provide End User Documentation, as described above, but **not** an End User Manual.

**Question 13. Please confirm that the 25 Add-In reports to be developed are all of approximately "Simple" to "Medium" complexity, acknowledging that the product has significant limitations and some reports are not able to be developed using the Add-Ins product.**

*Answer.* Yes, these are simple to medium complexity, basic employee data reports. HR Report Writer is another tool that would be available for use.

## **PART 2: CHANGES TO RFP #07-19**

By way of this Addendum, the following sections of RFP #07-19 are deleted and replaced in their entirety with the following:

### ***RFP Revision, Number 1.***

*The second paragraph under "Price Proposal" on page 9 is deleted per this Addendum and replaced in its entirety with the following:*

If travel will be required to complete services on a contract awarded from this solicitation, provide a summary of such travel. The summary should include destination(s), names and titles of staff traveling, travel days plus days onsite, cost per staff and total travel cost. Contractor will bear all travel expenses in excess of the total proposed travel cost. PDC will reimburse Contractor's travel expenses only when the travel is essential to the normal discharge of Contractor's obligations on an awarded contract. Contractor shall conduct all travel in the most cost-efficient and cost-effective manner, resulting in the best value to PDC. Contractor must receive prior written authorization for all travel and Contractor shall provide PDC with copies of receipts for all travel expenses for which it seeks reimbursement, except meals.

- Airfare shall be calculated at the most cost-efficient round-trip coach rate;
- Contractor representatives will be limited to economy or compact-sized rented vehicles;
- Hotel stay shall be at moderate standard room rate;
- Meals and incidental expenses shall be calculated using the current [GSA per diem rate](#) for (Portland, Oregon of \$49 per day as of January 2008).

**RFP Revision, Number 2.**

The "Schedule of Solicitation and Contract Award Events" listed on Page 2 of the RFP is deleted and replaced in its entirety with the following. **[Changes in BOLD.]**

---

**SCHEDULE OF SOLICITATION AND CONTRACT AWARD EVENTS**

---

*The following dates are for reference only; PDC may change these dates at our sole discretion.*

Request for Proposals Issued	December 28, 2007
Deadline for Proposer Questions/Requests for Change(s)	<b>January 21, 2008</b>
Deadline for PDC to Respond to Proposer Questions/Change(s)	<b>January 25, 2008</b>
Proposals Due	<b>Wednesday, February 6, 2008 3:00 PM (PST)</b>
Evaluation Period, Ending ( <i>tentative</i> )	<b>February 15, 2008</b>
Anticipated Notice of Intent to Award ( <i>tentative</i> ):	<b>February 15, 2008</b>
Deadline for Protest of Intent to Award	Seven (7) calendar days after Notice of Intent to Award
Anticipated Date of Contract Execution ( <i>tentative</i> )	<b>March 7, 2008</b>

**RFP Revision, Number 3.**

The two other references to the Proposal Due Date: 1) on the cover page and 2) under "Request for Proposals (RFP) Information" on page one, are hereby made consistent with the revised Proposal Due Date listed in the amended "Schedule of Solicitation and Contract Award Events," in RFP Revision, Number 2, above: **Wednesday, February 6, 2008 at 3:00 PM (PST).**

**END OF THIS ADDENDUM**