

# **Garland Independent School District**

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**Enterprise Resource Planning Software and Services**

**Request for Proposals (RFP)**

**April 2025**

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## **GENERAL TERMS AND CONDITIONS**

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# 1 GENERAL REQUIREMENTS

## 1.1 OVERVIEW

Garland Independent School District, located in Garland, TX, serves over 51,000 students in 68 schools across the communities of Garland, Rowlett, and Sachse. Garland ISD (hereinafter referred to as “GISD”, or the “District”) is seeking to replace its current Enterprise Resource Planning (ERP) solution. The District is currently using Oracle’s E-Business Suite (EBS), which is hosted onsite by the District.

The District is seeking proposals for a comprehensive, cloud and subscription-based (SaaS) ERP solution—whether suite-based, best-of-breed, or a hybrid approach—that integrates Finance, Procurement, and Human Capital Management (HCM), ensuring scalability, compliance, and seamless interoperability with existing and future systems.

The District has a requirement to go live on all functionality included in this RFP on **July 1, 2026**, vendors are to provide proposals that are compliant with this timeline. In the interest of risk mitigation, GISD is also interested in understanding alternative approaches to the implementation. Vendors are also required to provide proposals that detail their best practice for phasing and timing for the implementation based on the scope of the project and the size and complexity of the District articulated in this RFP.

## 1.2 INTENT

It is the intent of GISD to solicit proposals from qualified vendors for an ERP solution and related services. Vendors may partner with another provider to supply a complete and turnkey solution; however, it should be noted that the District has a strong preference for a solution provided by a single vendor. If your response contains proposed products and/or services from multiple providers, all responding parties must be clearly identified and a synopsis of the partner relationship, as well as the party that will serve as the prime vendor/contact for the District, must be detailed. The District reserves the right to “unbundle” the responses and proceed with the provider(s) deemed most suitable.

## 1.3 SCHEDULE OF EVENTS

EVENT	DATE
Request for proposal (RFP) released	April 4, 2025
Vendor pre-bid conference call	April 17, 2025 at 1p CST
Deadline for submittals of questions related to this RFP	April 25, 2025 at 12p CST Cecilia Ramirez, Senior Buyer <a href="mailto:Cramire@garlandisd.net">Cramire@garlandisd.net</a> & <a href="mailto:Bids@garlandisd.net">Bids@garlandisd.net</a>
Addendum Date	May 2, 2025
Deadline for proposal submittal	May 16, 2025 at 1p CST
Vendor demonstration and interviews	July 28, 2025 through August 8, 2025
Identification of selected vendor	Week of August 25, 2025

EVENT	DATE
Contract Negotiations	September and October 2025
Anticipated Vendor Award	December 2025
Implementation Go-Live Dates	All Functionality – July 1, 2026  *Vendors are also to provide alternative timelines based on their best practice.

## 1.4 PROPOSAL SUBMISSION

Proposals shall be submitted by the deadline indicated in **Section 1.3, Schedule of Events** Late Submissions - Proposals received at the GISD Purchasing Department after the time and date specified above will not be considered and will be filed unopened. The Garland ISD shall not be held liable for late proposals.

### 1.4.1 Delivery Of Proposal



Hand-carried proposals or proposals submitted via carrier service are to be delivered to:

**Garland ISD Purchasing Department**

501 S. Jupiter, Garland, Texas 75042

Proposals submitted via the U. S. Postal Service are to be mailed to:

**Garland ISD Purchasing Department**

P. O. Box 469026, Garland, Texas 75046-9026

Clearly mark all Proposal envelopes as instructed below. Allow sufficient transit time.

**PLEASE SUBMIT PROPOSAL NO LATER THAN 12:00 P.M. CST ON May 12, 2025. Mark the sealed return envelope in the lower left hand corner with PROPOSAL#, time, and due date, as noted above. (Should the district close for unforeseen reasons (force majeure) on the date the solicitation is due, the above referenced date should be changed to 12:00 P.M. CST on the first date the district is open to conduct business).**

**NOTE: Delivery of Proposal envelope to other Departments within the Garland Independent School District is not considered as delivery to the Purchasing Department.** Electronic proposal submissions must include the following files:

- Printed Hardcopy accompanied by an electronic proposal in searchable PDF format
- **Appendix A** in Excel format, including all required forms:

- Compliance Form
- Certification for Criminal History Check
- Confidential Information Declaration & Copyright Authorization Form
- Insurance Requirements
- **Appendix B** in Excel format
- Printed, signed, and scanned copies of all forms and signature pages (may be combined into a single PDF)

All proposals **MUST** include the vendor response forms provided in **Appendix A**.

All proposals must be recorded on the proposal response sheets provided in this RFP document; supplemental line-item pricing information should be provided and referenced on the response sheets.

Proposals shall be accompanied by a sworn and notarized statement disclosing any familial relationship that exists between the Vendor or any employee of the Vendor and any member of the Board of Education or superintendent. The District shall not accept a proposal that does not include this sworn and notarized disclosure statement. The Non-Familial Form must accompany your bid proposal (see **Appendix A**).

#### 1.4.2 Format for Pricing

Proposals written in pencil will not be accepted. Changes may be crossed through and corrections inserted adjacent and initiated by the person preparing the Proposal. Should errors in multiplication or addition of a unit price against a total price occur, the unit price shall govern. All pricing proposed for products and/or services shall constitute entire consideration due.

The section in sourcing “Note to Buyer” is informational only. It will not govern the unit price or amend the format for pricing. The Compliance Form should be utilized for any deviations on unit price or packaging size.

### 1.5 INTENT TO PROPOSE

Each vendor that intends to submit a proposal in response to this RFP should communicate its intent via email to [gina.mancinelli@plantemorran.com](mailto:gina.mancinelli@plantemorran.com) and [bids@garlandisd.net](mailto:bids@garlandisd.net) with the subject line “*[insert your vendor name]*– Garland ISD ERP Software and Services RFP - Intent to Propose.” Please refer to **Section 1.7, RFP Clarifications and Addenda**, for the contact information to address specific questions related to this RFP.

The response shall include the name of the Vendor, the name of the contact person, and that person’s email address.

### 1.6 VENDOR’S PRE-BID CONFERENCE CALL

Prospective vendors are strongly encouraged to attend a pre-bid conference call that is scheduled as indicated in **Section 1.3, Schedule of Events**. In advance of the meeting, vendors should notify the contact listed in **Section 1.7, RFP Clarifications & Addenda**, indicating intent to attend. Additionally, vendors are strongly encouraged to submit questions prior to this call.

The pre-bid conference call will be conducted via web conference at the date and time indicated in Section 1.3. Vendors may join the conference via the following link:

[MICROSOFT TEAMS CONFERENCE](#)

## 1.7 RFP CLARIFICATIONS AND ADDENDA

Please note that any addenda will be posted by the District to the bid site that housed the original RFP. Vendors are responsible for checking the site regularly to make themselves aware of any new addenda. When making requests for clarification, please identify the relevant section number (e.g., Section 2.3.1).

Requests for clarification shall be submitted by email only to:

Cecilia Ramirez, Senior Buyer  
[Cramire@garlandisd.net](mailto:Cramire@garlandisd.net)  
[Bids@garlandisd.net](mailto:Bids@garlandisd.net)

## 1.8 PROPOSAL FORMAT

To facilitate the comparison of vendor proposals, it is required that each proposal be organized into the following sections:

### 1.8.1 Executive Summary

The executive summary should at a minimum include the following: an executive letter highlighting how the proposed solution achieves the objectives of the District.

- A. Include a certification statement confirming that your proposed solution meets all applicable minimum requirements, as outlined in the Minimum Requirements section of this RFP. Any proposal that fails to meet one or more of the minimum requirements will be automatically disqualified from further consideration.
- B. This letter is to be signed by an officer of the organization submitting the proposal.

### 1.8.2 Organizational Overview

- A. Organizational overview
  1. Company background and local branch organization support
  2. Description of application software, including points of integration between modules. This is to include a comprehensive application architecture diagram that includes core software, third-party/ancillary solutions and all integrations between modules/systems.
  3. Implementation plan (including timeline)
  4. Data migration plan and approach
  5. Training plan

6. Testing plan
  7. System documentation
  8. Staffing plan
  9. Ongoing support and maintenance
  10. System performance
  11. List of all integrations between proposed system and other K-12 administrative systems in use at the District
  12. Application development roadmap
  13. Technical architecture roadmap
  14. Current architecture diagram
  15. Hardware and technical overview
    - a. Description of computers and other equipment, including network topology and components (where applicable)
    - b. Technical requirements, including a list of browsers supported, plug-ins, version numbers, and any client software required
- B. Full Texas K-12 client list
- C. Vendor response forms
1. In addition to the information requested on your company in **Appendix A**, you must clearly indicate whether you either comply or take exception to any of the sections in this RFP. All vendors **MUST** submit the form **Comply/Exception Form** from **Appendix A (including all required forms)**.
  2. Vendors must complete both pricing forms in **Appendix A**:
    - a. **Pricing Form – Base**: Proposal to support a July 1, 2026 go-live for all functionality
    - b. **Pricing Form – Alt**: Proposal based on the vendors best practice approach to phasing and timing based on the information in this RFP.
  3. Responses to all application software requirements (**Appendix B**) must be provided. Specific statements concerning those areas where the proposal differs from the specifications should be presented. Software modification costs required should be estimated in the vendor response forms in the appendices.
  4. Completed Pricing Forms, found in **Appendix A**, must be provided.

### 1.8.3 Project Plan

The Vendor will include in their response an overview of their project plan, including anticipated hours for the project, significant milestones, a communication plan, and change management process (including charges for hours above and beyond those outlined in the original plan).



#### **1.8.4 Project Team**

Indicate the level of qualification of the staff that will be assigned to this project. Qualification will be based on certifications and years of experience with the materials proposal in similar configurations. Names of staff need not be provided; however, the response in this section will indicate the minimum level of experience that will be provided. If necessary, please include additional categories to address additional levels of staff or staff with different certifications and years of experience.

#### **1.8.5 Product Information**

The Vendor must include hard copies of the technical specifications/data sheets for each of the products being proposed.

#### **1.8.6 Additional Information**

Additional information may be provided at the Vendor's discretion.

### **1.9 MODIFICATION OF RFP**

Vendors may not modify the RFP text to affect the terms, conditions, or specifications found in this document; this is forbidden and will subject the bid response to rejection. In the event any text is modified, the original text, as issued, will apply. This clause does not apply to the vendor response areas of the RFP where it is expected that vendors will enter their text.

### **1.10 CONFIDENTIAL INFORMATION**

As a public entity, the District is subject to the Freedom of Information Act (FOIA). Information contained in proposals may be subject to FOIA requests.

### **1.11 RIGHT TO REQUEST ADDITIONAL INFORMATION**

The District reserves the right to request any additional information that might be deemed necessary after the completion of this document.

### **1.12 RIGHT OF REFUSAL**

The District reserves the right to reject any or all proposals in their entirety, evaluate suggestions or exceptions, waive irregularities, or select certain equipment from various vendor proposals, based on the best interests of the District. The District reserves the right to reject any or all proposals for a specific section. The District reserves the right to award specific buildings to one or more vendors.

### **1.13 PROPOSAL PREPARATION COSTS**

The Vendor is responsible for any and all costs incurred by the Vendor or its subcontractors in responding to this RFP.

## 1.14 SYSTEM DESIGN COSTS

The successful vendor shall be responsible for all design, information gathering, and required programming to achieve a successful implementation. This cost must be included in the base bid.

## 1.15 PRICING ELIGIBILITY PERIOD

All vendor proposals are required to be offered for a term not less than **180** calendar days in duration. Should errors in multiplication or addition of a unit price against a total price occur, the unit price shall govern. All pricing proposed for products and/or services shall constitute entire consideration due.

## 1.16 CONTRACT PERIOD

The contract award resulting from this RFP shall be for a seven-year period. The District reserves the right to modify the contract term based on the final solution.

## 1.17 ADDITIONAL CHARGES

No additional charges, other than those listed on the price breakdown sheets, shall be made. Prices quoted will include verification and coordination of order, all costs for shipping, delivery to all sites, unpacking, setup, installation, operation, testing, cleanup, and training.

## 1.18 TURNKEY SOLUTION

All prices quoted must include all the software, services, related hardware, etc., that will be necessary to make the system specified fully operational for the intent, function, and purposes stated herein. ALL hardware and prerequisite software for the appropriately sized server environment proposed must be proposed; no assumption should be made as to existing licenses within the local district network environment.

## 1.19 FEDERAL OR STATE SALES, EXCISE, OR USE TAXES

GISD is a tax-exempt entity for all purposes except if the project makes enhancements and/or additions to real property.

## 1.20 CONTRACT REQUIREMENTS

The District considers this RFP legally binding and will require that this RFP and the resulting vendor proposal be included as addenda to any subsequent contracts between the Vendor(s) and the District. It should be understood by the Vendor(s) that this means the District expects the Vendor(s) to satisfy substantially all requirements and reports listed herein. Exceptions should be explicitly noted in the vendor proposals. **Lack of exceptions explicitly noted in the Vendor's proposal will be considered acceptance of all of the specifications as presented in this RFP.**

Minimally, the Agreement must contain the following language and respective components:

### **1.20.1 Identification of parties to the Agreement clause**

Both the Vendor and the District shall be clearly identified by name. Neither of the identified parties to the Agreement shall assign or encumber any of its rights, or delegate or subcontract any of its duties defined in the Agreement, in whole or in part, to other third parties unless the other party to the Agreement gives prior written consent. Subject to the foregoing covenant against assignment and delegation, the rights created by the Agreement shall pass to the benefit of the identified party and the duties and obligations resulting from the Agreement shall bind the identified party and their respective successors and assignees.

### **1.20.2 Entire Agreement clause**

The Agreement, including appendices and referenced attachments, constitutes the entire agreement between the District and the Vendor and supersedes all proposals, presentations, representations, and communications, whether oral or in writing, between the parties on this subject.

### **1.20.3 Agreement extension and modification clause**

The Agreement may be modified or extended in accordance with the following procedures. In the event that all parties to the Agreement agree that such changes would be of a minor and nonmaterial nature, such changes may be affected by a written statement that describes the situation and is signed, prior to the effectiveness, by all parties. In the event that the changes are determined by either or all parties to the Agreement to be of a major or complex nature, then the change shall be by formal amendment of the Agreement signed by the parties and made a permanent part of the Agreement.

### **1.20.4 Term of the Agreement clause**

The term of all licenses and support agreements shall be clearly identified in the Agreement, but shall not be for less than one year from the effective date.

### **1.20.5 Applicable and governing law clause**

The Agreement shall be subject to all laws of the federal government of the United States of America and to the laws of the state of Texas. All duties of either party shall be legally performable in Texas. The applicable law for any legal disputes arising out of the Agreement shall be the law of (and all actions hereunder shall be brought in) the state of Texas, and the form and venue for such disputes shall be Dallas County of the appropriate district or justice court.

### **1.20.6 Notices clause**

All notices or communications required or permitted as a part of the Agreement shall be in writing (unless another verifiable medium is expressly authorized) and shall be deemed delivered when one of the following occurs:

- A. Actually received
- B. Upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the party
- C. If not actually received, 10 days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the

respective other party at the address set out in the section of the Agreement titled "Identification of the Parties to the Agreement" or such other address as the party may have designated by notice or agreement amendment to the other party

- D. Upon delivery by the District of the notice to an authorized vendor representative while at the district site

Consequences to be borne due to failure to receive a notice due to improper notification by the intended receiving party of a new address will be borne by the intended receiving party.

### 1.20.7 Survival Clause

All duties and responsibilities of any party that, either expressly or by their nature, extend into the future, shall extend beyond and survive the end of the contract term or cancellation of the Agreement.

### 1.20.8 Force Majeure Clause

Timely performance is essential to the successful initial implementation and ongoing operation of the system described herein. However, neither party will be liable for delays in performing its obligations under the Agreement to the extent that the delay is caused by force majeure.

#### 1.20.8.1 Force majeure requisites

Force majeure shall not be allowed unless:

- A. Within three calendar days of the occurrence of force majeure, the party whose performance is delayed thereby shall provide the other party or parties with written notice explaining the cause and extent thereof as well as a request for a time extension equal to the estimated duration of the force majeure events.
- B. Within seven calendar days after the cessation of the force majeure event, the party whose performance was delayed shall provide the other party written notice of the time at which force majeure ceased and a complete explanation of all pertinent events pertaining to the entire force majeure situation.

#### 1.20.8.2 120-day maximum

Under no circumstances shall delays caused by a force majeure extend beyond 120 days from the scheduled delivery or completion date of a task, unless by prior (to the 120 days) written notice of permission of the other party. Failure to secure this written prior permission, even in the case of force majeure, shall constitute default by the party failing to meet the requirement.

#### 1.20.8.3 Right of cancellation

Either party shall have the right to cancel the Agreement if force majeure suspends performance of scheduled tasks by one or more parties for a period of 120 or more days from the scheduled date of the task. If a cancellation due to a force majeure occurs before title passes to the District, the Vendor may keep any parts of the system as it can salvage, but must remove same at its own expense. If cancellation occurs due to a force majeure after title passes to the District, the system

shall remain with the District and the Vendor shall be entitled to any such payments as have accrued according to the payment schedule.

#### 1.20.8.4 Cancellation for convenience

The Garland Independent School District reserves the right to cancel any contract (purchase order) resulting from this Request for Proposal at any time, for any reason (or for no reason) with a thirty (30) day written notice to the contractor(s). Any notice required or permitted to be delivered to the contractor(s) shall be deemed to be delivered when mailed by registered or certified mail, return receipt requested, postage prepaid, and addressed to the Solicitationer's address appearing on the face of the Request for Proposal (or as subsequently revised or changed). Any compensation due the contractor(s) will be limited to items received and/or services performed and accepted by the District.

### 1.21 INCORPORATION BY REFERENCE

The Vendor shall supply software, equipment, training, and other related services adequate to accomplish the requirements as set forth in the RFP and the vendor response to the RFP. Parties agree that where there is a conflict between terms of the Agreement and the information presented in the referenced documents, the Agreement shall take precedence. The parties also agree that where there is not a conflict between the Agreement and the information presented in the referenced documents, all terms, conditions, and offers presented in the Vendor's proposal shall herein be referenced to the Agreement and shall be binding upon all parties to the Agreement.

### 1.22 NON-WAIVER OF AGREEMENT RIGHTS

It is the option of any party to the Agreement to grant extensions or provide flexibilities to the other party in meeting scheduled tasks or responsibilities defined in the Agreement. Under no circumstances, however, shall any parties to the Agreement forfeit or cancel any right presented in the Agreement by delaying or failing to exercise the right or by not immediately and promptly notifying the other party in the event of a default. In the event that a party to the Agreement waives a right, this does not indicate a waiver of the ability of the party to, at a subsequent time, enforce the right. The payment of funds to the Vendor by the District should in no way be interpreted as acceptance of the system or the waiver of performance requirements.

### 1.23 GENERAL INDEMNIFICATION

The Vendor agrees to indemnify, hold harmless, and defend the District, its Board and its Board members in their official and individual capacities as well as its successors, assignees, employees, contractors, and agents from and against any and all claims, costs, expenses, damages, and liabilities, including reasonable attorney's fees, arising out of (i) the negligent act or willful misconduct of the Vendor, its officers, directors, employees, and agents, (ii) any breach of the terms of the Agreement by the Vendor, or (iii) any breach of any representation or warranty by the Vendor under the Agreement. The District agrees to notify the Vendor by certified mail, return receipt requested, immediately upon knowledge of any claim, suit, action,

or proceeding for which it may be entitled to indemnification under the Agreement. The Vendor shall have the sole right, but not the obligation, to control the defense of any such claim. The District agrees to provide reasonable assistance to the Vendor, at the Vendor's expense, in defense of same.

### **1.24 PATENTS, COPYRIGHTS, AND PROPRIETARY RIGHTS**

The Vendor, at its own expense, shall completely and entirely defend the District from any claim or suit brought against the District arising from claims of violation of United States patents or copyrights resulting from the Vendor or the District's use of any software, equipment, documentation, and/or data developed in connection with the services and products described in the Agreement. The District will provide the Vendor with a written notice of any such claim or suit. The District will also assist the Vendor, in all reasonable ways, in the preparation of information helpful to the Vendor in defending the District against this suit.

In the event that the District is required to pay monies in defending such claims resulting from the Vendor being uncooperative or unsuccessful in representing the District's interest, or in the event that the District is ordered to pay damages as a result of a judgment arising out of an infringement of patents and/or copyrights, the Vendor agrees to fully reimburse the District for all monies expended in connection with these matters. The District retains the right to offset against any amounts owed to the Vendor any such monies expended by the District in defending itself against such claims.

Should a court order be issued against the District restricting the District's use of any product of a claim, and should the Vendor determine not to further appeal the claim issue, at the District's sole option the Vendor shall provide, at the Vendor's sole expense, one the following:

- Purchase for the District the rights to continue using the contested product(s)
- Provide substitute products to the District, which are, in the District's sole opinion, of equal or greater quality
- Refund all monies paid to the Vendor for the product(s) subject to the court action, the Vendor shall also pay to the District all reasonable losses related to the product(s) and for all reasonable expenses related to the installation and conversion to the new product(s).

### **1.25 NONDISCRIMINATION BY VENDORS OR AGENTS OF THE VENDOR**

Neither the Vendor nor anyone with whom the Vendor shall contract shall discriminate against any person employed or applying for employment concerning the performance of the Vendor's responsibilities under the Agreement. This discrimination prohibition shall apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, sex, religion, age, national origin, or ancestry. A breach of this covenant may be regarded as a default by the Vendor of the Agreement

### **1.26 SUBCONTRACTORS**

Vendors may use subcontractors in connection with the work performed under the Agreement. When using subcontractors, however, the Vendor must obtain written prior approval from the District for activities or

duties to take place at the district site. In using subcontractors, the Vendor agrees to be responsible for all their acts and omissions to the same extent as if the subcontractors were employees of the Vendor.

## **1.27 EFFECT OF REGULATION**

Should any local, state, or national regulatory authority having jurisdiction over the District enter a valid and enforceable order upon the District that has the effect of changing or superseding any term or condition of the Agreement, such order shall be complied with, but only so long as such order remains in effect and only to the extent actually necessary under the law. In such event, the Agreement shall remain in effect, unless the effect of the order is to deprive the District of a material part of its agreement with the Vendor. In the event this order results in depriving the District of materials or raising their costs beyond that defined in the Agreement, the District shall have the right to rescind all or part of the Agreement (if such a rescission is practical) or to end the Agreement term upon 30 days written prior notice to the Vendor. Should the Agreement be terminated under such circumstances, the District shall be absolved of all penalties and financial assessments related to cancellation of the Agreement.

## **1.28 PROJECT MANAGEMENT STAFF DESIGNATION**

The Vendor understands that the successful installation, testing, and operation of the system that is the subject of this document shall be accomplished by a cooperative effort. To most effectively manage this process, the Vendor shall designate a single representative to act as project manager, who shall have the authority to act on behalf of the Vendor on all matters pertaining to the Agreement.

In the event that an employee of the Vendor is, in the opinion of the District, uncooperative, inept, incompetent, or otherwise unacceptable, the Vendor agrees to remove such person from responsibility in the project. In the event of such a removal, the Vendor shall, within 15 days, fill this representative vacancy as described above. Regardless of whom the Vendor has designated as the representative, the Vendor's organization remains the ultimate responsible party for performing the tasks and responsibilities presented in the Agreement.

## **1.29 ASSIGNMENTS**

The District and the Vendor each binds themselves, their partners, successors, and other legal representatives to all covenants, agreements, and obligations contained in the Agreement.

## **1.30 VENDOR AS INDEPENDENT CONTRACTOR**

It is expressly agreed that the Vendor is not an agent of the District, but an independent contractor. The Vendor shall not pledge or attempt to pledge the credit of the District or in any other way attempt to bind the District.

## **1.31 INSURANCE**

### **1.31.1 Workers' compensation coverage**

The Vendor shall procure and maintain, during the life of the Agreement, workers' compensation insurance, including employer's liability coverage, in accordance with all applicable statutes of the state of Texas.

### **1.31.2 Commercial general liability insurance**

The Vendor, at the Vendor's sole cost and expense, shall procure and maintain, during the life of the Agreement, commercial general liability insurance on an "Occurrence Basis" with limits of liability not less than one million dollars per occurrence, personal injury, bodily injury, and property damage with a minimum \$2 million aggregate. Coverage shall include the following features: (i) contractual liability; (ii) products and completed operations; (iii) independent contractors coverage; (iv) broad form general liability extensions or equivalent; (v) deletion of all explosion, collapse, and underground (XCU) exclusions, if applicable; (vi) per contract aggregate. In addition, a minimum \$5 million umbrella insurance policy that follows form above all liability policies.

### **1.31.3 Motor vehicle liability**

The Vendor, at the Vendor's sole cost and expense, shall procure and maintain, during the life of the Agreement, motor vehicle liability insurance, including applicable no-fault coverages, with limits of liability of not less than one million dollars per occurrence combined single-limit bodily injury and property damage. Coverage shall include all owned vehicles and all hired vehicles.

### **1.31.4 Cyber liability**

The Vendor, at the Vendor's sole cost and expense, shall procure and maintain, during the life of the Agreement, cyber liability insurance with limits of liability of not less than five million dollars per occurrence or claim. Coverage shall be sufficiently broad to respond to the duties and obligations as are undertaken by the Vendor in the Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion, and network security. The policy shall provide first party and third-party coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

### **1.31.5 Additional insured**

The following shall be named additional insureds: GISD, including all elected and appointed officials; all employees and volunteers; and all boards, commissions and/or authorities and their board members, employees, and volunteers.

This coverage shall be primary to the additional insureds and not contributing with any other insurance or similar protection available to the additional insureds, whether other available coverage be primary, contributing, or excess.

### **1.31.6 Notice of cancellation or change**

Workers' compensation insurance, commercial general liability insurance, and motor vehicle liability insurance, as described above, shall include an endorsement stating the following: 60 days Advance Written Notice of Cancellation or Non-Renewal shall be sent to: Garland Independent School District, 501 S. Jupiter, Garland, TX 75042.



### **1.31.7 Proof of insurance coverage**

The Vendor shall provide the District, at the time the Agreements are returned for execution, certificates of insurance and/or policies, acceptable to the District, as listed below:

- C. Two copies of certificate of insurance for worker's Compensation insurance
- D. Two copies of certificate of insurance for commercial general liability insurance
- E. Two copies of certificate of insurance for vehicle liability insurance
- F. Two copies of certificate of insurance for cyber liability insurance
- G. Original policy, or binder pending issuance of policy, for owners and contractors protective liability insurance
- H. If so requested, certified copies of all policies shall be furnished

### **1.31.8 Continuation of coverage**

If any of the above coverage expires during the term of the Agreement, the Vendor shall deliver renewal certificates and/or policies to GISD at least 10 days prior to the expiration date.

### **1.31.9 Failure to comply**

Failure to comply with the insurance requirements contained in the Agreement shall constitute a material violation and breach of the Agreement and may result in termination of the Agreement.

## **1.32 WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE**

The District has presented detailed technical specifications of the particular purpose for which the solution is intended. The District has provided detailed descriptions and criteria of how the system can be defined to accomplish this particular purpose. The District has also defined the exact procedures and techniques to be employed in testing whether the system has achieved the defined performance of this particular purpose. Given this advanced preparation concerning, and documentation about, the District's particular purpose, the Vendor, at the time the Agreement is in force, has reason and opportunity to know (i) the particular purpose for which products are required, and (ii) that the District is relying on the Vendor's experience and knowledge of these products to provide those that are most suitable and appropriate. Therefore, the Vendor warrants that the system is fit for the purposes for which it is intended as described in this document.

## **1.33 WARRANTY**

The Vendor warrants that any and all hardware components provided under the Agreement, whether installed initially or under subsequent purchase orders, shall be newly manufactured equipment or assembled from newly manufactured parts; approved by Underwriter's Laboratories; and free from defects in workmanship or material for a period of 12 months (365 calendar days) from the date of final system acceptance. During this 12-month warranty period, the Vendor shall furnish all replacement new parts, shipping costs, repaired parts, service labor, travel costs, and other repair costs at no cost to the District. At the conclusion of the warranty period, the District will consider vendor support under a separate maintenance agreement.

### **1.34 FINAL ACCEPTANCE OF THE SYSTEM**

The system proposed shall be defined to be finally accepted by the District after the installation of the software equipment, training, and successful completion of the following performance examinations: system hardware examination, performance examination, system functional competence examination, system capacity examination, full-load processing capacity examination, system availability examination, training, and system documentation. The District and its consultants shall be the sole judge of whether all conditions for final acceptance criteria have been met.

### **1.35 STANDARD FORMS AND CONTRACTS**

Any forms and contracts the Vendor(s) proposes to include as part of any agreement resulting from this bid between the Vendor(s) and the District *must* be submitted as part of the proposal. Any forms and contracts not submitted as part of the bid and subsequently presented for inclusion may be rejected. This requirement includes, but is not limited to, the following types of forms: subcontractor, franchise, warranty agreements, maintenance contracts, and support agreements.

### **1.36 NON-COLLUSION COVENANT**

The Vendor hereby represents and agrees that it has in no way entered into any contingent fee arrangement with any firm or person concerning the obtaining of the Agreement. The Vendor certifies that its proposal is made without any previous understanding, agreement, or connection with any person, firm, or corporation making a proposal for the same services and is, in all respects, fair, without outside control, collusion, fraud, or otherwise illegal action.

### **1.37 TEXAS HOUSE BILL 1295, CERTIFICATE OF INTERESTED PARTIES**

If the individual contract/award exceeds \$1,000,000 or goes to the Board of Trustees (if total amount awarded exceeds \$75,000), the person or entity submitting this proposal must comply with House Bill 1295 which is codified in the Texas Government Code §2252.908 effective January 1, 2016, by submitting a completed and signed Form 1295, Certificate of Interested Parties within 10 days after notification of intent to award. The appropriate form and additional information is available from the Texas Ethics commission at [www.ethics.state.tx.us/index.html](http://www.ethics.state.tx.us/index.html). The District cannot engage in any contract that does not meeting this requirement.

### **1.38 ADVERTISEMENT**

The laws of the state of Texas, the District purchasing policies, and the legal advertisement for contractors and purchases are made a part of any agreement entered into in the same respect as if specifically set forth in that agreement.

### **1.39 SELECTION CRITERION**

The District intends to enter into a long-term relationship with a well-established vendor whose products, features, design philosophy, and support policies come closest to meeting the District's needs. The selected vendor must be a well-established, financially stable firm committed to technology in K-12; will have a commitment to attracting and retaining an excellent staff of technical and product support personnel; and

will have a proven track record of support from installation planning through implementation and ongoing use. There should also be evidence of responsiveness to clients' suggestions for improvements. Finally, there must be a good fit between Vendor's staff and the District's staff to assure a good working relationship.

Tie proposals, which are equal in all respects, shall be resolved and awarded in accordance with Local Government Code (Texas) Para. 271.901. Otherwise proposals, which reflect a tie in price, only may be awarded pursuant to the permissible factors listed in Texas Education Code, Subchapter B, Sec. 44.031 (b) and set forth below:

1. the purchase price;
2. the reputation of the vendor and of the vendor's goods or services;
3. the quality of the vendor's goods or services;
4. the extent to which the goods or services meet the district's needs;
5. the vendor's past relationship with the district;
6. the impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses;
7. the total long-term cost to the district to acquire the vendor's goods or services; [and]
8. for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner:
  - . has its principal place of business in this state; or
  - . employs at least 500 persons in this state; and

Per Texas Education Code, Subchapter B, Sec. 44.031 (b) \*ALL CONTENTS PROVIDED IN THIS SOLICITATION, WILL BE CONSIDERED AS AN EVALUATION FACTOR!

- a. the purchase price;
- b. the reputation of the vendor and of the vendor's goods or services;
- c. the quality of the vendor's goods or services;
- d. the extent to which the goods or services meet the district's needs;
- e. the vendor's past relationship with the district;
- f. the impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses;
- g. the total long-term cost to the district to acquire the vendor's goods or services; [and]
- h. for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner:
  - . has its principal place of business in this state; or

- . employs at least 500 persons in this state; and
- 2. Per Texas Education Code, Subchapter B, Sec. 44.031 (b) \*ALL CONTENTS PROVIDED IN THIS SOLICITATION, WILL BE CONSIDERED AS AN EVALUATION FACTOR!

## **1.40 SPECIAL NOTES**

Failure to include in the proposal all information outlined above may be cause for rejection of the proposal.

The District reserves the right to accept the Vendor's replacement of any component if it is considered equal or superior to the specifications. Such acceptance will be in writing.

## **1.41 REJECTION OR AWARD OF CONTRACT**

The District reserves the right to reject any or all proposals or any part thereof, to waive informalities, and to accept the proposal deemed most favorable to the District. The District reserves the right to reject all proposals and terminate the RFP process at any time.

The District expects to enter into negotiations with one or more responsible vendors whose proposals are determined to be the most advantageous to the District, taking into consideration price, the evaluation criteria set forth in this RFP, and any other factors the District deems relevant.

No proposal or acceptance or negotiation of a proposal shall be binding upon the District unless and until the District and the Vendor have entered into a definitive agreement signed by a duly authorized officer of the District. Any contract entered into between GISD and the Vendor shall contain such representations, warranties, covenants, performance guarantees, indemnities, remedies, conformity with Texas law, and such other items as are customary in similar transactions and that are consistent with this RFP and the Vendor's proposal.

## **1.42 CRIMINAL BACKGROUND SCREENING**

The District is committed to ensuring a safe environment for students, employees, and district visitors. Accordingly, the District requires criminal background certification compliance from vendors and subcontractors who perform work at any district facility. Each vendor or subcontractor shall certify that all legally required criminal history and criminal record checks, electronic fingerprint scans (Texas and FBI), and/or any other background check requirements are conducted in accordance with applicable provisions within Sections 22.0834 and 22.08341 of the Texas Education Code (TEC), and all other applicable federal and state laws concerning background checks. These results must be sent directly to the District. Additionally, the Vendor must certify that no owner, employee, agent, representative, vendor, and/or other personnel of the Vendor will be on any district premises if they are a registered criminal sexual offender under the Sex Offenders Registration Act, Public Act 295 of 1994, or have been convicted of a "Listed Offense" as defined under Chapter 62 of the Texas statutes.

### 1.42.1 Fingerprinting Requirement

- a) Suppliers who will only deliver but not enter a school building to perform services will be required to complete and submit the **CERTIFICATION FOR CRIMINAL HISTORY CHECK FORM only**, prior to beginning services.
- b) Suppliers who will deliver and enter a school building to perform services will be required to complete the Criminal History Check process described below, prior to beginning services should be completed and returned after all personnel have been fingerprinted.

### 1.42.2 Criminal History Checks

- a) During the term of this agreement, the firm's employees have the potential to have continuing duties and direct contact with students. Subsequently, the supplier is responsible for complying with Texas Education Code § 22.0834. Supplier may not commence work until all employees have been approved by the Purchasing Department.

At a minimum, the company recommended for award shall:

- b) Obtain required criminal history record information, through the Department of Public Safety's Fingerprint-based Applicant Clearinghouse of Texas (FACT), regarding its employees assigned to work GISD premises. The following steps should be followed to complete the process:

All suppliers must:

- c) Follow instructions on the award letter provided by Purchasing to arrange an appointment for employees to be finger-printed. Employers may select the most convenient location to their zip code.
- d) After fingerprinting is completed, email Penny Dabbs, Administrative Assistant to Executive Director of Purchasing at [PLDabbs@garlandisd.net](mailto:PLDabbs@garlandisd.net) and provide the following: RFP number, full name, and date of birth for all personnel assigned to work on-site during the contract term. If it is not possible to verify an employee based on the name and date of birth, it may be necessary to provide a driver's license number or state identification card.
- e) If an employee is arrested while under contract, you must contact Dana Knox, GISD Human Resource Specialist of Fingerprinting/Investigations at 972-487-3213. The incident must be reported within 3 business days of the arrest.

Notify GISD Purchasing Department if employees leave employment with the firm during the contract term or cease responsibilities on GISD property.

### **1.43 PURCHASE ORDERS AND CONFIRMATIONS**

The Garland Independent School District will email purchase orders in lieu of facsimile transmission. In addition to purchase orders, all solicitation notices, and award notifications will be communicated by email.

## **PROJECT REQUIREMENTS AND SPECIFICATIONS**

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## 2 GENERAL REQUIREMENTS

### 2.1 INTENT

GISD is currently using Oracle’s E-Business Suite (EBS). As the District continues to streamline and optimize operations and is more reliant on data for making decisions, this system is no longer meeting the needs of the District. The District intends to replace this system with a system that is capable of providing improved efficiency as well as the additional reporting and visibility the District now requires.

The District is seeking proposals for a comprehensive ERP solution—whether suite-based, best-of-breed, or a hybrid approach—that integrates Finance, Procurement, and Human Capital Management (HCM), ensuring scalability, compliance, and seamless interoperability with existing and future systems.

### 2.2 SCOPE

GISD requires that responding vendors propose a complete solution, including software, project management, change management, and other technology products and related services for the scope of the project that the Vendor is bidding (e.g., if the Vendor is bidding on all except Reporting, the remaining modules must be turnkey).

An outline of the required software system solution has been provided as follows:

MODULES	SERVICES
<ul style="list-style-type: none"> <li>● Accounts Payable</li> <li>● Accounts Receivable &amp; Invoicing</li> <li>● Budgeting</li> <li>● Employee Expense Reimbursement</li> <li>● Fixed Assets</li> <li>● General Ledger</li> <li>● Inventory</li> <li>● Procurement</li> <li>● Project &amp; Grant Accounting</li> <li>● Talent Acquisition</li> <li>● Benefits</li> <li>● Employee/Manager Self-Service</li> <li>● Human Resources</li> <li>● Time, Leave &amp; Absence Management</li> <li>● Payroll</li> <li>● Performance Management - OPTIONAL</li> <li>● Position Control</li> <li>● Professional Development &amp; LMS</li> <li>● Reporting &amp; Analytics</li> </ul>	<ul style="list-style-type: none"> <li>● Implementation Services</li> <li>● Organizational Change Management</li> <li>● Project Management</li> <li>● Data Migration</li> <li>● Integration Development</li> <li>● Software Installation and Configuration</li> <li>● Security and Access Control Configuration</li> <li>● Hardware Installation and Configuration (if applicable)</li> <li>● Software Modifications</li> <li>● Report, Form, and Workflow Development</li> <li>● Training Services, including development of training materials</li> <li>● Knowledge Transfer to staff</li> <li>● Testing Services</li> <li>● System Documentation Development</li> <li>● Ongoing Support and Maintenance Services</li> <li>● Ongoing Hosting Services</li> </ul>



**See Appendix A: Key Volumes** for information regarding current state key data volumes. The goals of this system are to:

- Enhance both strategic and operational planning and decision making
- Increase operational efficiency via automation and optimization of business processes
- Enhance financial management and compliance
- Improve user experience and self-service capabilities
- Improve integration and adaptability to change

## 2.3 MINIMUM REQUIREMENTS

The proposed solution must meet the following minimum requirements to be considered for award. If your system does not comply, it will not be considered for an award:

Where referenced, “similar size and complexity” is defined as a K-12 public school system having three (3) of the following four (4) criteria:

- At least 25,000 student enrollment
- At least 3,500 total staff, including instructional, administrative, and support staff
- At least \$350 million annual operating budget
- At least 40 schools and administrative facilities combined

### 2.3.1 Installed base

The proposed solution must have an installed base of similar size and complexity in the United States. An installed base of similar size and complexity in the state of Texas is preferred but not required.

### 2.3.2 Current version

- Software release(s) for the proposed solution must be considered generally available to customers.
- A minimum of three (3) referenceable K-12 school districts, of similar size and complexity, must be live on a software release that is not older than 12 months from the proposed solution.
- Vendors must be able to provide demonstrations using an environment with the proposed solution, or the most current, generally available release at the time of demonstration.

### 2.3.3 Web-based

- The system must be fully accessible via modern web browsers, including Chrome, Edge, Firefox, and Safari (latest versions).
- The system must be developed using modern web technologies and should be a cloud-based (SaaS) or browser-based solution without reliance on legacy desktop applications.

### 2.3.4 Secure Authentication

The proposed solution must support modern authentication standards, including OAuth 2.0, OpenID Connect (OIDC), SAML 2.0, or API key authentication with configurable security controls, such as expiration management and access scope restrictions. The system must enforce role-based access control (RBAC) or an equivalent access control framework (e.g., Attribute-Based Access Control (ABAC) or Policy-Based Access Control (PBAC)) to ensure secure and granular user permissions.

### 2.3.5 Integration

The proposed solution must have the ability to integrate seamlessly with other key internal District operational systems and external third parties. The solution must support:

- Enhanced Interoperability - configurable ETL tools and/or middleware options.
- Modern, Standards-Based API Support – The system must provide documented RESTful APIs using JSON, XML, or plain text such as CSV.
- Real-Time Integration – The system must support webhooks or an equivalent event-driven mechanism for real-time updates.
- Cloud & Hybrid Compatibility – The system must integrate with both cloud-based and on-premise systems.

### 2.3.6 Report writer

The system must include a built-in report writer that allows non-technical end users to create, modify, and share reports. The tool must:

- Provide real-time access to data from all system modules.
- Enable users to select, filter, sort, join, correlate, and summarize data dynamically.
- Support multiple output formats (e.g., PDF, Excel, CSV) and visualization options (e.g., charts, dashboards).
- Allow for role-based access control (RBAC) or equivalent to restrict report visibility and modification.

## 2.4 IMPLEMENTATION SCHEDULE

GISD intends to implement an ERP system(s) with a go-live date as stated in **Section 1.3, Schedule of Events**. The Vendor should completely explain within the body of the proposal how the Vendor intends to address this schedule. Any exceptions to this implementation schedule must be clearly stated in the vendor's proposal, and must include the vendor's recommended alternative scope, phasing, and timeline for implementation.

In addition to proposals to support the implementation schedule defined in **Section 1.3**, vendors are required to provide alternative proposals that detail their best practice for phasing and timing for the implementation based on the scope of the project and the size and complexity of the District articulated in this RFP.

## 2.5 PRICING MODEL

Vendors are to provide pricing only for a SaaS-based deployment model, specified as follows:

The system is installed and hosted by the vendor or at a third-party site arranged by the successful vendor. We define SaaS as a solution in which the vendor hosts the software and provides all hardware, disaster recovery, support, maintenance, database administration, redundancy, and connectivity to the cloud. The solution must be web-based and require NO client-side software other than standard browsers with plug-ins that the vendor must identify in their response. Hardware for time collection devices and software for mobile applications are exceptions.

The successful vendor is responsible for the installation and configuration of all software and utilities necessary for a fully operational system. The successful vendor will be responsible for all installation, training, and migration services. The successful vendor will be responsible for all hardware purchases and maintenance in this model.

Please note the following when preparing your proposal:

- Vendors shall provide firm and fixed pricing for the subscription based on the functionality described. For each item, indicate if the cost is one time, annual, or other. Vendors should indicate if their professional services fees are fixed or time-and-materials based.
  - In the event the product or service is provided at no additional cost, the item should be noted as ***no charge*** or with words to that effect
  - In the event the product or service is not being included in the vendor proposal, the item should be noted as ***no bid***
  - Vendors shall provide all pricing alternatives in the provided cost sheets (***do not provide separate vendor-formatted price sheets***)
- The Vendor shall provide prices in U.S. dollars
- The Vendor shall make clear the rationale and basis of calculation for all fees

In presenting software subscription fees, the Vendor should:

- Explain all additional pricing factors that could affect subscription fees
- Make clear what type of subscription metric(s) are offered for each price (named user, concurrent user, employees, suppliers, compute, etc.)
- Indicate which product versions, modules, and operating platform(s) are included for each price
- Make clear the extent of any implementation services that are included in the subscription fees (installation, configuration, training, support, etc.)

## 2.6 IMPLEMENTATION PLAN

The Vendor is to provide an implementation plan in narrative format supported by an activity-level project plan that details how the proposed solution is to be implemented. This implementation plan should include the following elements:

- General implementation approach
- Project management approach
- Organizational change management
- Data migration plan
- Report development
- Forms development
  - Workflow development
  - Integrations
  - Training
  - Testing
  - System documentation
  - Knowledge transfer, including any tools, templates, or training materials that the Vendor will provide to GISD.
- Ongoing support and maintenance

The Vendor should not be constrained to only include the above items in the Vendor's proposal if the Vendor feels that additional items will add value to the overall implementation. GISD requests that the Vendor provide their work plan in a Gantt chart format as part of the proposal. Additionally, the successful vendor must provide and maintain a detailed Gantt chart, showing tasks, dates, responsibilities, interdependencies, milestones, and critical path items throughout the implementation.

*It is expected that the Vendor will lead the efforts in each of the implementation areas described below unless stated otherwise.*

## 2.7 PROJECT MANAGEMENT

The Vendor will be required to provide project management services during the implementation to ensure that the project has the greatest possible degree of success. These services are to utilize industry standard project management tools and techniques. GISD expects the awarded vendor will minimally provide the following:

- **Work breakdown structure:** Including tasks, responsibilities, interdependencies and milestones. It is expected that this tool will be used to manage activities during all phases of the implementation.
- **Issues log:** To track the status and resolution of all issues during the implementation.

- **Regular (weekly) status meetings and reports:** To advise project leadership at GISD on the status of the implementation, including:
  - Progress to milestones
  - Project risks
  - Project budget
  - Upcoming activities
  - Homework items (outstanding and upcoming)
  - Other items as needed

## 2.8 CHANGE MANAGEMENT

The Vendor will be required to provide change management services throughout the implementation. These services are to include the development and execution, in collaboration with the District's implementation team, of a detailed change management plan which will minimally address the following:

- **Approach and methodology to:**
  - Identify anticipated changes resulting from the project
  - Prepare District staff and stakeholders for changes
  - Manage the implementation and adoption of those changes
  - Plans and strategies to sustain desired outcomes from changes
- **Change management roles & responsibilities for:**
  - Vendor provided change management lead and other resources
  - District staff:
    - Sponsors/leadership
    - Project management team
    - Implementation team
    - Staff and stakeholders
- **Other change management best practices for consideration**

## 2.9 SOFTWARE INSTALLATION

The Vendor is expected to specify, furnish, deliver, install, and support all system software for the hosted solution.

Please see detailed questions in **Appendix A**.

## 2.10 SOFTWARE CONFIGURATION

The Vendor is expected to meet with GISD to review and discuss software configuration prior to implementation. The outcome of these meetings will determine how the software shall be configured to best meet the needs of GISD.

Outline your approach to discovery, business requirements gathering, fit/gap analysis, and system design, culminating in the configuration of the ERP software. Provide a structured methodology that ensures alignment with District business objectives, industry best or leading practices, and compliance requirements.

## 2.11 SECURITY AND ACCESS CONTROL CONFIGURATION

The Vendor will be required to provide services for security and access control configuration for all solutions included in their proposal. These services are to minimally include design and implementation of role based access control (RBAC), user authentication services including SSO and MFA support, and automated user provisioning and de-provisioning.

Please see detailed questions in **Appendix A**.

## 2.12 ARCHITECTURAL AND APPLICATION DEVELOPMENT ROADMAPS

Vendors are to provide their architectural and application development roadmaps for the next three to five years.

## 2.13 REPORT DEVELOPMENT

The system must support end-user querying and reporting without negatively impacting the performance of the transactional system. Vendors should indicate how this is best achieved with their solutions, such as with dedicated reporting databases, in-memory processing, optimized indexing, or otherwise.

The Vendor is expected to provide assistance to GISD staff in the development of needed reports, via technical training on the tools used for report development, database schema and architecture, etc. The Vendor is also expected to provide a gap-analysis between the District's current operational reporting needs and the 'canned' reporting capabilities of their proposed solution to identify the scope for custom reporting needs at GISD.

Please see detailed questions in **Appendix A**.

## 2.14 DATA MIGRATION PLAN

As part of this implementation, vendors are required to provide data migration of the data indicated in **Appendix A**. The Vendor is required to perform data verification to confirm that all data was transferred successfully, and will be required to obtain GISD's signoff for confirmation as well.

The successful vendor(s) is expected to assist GISD in the migration of electronic data as well as with the coordination and planning related to manual data migration (e.g., hand keying) to the new system. It is expected that GISD will be responsible for data extraction from current systems and for data scrubbing and pre-processing the data. The successful vendor(s) will be responsible for overall data migration plan and coordination, definition of file layouts, and automated data import and validation into the new software. It is expected that GISD will be responsible for any manual data migration (e.g., hand-keying).

Vendors should provide pricing for migrating current, year-to-date, and prior year data as the base bid, and should also provide pricing for each additional year's worth of data as an option.

Please see detailed questions in **Appendix A**.

## 2.15 LEGACY DATA ARCHIVE AND REPORTING SOLUTION

The District has approximately 20 years of data in Oracle E-Business Suite (EBS) in addition to multiple years of data in other 3rd party systems like UKG (Kronos), Frontline (ATS), and Eduphoria (Performance Management). The District recognizes that leading practices for data migration to new ERP systems generally limits data scope to predominantly active master data and open transaction (operational) data. The District does not intend to keep these legacy solutions and does not currently have a data warehouse or equivalent data mart(s) for which to archive this data.

As an **optional** solution, vendors are requested to submit proposals to provide a secure, cloud-based archiving and reporting solution for the District's legacy data that is not intended to be migrated to the new ERP transactional environment. The proposed solution must provide for:

- Strategy and planning for archival of legacy data for the scope defined in **Appendix A**. It is expected that the District will work with the awarded vendor to refine and finalize the scope of archived data based on an evaluation of operational and analytical needs.
- Security and access controls
- Reporting and Analytics capabilities
- Training and change management services for business users to understand:
  - What sources exist for legacy versus active data in the new environment
  - How to access and generate reporting from those sources individually, as well as together

See **Appendix A** for data migration requirements. It is expected that legacy data older than 12-months prior to go-live dates be included in the scope for the data archive and reporting solution. The District seeks an appropriate solution for these historical retention and reporting requirements.

## 2.16 INTEGRATIONS

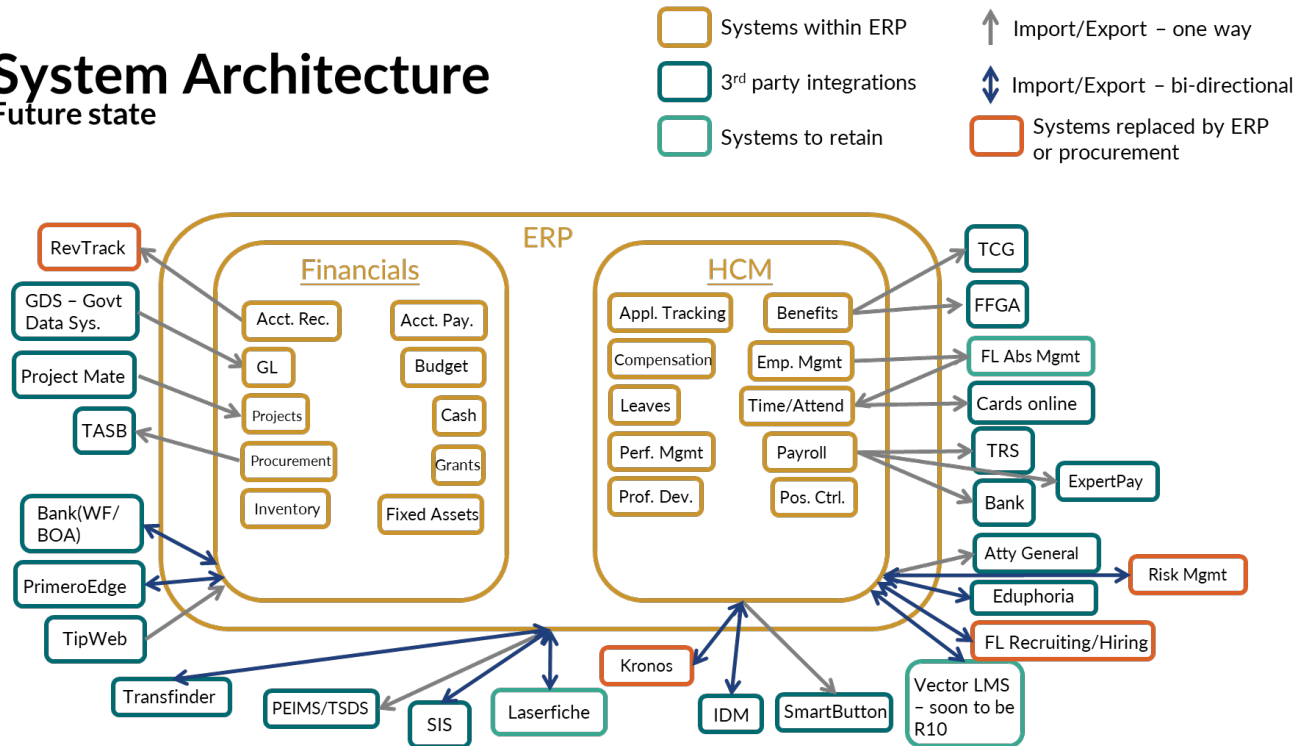
It is expected that information would only need to be entered once into the system. Modules within the system should be integrated in real time with each other such that batch processes are not required to transfer information from one area of the system to another unless that is the preference of GISD.

The system must support robust data integration capabilities, including real-time APIs, batch processing, and middleware compatibility, to enable seamless data exchange with third-party applications and legacy systems.

The following diagram illustrates a potential future-state architecture, although the final architecture will be dependent upon the suite of software procured through this solicitation.

# System Architecture

## Future state



See **Appendix A** for data integration requirements.

## 2.17 TRAINING

GISD has an expectation that:

- All power-user and technical training will be performed on site through implementation and be performed by the Vendor.
- End-user implementation training will be via vendor-provided training for power users and can use a train-the-trainer approach for extended areas with significant users including joint participation by the relevant GISD process owner and GISD IT services staff person supporting the process area.
- The Vendor will include training for GISD staff on the technologies required to support the new system.
- The awarded vendor will be responsible for providing training materials (in electronic format) for the initial vendor-delivered training as well as for use by GISD for subsequent training.

Any training that cannot be easily accommodated or is not practical to be performed on site should be specifically identified. GISD is open to conducting remote training via the internet, but additional information should be provided to understand the pros and cons of such an approach.



The Vendor should provide an overall description of their training approach that addresses the following (see **Appendix A** for specific questions):

- General time frames in which training will be conducted, given the go-live schedule stated earlier in this document
- List the nature, level, and amount of training to be provided in each of the following areas:
  - Technical training
  - User training (role-based)
  - Other staff (e.g., executive-level administration)
- Types of supporting documents and materials that will be developed by the Vendor
- Tools that will be used in developing the training material
- Ongoing training opportunities

Please see detailed questions in **Appendix A**.

## 2.18 TESTING

The Vendor should provide a detailed description of their recommended approach to the following types of testing during the implementation process, including the specific roles and responsibilities of both the Vendor and GISD in each phase:

- A. System testing - Outline the process for validating the core functionality of the system, including test cases, expected outcomes, and any required configurations.
- B. Integration testing - Describe the strategy for ensuring seamless integration between the ERP and other systems (e.g., third-party applications, legacy systems), including data flow, error handling, and resolution processes.
- C. Stress/performance testing - Detail the approach for evaluating system performance under peak load conditions, including stress testing, response time monitoring, and optimization methods.
- D. User acceptance testing - Explain the approach to UAT, including test planning, end-user involvement, feedback collection, and criteria for successful acceptance.
- E. Access control testing - Describe the approach and phase for testing user access management, including role-based access control (RBAC), segregation of duties (SoD), and/or enforcement of data policies. Explain how user permissions will be validated to ensure that access rights are granted only to authorized users and roles.

Additionally, the Vendor should define the level of assistance they will provide to GISD for each testing phase, including training, test script development, test environment setup, issue tracking, and post-testing support.

## 2.19 SYSTEM DOCUMENTATION

The Vendor is expected to provide user manuals and online help for use by GISD as part of the initial training and ongoing operational support. Additionally, the Vendor is expected to provide technical documentation. Describe what types of documentation you anticipate developing during the course of the project. Vendors must also provide access to existing documentation for review by the Selection Committee.

## 2.20 KNOWLEDGE TRANSFER

The Vendor should describe their process for ensuring that knowledge transfer to GISD staff occurs (e.g., power users, subject matter experts, and technical staff), such that staff is capable of providing Level 1 end-user support in the most efficient manner.

## 2.21 STAFFING PLAN

The Vendor must provide a comprehensive Staffing Plan detailing the following information about the resources assigned to the project (e.g., number of personnel, level of personnel, time commitment, etc.). Include resumes for all personnel who will be assigned to the project and include the following information:

- A. Role on the project
- B. Number of years employed at your company
- C. Number of years experience with conducting their proposed role on the project
- D. Expected amount of time (hours) that they will be committed to the project
- E. Expected amount of time (percentage) that they will be on-site versus off-site during the project
- F. Relevant previous experiences

If the Vendor is using a subcontractor, please include information on subcontracting staff being used and their specific role on the project. Additionally, the Vendor should address the following items:

- A. Expected amount of time (percentage) that they will be on-site versus off-site during the project
- B. Demonstrate your ability to provide continuity of skilled consultant resources throughout the duration of the project
- C. Describe the degree to which activities will be performed during normal business hours versus off-hours

Likewise, the comprehensive Staffing Plan must include identification of District resources that would be utilized during the course of the implementation. Provide resource efforts in terms of hours or full-time equivalents (FTEs), both for GISD's IT services department staff as well as those within the various district process-owning and process-using departments (the Business). At a minimum, client staffing requirements must include detail regarding the following:

- Staff roles required, e.g., leadership, management, SMEs, etc.

- Quantity of staff by role and area
- Level of effort, in hours or FTE, by role, area, and project phase

## 2.22 ONGOING SUPPORT AND MAINTENANCE

The Vendor shall be responsible for Level 2 and Level 3 support of the system and shall include these services in the annual cost proposal. Please see detailed questions in **Appendix A**.

Likewise, GISD requests that the Vendor provide information with respect to expectations of the district staff involvement in providing ongoing support of the application.

## 2.23 HOSTING REQUIREMENTS

Proposals for SaaS model solutions must meet the following requirements:

- A. The system must be available 24 x 7 x 365 with a minimum of 99.9% uptime, measured on a **monthly** basis. **A Service Level Agreement (SLA) specifying this guaranteed uptime and describing credits for performance below this guaranteed level must be provided with your response.** The SLA must meet the requirements specified in the Service Level Agreement section 2.24 of the RFP.
- B. Maintenance windows must be scheduled outside of normal business hours, and agreed upon with District staff. Windows should be pre-defined and communicated to District staff. Any non-standard window must be communicated to District staff at least two weeks in advance, with the exception of emergencies. In an emergency, vendors are to work with District IT staff to determine appropriate time and communication to staff.
- C. All data must reside in the United States at all times.
- D. All system data and files should be regularly backed up to a secondary data center/disaster recovery site outside of the main data center's same weather pattern and power grid. Backups shall occur such that the longest amount of time for transaction loss does not exceed 8 hours.
- E. Vendors should have a documented Security Incident Response Plan (SIRP) that addresses the vendor's plan for preventing, detecting, and responding to security breaches or cyberattacks in which the District's data or operations may be compromised.
- F. Vendors must have a documented Disaster Recovery Plan (DRP) that addresses recovery and maintenance of system data and operations in response to hazard or emergency scenarios. This plan should be tested regularly to ensure that it is both tangible and actionable.
- G. Vendors should have a documented Business Continuity Plan (BCP) that addresses localized or system outages that create an impact to one or more business functions. The BCP should account for the rapid restoration of services and redundancies in technology or process.
- H. Vendors must be compliant with SSAE18 SOC2 standards, specifically addressing security, availability, confidentiality, and privacy. The Vendor is required to provide a copy of their most recent SOC 2 Type II audit report, demonstrating compliance with these standards, prior to

contract award. The report must be current (within the last 12 months) and reflect the vendor's adherence to relevant controls during the audit period.

- I. In the case of a hosted or SaaS solution, GISD reserves the right to inspect and investigate thoroughly the data center facilities, equipment, business reputation, and other qualifications of the vendor and any proposed subcontractors and to reject any proposal irrespective of price if it shall be determined that the vendor is deficient in any of the essentials necessary to assure acceptable standards of performance. GISD reserves the right to continue this inspection procedure throughout the life of the Agreement that may arise from this RFP.

Vendors must respond to questions in **Appendix A** with regards to new releases, OS patching and data locations. Please provide a copy of your service level agreement that guarantees 99.9% uptime.

## 2.24 SERVICE LEVEL AGREEMENT

The District has the service level expectations for the proposed solution; the proposed SLA shall minimally include the following:

- A. Definition: "Availability" shall mean the availability of the proposed software solution for use by the District to access, view, process, and use content. The successful vendor shall use commercially reasonable efforts to make the software solution available with a Monthly Uptime Percentage of at least 99.9% during any calendar month. Subject to the SLA Exclusions, if the successful vendor does not meet the Service Level Commitment, the District will be eligible to receive a Service Credit. Any unavailability of the software solution resulting from scheduled maintenance for which the successful vendor provided advanced notice will not be considered downtime for the purposes of availability calculations, provided that the total scheduled maintenance does not exceed four (4) hours within a given calendar month .
- B. Measurement: The successful vendor shall be responsible for measuring and reporting the availability of the software solution using industry-standard monitoring tools and methodologies. Availability measurements must be performed continuously and recorded in a manner that allows independent verification.
- C. Service Level Commitment (SLC): The successful vendor shall ensure that, during each calendar month, the combined availability of the service is no less than 99.9%, calculated as the average monthly uptime. Planned maintenance, for which the District has been notified according to advance notification requirements, will not be included in the availability calculation.
- D. Service Credits and Remedial Actions: Every month, the successful vendor will compare the actual confirmed uptime to the Service Level Commitment (SLC) and provide a detailed report to the District. In the event that actual uptime falls below the agreed-upon SLC, the vendor shall take remedial action and issue service credits to the District in accordance with the following schedule. These credits will be issued on a monthly basis and applied to the District's next invoice. The vendor is responsible for notifying the District within 10 business days after identifying any shortfall in uptime.

	<b>Definition of Incident Priority Level</b>	<b>Response and Resolution Guarantees</b>
Critical	An incident causing application failure, downtime	Vendor will respond to incident within 30 minutes and will resolve incident within 4 hours.
High	An incident causing loss or failure of critical/essential functionality required to do business for which no temporary workaround is available	Vendor will respond to incident within 2 hours and will resolve incident within 8 hours.
Medium	An incident causing loss or failure of critical/essential functionality for which a temporary workaround is available	Vendor will respond to incident within 4 hours and will resolve incident within 12 hours.
Low	An incident causing loss of non-essential functionality for which a temporary workaround is available	Vendor will respond to incident within 8 hours and will resolve incident within 24 hours.

- D. Incident Management Procedure: The successful vendor shall respond to an incident resulting in the District’s loss of use or functionality of the software solution (“Incidents”) in accordance with time intervals and other requirements corresponding to the applicable Incident priority levels set forth in the below table. Incident priority levels will be reasonably determined by the successful vendor in a manner consistent with the below descriptions. The District shall provide commercially reasonable assistance to the successful vendor in connection with the successful vendor’s efforts to respond to an Incident.
- E. Notification and Reporting: The vendor shall provide the District with detailed uptime reports on a monthly basis, including metrics such as total uptime, downtime incidents, root causes, and any SLA breaches.
- F. Notifications of Maintenance
  - 1. Planned Maintenance - The vendor shall provide advance notice of any planned maintenance activities that may impact system availability or performance. Notification to the District should be at least 14 days in advance of any scheduled maintenance. To minimize disruption, the vendor shall schedule planned maintenance outside of the

District's peak hours, which are Monday through Friday from 6:00 a.m. to 6:00 p.m. CST. Maintenance activities that require system downtime or may significantly impact performance must be conducted during off-peak hours unless otherwise approved by the District.

2. Unplanned (Emergency) Maintenance - The vendor shall provide as much advance notice as possible for any emergency maintenance required to address security vulnerabilities, critical system failures, or urgent performance issues. The vendor shall make commercially reasonable efforts to notify the District at least 6 hours in advance.

## 2.25 OTHER COSTS

If any costs are associated with your proposed services that have not been identified in prior sections, they must be detailed here. Any such charges will be clearly identified, and all nonrecurring and monthly costs should be provided. These other costs, if any, must be shown using the form **Appendix A**.

## 2.26 ARTIFICIAL INTELLIGENCE (AI)

Vendors must provide a detailed overview of the artificial intelligence (AI) capabilities within their proposed solutions, including strategy, roadmap, current capabilities and proposed business value. Responses should focus on realized and proposed use cases for the K-12 industry across Finance, Procurement and HCM functions.

Responses should address how AI enhances automation, decision-making, predictive analytics, and overall operational efficiency. At a minimum, vendors should include the following :

- The vendor's AI strategy and how it integrates into the proposed ERP solution
- AI roadmap and how it aligns with future trends in enterprise automation and analytics
- AI capabilities of their solution that are currently available in production for the version of the solution proposed
- AI capabilities on the current development roadmap that are planned to be generally available by April 2026
- Whether AI capabilities are natively embedded within the ERP platform, or if they rely on third-party AI services that must be integrated
- Cost & Licensing Model - whether AI capabilities are bundled with the ERP solution, or as an add-on module, or through external AI provider. Note: Cost model should be outlined in Appendix A Pricing Form(s).

### 3 APPLICATION SOFTWARE REQUIREMENTS

**Appendix B** contains the application specifications for each desired system application module. In each of the above subsections, the **most critical** requirements for each application are presented. We believe that the majority of the requirements identified for these applications can be met by packaged software products with minimal software modification.

Each vendor should review the specifications and reports listed in each subsection and respond as to their availability within their software system. Vendors, at their option, may propose on specific sections only. The responses should be entered into the attached Excel spreadsheet under the “**Vendor Response**” column of the attached functional specification as follows:

- Y**      Functionality is provided out of the box through the completion of a task associated with a routine configurable area that includes, but is not limited to, user-defined fields, delivered or configurable workflows, alerts or notifications, standard import/export, table-driven setups, and standard reports with no changes. These configuration areas will not be affected by a future upgrade. The proposed services include implementation and training on this functionality, unless specifically excluded in the Statement of Work, as part of the deployment of the solution.
- R**      Functionality is provided through reports generated using proposed reporting tools.
- T**      Functionality is provided by proposed third-party functionality that has a standard integration or interface with the primary vendor solution (i.e., third party is defined as a separate software vendor from the primary software vendor). *This third-party software must be included in your costs in order to be identified as a “T” in your response.*
- M**      Functionality is provided through customization to the application, including creation of a new workflow or development of a custom interface, which may have an impact on future upgradability.
- F**      Functionality is provided through a future release that is to be available within one year of the proposal response.
- N**      Functionality is not provided.

Please return a copy of these files **in Excel format** in electronic format with your proposal.

## **APPENDICES (PROVIDED SEPARATELY)**

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Appendix A – Vendor Response – District Information, Forms, Questionnaires

Appendix B – Software Specifications