

Justin S. Greene
Commissioner, District 1

Lisa Cacari Stone
Commissioner, District 2

Camilla Bustamante
Commissioner, District 3



Adam Fulton Johnson
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Gregory S. Shaffer
County Manager

August 22, 2025

SANTA FE COUNTY
RFP No. 2025-0370-CMO
Acquisition and Implementation of Enterprise Resource Planning System

ADDENDUM NO. 2

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

Attachment A– Pre-proposal Conference Agenda
Attachment B – Pre-proposal Conference Sign-in Sheet
Attachment C – Pre-proposal Conference Recording

THE DEADLINE TO SUBMIT PROPOSALS HAS BEEN EXTENDED TO 2:00PM MONDAY, SEPTEMBER 22, 2025

FOR RESPONSE TO QUESTIONS RECEIVED SEE EXHIBIT A

Please add this Addendum No. 2 to the original proposal documents and refer to the proposal documents, as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if originally issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to Bill Taylor, Procurement Manager at wtaylor@santafecountynm.gov



PRE PROPOSAL CONFERENCE
RFP NO. 2025-0370-CMO
Acquisition and Implementation of an Enterprise Resource Planning System (ERP)
August 5, 2025, 2:00pm

Contracting Agency: Santa Fe County

- | | | |
|--------------------|-----------------------|---------------------------|
| • Bill Taylor | Procurement Manager | Purchasing Division |
| • Elias Bernardino | Deputy County Manager | County Manager Department |

Consulting Agency: Avero Advisors

- | | | |
|-----------------|-------------------------|----------------|
| • Cary Tapscott | Client Success Director | Avero Advisors |
| • Simeon Ivanov | Senior Project Manager | Avero Advisors |
| • Vince Gong | Associate Consultant | Avero Advisors |
| • David Buchan | Project Manager | Avero Advisors |
| • Mark Sellers | Associate Consultant | Avero Advisors |

Project Information

The purpose of the Request for Proposal (RFP) is to identify a vendor who can deliver a robust Enterprise Resource Planning (ERP) system as the foundation of an integrated enterprise software suite. The solution must encompass core ERP modules, complementary software, training, hardware (as needed), and comprehensive support through Go-Live.

The County is seeking a primary enterprise system that offers a suite of integrated solutions as outlined in this RFP. The components included in the Scope of Work are as follows:

- **Comprehensive System**
 - Accounts Payable
 - Accounts Receivable
 - Budget Creation
 - Budget Tracking
 - Fixed Assets
 - Financial Reporting
 - Grants Management
 - General Accounting
 - Payroll
 - Timekeeping
 - Contract Management
 - Procurement Process (Purchase Order and Requisition)
 - Recruitment, Onboarding & Offboarding
 - Compensation, Position, & Job Class Maintenance
 - Leave & Benefits Administration
 - Risk Management
 - Learning Management
 - Revenue Collection
 - Asset/Inventory Management
 - Utility Billing

Proposal Information

- Carefully read and understand the Request for Proposal for requirements, terms & conditions including the sample contract.

- Sequence of Events are listed in Section III Conditions Governing the Procurement on page 17 of the RFP.
- Response Format and Organization is listed in Section IV, page 29 of the RFP. - Proposals should be organized as outlined in Section IV, C) Proposal Format, beginning on page 29 of the RFP.
- Selection of finalist(s) will be based on the responses received to the Specifications Section V and the Evaluation Criteria beginning on page 41 of the RFP. The most qualified proposals received based on the evaluation criteria will be evaluated, scored and short-listed by the evaluation committee.
- Cost Proposal – please submit in a separate file in **Dropbox** and if submitting additional paper copies, provide it in a separate sealed envelope with the original proposal ONLY (do not include in each of the eight additional copies, if submitting electronically. Offeror shall propose its cost for the tasks listed in the scope of work. A sample cost sheet is provided as **Appendix G**. Please refer to the County Website www.santafecountynm.gov/services/currentsoliciations to access the Microsoft Excel version of the Cost Proposal template (**Attachment 1**) referenced in **Appendix G**.
- Preferences -
 - 1) N.M. In-State Business Preference Certificate 80 points total of all evaluation factors added to score.

OR

 - 2) N.M. Resident Veterans Preference Certificate, 100 points total of all evaluation factors added to score. For more information on State Preference visit www.tax.newmexico.gov

AND

 - 3) Santa Fe County Preference, 50 points total of all evaluation factors added to score. For more information on County Preference visit <https://www.santafecountynm.gov/finance/purchasing-division>
- Please submit all questions via email to Bill Taylor at wtaylor@santafecountynm.gov, Vince Gong at vgong@averoadvisors.com, and Mark Sellers at msellers@averoadvisors.com. The last day for questions will be close of business **Friday, August 8, 2025**. (*Any contact with any other County staff member or persons other than the Procurement Manager may be grounds for disqualification.*)
- Addendum will be issued by close of business **Friday August 15, 2025**. (*Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.*)
 - Proposal Submittal – **Due Date: Monday, September 8, 2025, Time: 2:00 PM (MST)**
Location: Santa Fe County Purchasing Division, 102 Grant Avenue 1st Floor, Santa Fe, N.M. 87501

Electronic submission of proposals is preferred and is available via Dropbox utilizing Dropbox link. Please copy and paste in browser:
<https://www.dropbox.com/request/2fFc9uzuemEU3Vp1FDX5>

Attachment B

Meeting title:Pre-Proposal RFP No. 2025-0370-CMO ERP		
Name	Email	Role
Amanda Patterson-Sanchez	apatterson-sanchez@santafecountynm.gov	Organizer
Bill Taylor	wtaylor@santafecountynm.gov	Presenter
Simeon Ivanov	sivanov@santafecountynm.gov	Presenter
Simeon's Fathom Notetaker (Unverified)		Presenter
19549141433 (Unverified)		Attendee
12246167440 (Unverified)		Attendee
19186881666 (Unverified)		Attendee
Vince Gong (External)	vgong@Averoadvisors.com	Presenter
David Buchan	dbuchan@santafecountynm.gov	Presenter
Vince's Fathom Notetaker (Unverified)		Presenter
12156803507 (Unverified)		Attendee
Mark Sellers (External)	msellers@Averoadvisors.com	Presenter
Mark's Fathom Notetaker (Unverified)		Presenter
19704435140 (Unverified)		Attendee
Yvonne S. Herrera	ysherrera@santafecountynm.gov	Presenter
17134163280 (Unverified)		Attendee
Elias Bernardino	ebernardino@santafecountynm.gov	Presenter
Tapscott, Cary (Avero)	n-Cary.Tapscott@portofportland.com	Presenter
12066691473 (Unverified)		Attendee
14352325516 (Unverified)		Attendee
17209844153 (Unverified)		Attendee
19028305816 (Unverified)		Attendee
17573437450 (Unverified)		Attendee
15127311739 (Unverified)		Attendee
17204007469 (Unverified)		Attendee
14806008368 (Unverified)		Attendee
14079203308 (Unverified)		Attendee
17046618662 (Unverified)		Attendee
Vince's Fathom Notetaker (Unverified)		Presenter
Mark's Fathom Notetaker (Unverified)		Presenter
Simeon's Fathom Notetaker (Unverified)		Presenter
16173047632 (Unverified)		Attendee
12486138570 (Unverified)		Attendee
13039176472 (Unverified)		Attendee
19497422482 (Unverified)		Attendee
13022906929 (Unverified)		Attendee
16893006458 (Unverified)		Attendee
14046949648 (Unverified)		Attendee
12087036920 (Unverified)		Attendee
18133174840 (Unverified)		Attendee
17013309079 (Unverified)		Attendee

18013605436 (Unverified)		Attendee
18155490225 (Unverified)		Attendee
16788878850 (Unverified)		Attendee
19025181990 (Unverified)		Attendee
17343085683 (Unverified)		Attendee
16514923740 (Unverified)		Attendee
15059200843 (Unverified)		Attendee
13038272746 (Unverified)		Attendee
18594922829 (Unverified)		Attendee
18045723126 (Unverified)		Attendee
Carolyn Terry (External)	CTerry@denovo-us.com	Presenter
Goldsmith, Stephen (External)	SGoldsmith@smxtech.com	Presenter
Kory Hayes	kory.hayes@stradaglobal.com	Presenter
Dan Cavanaugh (External)	dan.cavanaugh@infor.com	Presenter
Dave Stephens (External)	Dave.Stephens@highstreetit.com	Presenter
Greg Simmons	greg.simmons@appsassociates.com	Presenter
Sanchez, Judy (External)	judy.sanchez@sap.com	Presenter
Keith Cressman		Presenter
Eric Heaps		Presenter
Jenna Hofmann (External)	jenna.hofmann@canamtechnologies.com	Presenter
Doug Gardner - SpryPoint (Unverified)		Presenter
Arpit Shastri	Arpit.Shastri@TechMahindra.com	Presenter
Adam Sexton - Oracle (Unverified)		Presenter
Jack Gebhard (External)	jack.gebhard@genesisconsulting.com	Presenter
Christian Tyler (External)	ctyler@collaborativesolutions.com	Presenter
16102384576 (Unverified)		Attendee
Lindsey Owen	lindsey.owen@stradaglobal.com	Presenter
Missy Jones (NEOGOV) (Unverified)		Presenter
Jodi Hartz (External)	jodi.hartz@centralsquare.com	Presenter
McCambridge, Maddie (External)	Maddie.McCambridge@tylertech.com	Presenter
Laura Mowry Workday (Unverified)		Presenter
OM Vilas Dixit	Om.Dixit@TechMahindra.com	Presenter
Youngwirth, Mike (External)	Mike.Youngwirth@sierra-cedar.com	Presenter
Eric Heaps	eric.heaps@workday.com	Presenter
Derek Johnson (External)	derek.johnson@genesisconsulting.com	Presenter
16102238269 (Unverified)		Attendee

Attachment C

Pre-proposal RFP No. 2025-0370-CMO Recording

[Pre-Proposal RFP No. 2025-0370-CMO ERP | Meeting Chat | Microsoft Teams](#)