

Henry Roybal
Commissioner, District 1

Anna Hansen
Commissioner, District 2

Rudy N. Garcia
Commissioner, District 3



Anna T. Hamilton
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Gregory S. Shaffer
County Manager

August 4, 2022

SANTA FE COUNTY
RFP No. 2022-0261-CMO/APS
STRATEGIC PLAN MANAGEMENT SOFTWARE

ADDENDUM NO. 1

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 RFF as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

Attachment A: Revised Evaluation Criteria #5

Attachment B: Pre-Proposal Agenda and Sign-In Sheet

Question No. 1: Do we need to fill out Appendix E?

Answer No. 1: The Sample Agreement is for your information to review the County's terms and conditions.

Question No. 2: How many users does the County anticipate will need access to the PMIS?

- **What are the roles/groups of these users?**
- **In the meeting it was mentioned that the County would like at least one person from each department/division to have access, how many departments/divisions are there? What do they each do?**

Answer No. 2: We have not yet determined how many users we will need and would like to have the option to grow without accruing more cost. Unlimited users would be ideal. The roles of users will be department and division directors and managers who will use the system to collect and analyze data, run reports, and monitor progress on goals and projects.

Santa Fe County is comprised of five departments: Public Works, Public Safety, Community Services, Community Development, and Growth Management. In addition, there are five offices of elected officials: Assessor, County Clerk, Treasurer, Sheriff, and Probate Judge.

Policies and priorities are set by an elected Board of County Commissioners and operations are managed the County Manager and the Office of the County Manager.

The divisions within the departments and complete descriptions are available on our website, www.santafecountynm.gov/departments. Please note that we do not want to be limited to 1 or 2 users from each department.

Question No. 3: Under the Evaluation Criteria, #5 Past Performance. Can you clarify if we are supposed to provide client references that are different from the contracts in the first bullet point, or can they be the same?

Answer No. 3: Please see Attachment A, revised Evaluation Criteria #5.

Question No. 4: Scope of Work item 10.C mentions stand-alone project tracking. Does this mean that you would like to track projects that are not directly related to your strategic plan?

Answer No. 4: Yes, most projects will be linked to the strategic plan or departments' operational plans, but we would like to have the option for a stand-alone project if it were to arise.

Questions No. 5: Scope of Work item 10.E mentions visualization for mapping of projects. By this do you mean geospatial visualizations such ArcGIS?

Answer No. 5: No, I would like data visualization (charts, graphs, etc.) that illustrate the hierarchy and relationships that exist in the strategic plan.

Question No. 6: Integrations – How will this system interact with the project management information system (PMIS)? What data or information will be transferred between the system?

- **SharePoint – Describe the processes and information that will be supported by SharePoint and the expectation to interact/integrate with the PMIS? For example: files will continue to be stored on the client's SharePoint site and the PMIS will need to link to these files. Or, are there additional workflow processes and data that will be required to integrate with the PMWeb?**
- **County Website – What are the integration requirements between the systems? PMIS links to the County website from the user's home page or are there additional workflow processes and data that will be required to integrate with the PMIS?**
- **Data Migration – Assumption is no data will be migrated and no services included in the cost estimate. If the County plans on migrating data, how many years of historical data will be need to migrate? What are their files types?**

Answer No. 6: The system will not interact with PMIS. Data from the current strategic plan will be imported by the awarded vendor.

Question No 7: Will the County need Asset Management?

Answer No. 7: No.

Question No. 8: Can the County expound on specific functionality it is looking for?

- **In the meeting Cindy mentioned the County has defined measurable for their 5 Population goals, is the County able to share those defined measurable? We believe it could provide further insight to how the County will use the PMIS and allow us to extrapolate the functionality sought.**

Answer No. 8: Please refer to the strategic plan on the County's website for an example of performance measurable.

Question No. 9: Can the County clarify what it means, on page 21 under Section 2. Professional Competence and Specialized Experience, specific "technical experience" with providing services comparable to the Scope of Work required in the RFP? Is the County looking to see our Implementation experience or PMIS functionality & capabilities?

Answer No. 9: The County is asking for a response to your competence and experience with plan management software systems that are similar to land development or other types of plan management systems.

Question No. 10: Can you provide an example of a plan that is currently utilized?

Answer No. 10: A copy of the 2019 Strategic Plan spreadsheet is available on the website. (<https://www.santafecountynm.gov/media/files/Finance/Strategic%20Plan%20Reports/Copy%20of%20Strategic%20Plan%20FY2019Q2%20Performance%20Report%2002.07.19.pdf>)

While the plan has been updated and is currently being revised, this is a good example of the kind of plan we are using now.

Question No. 11: What else did you manage as part of plan management activities?

Answer No. 11: This will be discussed with the awarded vendor.

Question No. 12: Besides collaboration, what other pain points did you experience?

Answer No. 12: This will be discussed with the awarded vendor.

Question No. 13: What system(s) are currently used by staff to manage work?

Answer No. 13: The Santa Fe County Strategic Plan is currently managed on an Excel spreadsheet.

Question No. 14: Do you do any other type of planning - such as capacity planning?

Answer No. 14: Not at this time.

Question No. 15: Is there a specific file naming convention you want the proposals submitted as if submitted through Dropbox?

Answer No. 15: There is no specific file naming convention. The response and cost proposal need to be submitted as different files.

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, hereto as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original 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 Amanda Patterson-Sanchez, Procurement Specialist Senior at apatterson-sanchez@santafecountynm.gov.

Attachment A

Revised Evaluation Criteria #5

5. Past Performance

- Provide descriptions of current or past contracts with similar services being provide by your firm, including: a) name of the individual or company; b) address of individual or company; c) name of contact person; d) telephone number and e-mail address of contact person; and e) type of services provided and service dates.
- Describe contracts and other agreements with government agencies or private industry where offeror demonstrated control of costs, performed quality work and demonstrated ability to meet schedules and deadlines.
- Describe any particular difficulties confronted in past projects and how the offeror addressed and resolved the issues.

Attachment B



**PRE-PROPOSAL CONFERENCE
STRATEGIC PLAN MANAGEMENT SOFTWARE
RFP NO. 2022-0261-CMO/APS
JULY 27, 2022 AT 10:00AM**

Contracting Agency: Santa Fe County

- Amanda Patterson-Sanchez Procurement Specialist Senior Purchasing Division
- Bill Taylor Procurement Manager Purchasing Division
- Cindy McKee Strategic and Operational Planning Director County Manager Office

Project Information

- Santa Fe County Manager Office is requesting proposals from firms/companies to provide an off the shelf, cloud-based plan management software system or data, plan and project management system.
- **Request for Proposals (RFP) Documents:** The RFP documents are available by contacting Amanda Patterson-Sanchez at apatterson-sanchez@santafecountynm.gov or visiting the Santa Fe County's website at https://www.santafecountynm.gov/asd/current_bid_solicitations.

Proposal Information

- Carefully read the Request for Proposals for requirements, terms and conditions including the sample agreement.
- Sequence of Events are listed on page 9.
- Proposal Organization – Proposal should be organized as outlined in the RFP on pages 19 and 20.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 21-24) will be scored by a three to four-member evaluation committee.
- Preferences –
 1. N.M. In-State Business Preference Certificate, 50 points total of all evaluation factors added to score.

OR

Attachment B

2. N.M. Resident Veterans Preference Certificate, 100 points total of all evaluation factors added to score. For more information on State Preference visits <https://www.tax.newmexico.gov/>

AND

3. Santa Fe County Preference Certificate, 50 points 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 Amanda Patterson-Sanchez at apattersonsanchez@santafecountynm.gov. The last day for questions will be **Friday, July 29, 2022**. (Please do not contact any other County staff).
 - Addendum will be issued on **Tuesday, August 2, 2022**. (*Only question answered by formal written addendum will be binding. Oral and other interpretations or clarifications will be without legal effect*).
 - Proposal Submittal –
Due Date: Thursday, August 18, 2022
Time: 2:00PM
Location: 102 Grant Avenue 1st Floor, Santa Fe, NM
Electronic submission also available via Dropbox utilizing
Dropbox link:
<https://www.dropbox.com/request/dWuPPVDqMbgxs3Qc8Woh>

QUESTIONS?



SANTA FE COUNTY

PRE-PROPOSAL CONFERENCE

RFP No. 2022-0261-CMO/APS

STRATEGIC PLAN MANAGEMENT SOFTWARE

JULY 27, 2022 AT 10:00AM

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
Amanda Patterson-Sanchez	SFC Purchasing	(505) 992-6753	apatterson-sanchez@santafecountynm.gov
Cindy McKee	SFC Managers		
Bill Taylor	SFC Purchasing		
Dominic Trujillo	SFC Purchasing		
Sam Nadarajan	Kunz, Leigh & Associates		
Amanda Cyr	State and Local Government Market		
Sebastian Lopez	PMWeb, Inc.		
Jess Charette	Raftelis		
Shannon Ledwith	ClearPoint		
Mark Kachmar	Envisio		