GISD

GARLAND INDEPENDENT SCHOOL DISTRICT

PURCHASING DEPARTMENT
501 S. Jupiter
Garland, Texas 75042

May 5, 2025

ADDENDUM 3, RFP #140-25

Enterprise Resource Planning Software and Services

This addendum modifies the original document as listed below and is hereby incorporated to the contract documents. Acknowledge receipt of this addendum by returning the completed and signed form with the solicitation response. Failure to submit the addendum may be used as an evaluated factor.

Change from: GISD ERP Software and Services RFP - App A Response Forms- Required Forms List

REQUIRED FORMS LIST

REQUIRED FORMS LIST - Electronic Copy Must be submitted in original Microsoft Excel format

APPENDIX A REQUIRED FORMS:

The following forms MUST be submitted as a part of your RFP Response

Required Forms List:
Criminal History Check
Confidential Information Declaration
Insurance Requirements
Comply Exception
References
Vendor Questionnaire
Pricing Form
Effort Hours
Integrations
Migration Data

Change to: GISD ERP Software and Services RFP - App A Response Forms- Required Forms List

Additional Required Form: <mark>Conflict of Interest Form attached to Addendum 3</mark>

Change from: Section 1.4.1 - 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).

Change to: Section 1.4.1 - 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 Conflict of Interest Form must accompany your bid proposal (see Attachment on Addendum 3)

#	Question	Response
1	Assuming a December 2025/January 2026 start date, is the District expecting a 6-month project for the entire scope? If so, is there something driving the district for a July 1, 2026 go-live date?	Please see Addendum #2 which clarifies the required project timeline for base bid proposals.
2	In section 2.3, you request a minimum of 3 references from a K-12 of similar size; however, later in the RFP and in the forms, it says 5 K-12 references. Can you please clarify the exact reference requirement?	Please provide a minimum of 5 K-12 references on the required form in Appendix A.
3	We noticed that the City of Garland included budget items for ERP replacement in its FY 2022–2023 budget. We would like to know whether Garland Independent School District (Garland ISD) has also allocated funds or developed plans for the replacement of its current EBS ERP system.	A specific budget is not being made publicly available for this project, however funds have been allocated according to the District's strategy for ERP replacement.
4	What release of database are you on currently?	The district's installation of Oracle E-Business Suite is using Oracle RDBMS release 19c (19.26).
5	What release of Oracle EBS are you on currently?	The district is currently running Oracle E-Business Suite release 12.2 (12.2.10).
6	Can you please provide the required "Non-Familial Form" referenced on Section 1.4.1, page 6, of the PDF "Garland ISD – ERP Software and Services RFP"? (Submitted during Pre-Proposal Call but including here as well if it's helpful!)	Please disregard Non-Familial Form and replace with the attached Conflict of Interest Form
7	For shortlisted vendors will the demonstrations be scripted?	Yes, demonstration scripts will be provided to finalist vendors after identification of the shortlist.
8	We would like to inquire about your team's preparedness from a staffing perspective to handle a fast-paced, full ERP implementation. We anticipate a demanding	Please see Addendum #2 which clarifies the required project timeline for base bid proposals. The District intends to allocate

	timeline and require a partner with sufficient resources and expertise to ensure a smooth and efficient process. Understanding your team's capacity, including the number of dedicated consultants, their experience with K-12 ERP implementations, and their availability to commit to an accelerated schedule, would be incredibly helpful as we move forward in our evaluation.	the resources necessary for a successful implementation based on the staffing requirements identified in the selected bidder's proposal.
9	While we fully appreciate the District's sense of urgency for completion of this project, we are not aware of any implementations with a similar scope for school districts (or local governments) that have been completed in the requested 6-7 month timeframe. Additionally, we do not have a variant of our methodology that would support this timeline. If we only submit a proposal with a longer timeline which is tailored around the District's preference and appetite for speed, would we be disqualified from consideration if we do not also respond with a 6-7 month scenario?	Please see Addendum #2 which clarifies the required project timeline for base bid proposals.
10	Would the District please elaborate on what is driving the desire to implement the ERP solution within a 6-7 month timeframe?	Please see Addendum #2 which clarifies the required project timeline for base bid proposals.
11	Do we qualify if we propose an SAP solution and our 5 reference implementations are with other ERP (Ex: Oracle, MS Dynamics, etc.) solutions in School Districts?	References listed in section 2.3 must be live on the proposed solution.
12	We have experience of implementing SAP solutions successfully for customers in other industries. Do we qualify if we share those references?	While this would not necessarily disqualify a bidder from consideration, the District strongly desires references from client districts whose environment matches what bidders are proposing to the greatest degree possible. Also see section 2.3 Minimum Requirements.
13	Can we use SAP references for school districts as a qualification?	SAP references can be used in a bidder's response assuming that the bidder was the SAP system integrator for the provided reference.
14	How many employees need to utilize physical time clocks for clocking in/out?	The district seeks a base quantity of 3,000 employees utilizing time collection devices.

15	How many physical time clocks is the district seeking to utilize for those seeking time clocks?	See Appendix A - Key Volumes The district seeks a base quantity of 250 time collection devices.
16	What type of credential at the time clock is the district seeking for the employee to utilize to identify themselves as they clock in/out? (bar code/magnetic swipe, rfid/proximity, biometric finger, pin number, or a combination)	See Appendix B - Time, Leave, Absence The district seeks a base configuration of biometric verification/identification (fingerprint), with a configurable option for adding PIN.
17	Does the district desire any of the following peripherals to be added on to the time clocks? (PoE enabled, Battery Backup, WiFi adaptor, Camera)	See Appendix B - Time, Leave, Absence The district seeks a base configuration of PoE, Battery Backup, and Biometrics (fingerprint).
18	What self-service tools are desired at the physical time clock devices? (Viewing leave balances, time off requests, viewing punches, approving punches, viewing schedules, changing positions, tracking time against project/work orders, receiving messages, etc.)	See Appendix B - Time, Leave, Absence The district seeks a configurable time collection device that is flexible and able to accommodate multiple requirements, including viewing leave balances, time off requests, viewing punches, approving punches, viewing schedules, changing positions, tracking time against project/work orders, receiving messages, emailing data, etc.
19	Is there a need for true mobile apps with geo fencing for employees?	See Appendix B - Time, Leave, Absence The district seeks capabilities of a mobile user experience with geofencing.
20	Are there any unions or collective bargaining agreements within the district that affect employee scheduling? If so how many CBAs and employee groups are affected?	No, the district does not have any unions or collective bargaining agreements (CBAs).
21	How many users will you need for Expense Management?	See Appendix A - Key Volumes The district seeks a base quantity of 500 for employee expense management and reimbursement functionality.

22	RFP subsection 1.4.1- The RFP indicates that hard copy binders of proposals are to be submitted. We request that vendors be allowed to submit proposals electronically via email or via a District-relevant site. If this request will not be granted, then we request that a proposal due date extension be granted; as, due to the various logistical considerations and time expended, providing hard copies significantly reduces the amount of time available to our team to respond.	GISD board policy has only authorized Oracle iSupplier as the only method for electronic submissions. A hard copy and USB will permit all vendors to submit a proposal. Please see Addendum #2 which clarifies the required timeline for bid proposals.
23	RFP subsection 1.8.5 - RFP subsection 1.8.5 reads, "The Vendor must include hard copies of the technical specifications/data sheets for each of the products being proposed." We do not understand the ask – please clarify specifically what the intent of this requirement is. Would brief module overviews/narrative text outlining the various functionalities of our solution meet this requirement?	The intent of this requirement is to ensure that the evaluation team has access to detailed information about the products being proposed. Vendors should provide printed copies (i.e., hard copies) of the product specifications and/or data sheets that describe the features, capabilities, and technical requirements of each major component or module included in their proposed solution. If the vendor provides digital product documentation (e.g., PDFs or links), they must also include printed versions in their submitted proposal package to comply with this requirement. These documents should be clearly labeled and organized to correspond with the proposed solution components.
24	RFP Section 3 -Per page 39 of the RFP, regarding the Appendix B Excel document, it says that "The responses should be entered into the attached Excel spreadsheet under the "Vendor Response" column of the attached functional specification…" There is no column in Attachment B labeled as "Vendor Response." Please clarify as to how vendors are to complete the document.	In Section 3 of the RFP, page 39, "Vendor Response" should be changed to "Availability". This coincides with the instructions documented in the Instructions tab of Appendix B Excel document.
25	How many FTEs, PTEs, and seasonal employees do you have? How many employees require scheduling software?	See Appendix A - Key Volumes The district does not have advanced scheduling requirements and does not expect to utilize advanced scheduling software.

		For Substitutes, the district plans to continue the use of Frontline Absence management and integrate accordingly with the proposed HR, Workforce Management, and Payroll solutions.
26	Is the district currently utilizing any form of artificial intelligence (AI) technology? If so, please describe the district's current policies or guidelines governing the use of AI.	Within the scope of ERP, the district does not currently utilize any material form of AI technology. Per CQ (LEGAL): Artificial intelligence (AI) is explicitly referenced in Texas Government Code § 2054.601. This section mandates that each state agency and local government, in the administration of their operations, consider using next generation technologies, including cryptocurrency, blockchain technology, robotic process automation, and artificial intelligence. The statute encourages adoption of emerging technologies to enhance operations and aims to improve efficiency, decision-making, and service delivery in government operations.
27	Can you share how the district currently manages position budgeting and position control? Specifically, are there tools or processes in place to track budgeted positions versus actual staffing?	Position budgeting and position control are two distinct functions that interact and support one another. The former focuses on annual financial planning and the latter focuses on operational and HR planning. The district currently uses a variety of integrated tools to track budgeted positions versus actual incumbents and headcounts. These transactional and reporting tools include Oracle Enterprise Performance Management (EPM) Planning & Budgeting Cloud Service (PBCS) in addition to custom Job Requisition and Personnel Action Request processes that extend the functionality of the Oracle E-Business Suite HR module.
28	Can you describe your current talent acquisition process, including how the district recruits, screens, and hires candidates? Are there specific challenges you're looking to address with a new system?	The district recruits through various channels, including traditional job fairs, university partnerships, targeted online postings on platforms like LinkedIn and Indeed, and district-wide social media campaigns. Our team actively promotes open roles to reach a diverse pool of

candidates across professional, paraprofessional, and auxiliary job categories.

The district's current talent acquisition and screening process begins in Frontline, our current applicant tracking system (ATS). Candidates apply through Frontline, and depending on the position, the hiring process is either managed by the Human Resources department or by campus/department hiring teams. We utilize a third-party video interview tool integrated with the ATS as part of the screening process.

Once a candidate is selected, offer discussions and approvals are handled manually. The Enterprise Content Management (ECM) system (Laserfiche) is used to issue letters of intent and manage onboarding documents digitally. However, many onboarding steps still require coordination across multiple platforms and spreadsheets, making the process cumbersome. Final candidate hire data must be manually entered into Oracle, our ERP system of record for Human Resources, which is not integrated with our other hiring tools.

The job approval process varies by position, and approvals for new positions are managed using Adobe Acrobat forms, which operate independently of our ERP system. This is a separate, linear process that often results in bottlenecks. Additionally, we use Job Requisitions to manage vacancies and approvals in conjunction with the Personnel Action Request (PAR) process, and maintaining those requisitions manually introduces another layer of complexity to the overall workflow. Requisitions and PARs are based on our current ERP, but there are still manually updated spreadsheets that accompany the processes.

Other Key Challenges We're Looking to Address with a New System:

		- Manual data entry and duplicate processes between systems, which slow hiring and introduce errors - No automation for offer letters or salary calculations, leading to delays and inconsistencies. - Linear PAR process, where one bottleneck can delay the entire workflow. - A separate job approval process that occurs outside of our ERP and lacks integration. - Manual tracking of JOB REQs and positions, which adds to process fragmentation. - Lack of real-time KPIs such as time to hire, turnover rates, and pipeline progress. - Disjointed systems, requiring staff to juggle multiple platforms and track progress via spreadsheets. - Overtime and staffing strain due to the volume of hires and the manual nature of current processes. - Candidate loss, as hiring delays sometimes cause us to lose high-quality applicants. The district is seeking an ERP system that will centralize and streamline talent acquisition, eliminate redundancies, and provide actionable data to support strategic staffing decisions across the district.
29	Budget Confirmation: Is there an approved or estimated budget range allocated for this ERP project that vendors should be aware of?	A specific budget is not being made publicly available for this project.
30	Proposal Submission Date: The RFP document references two submission deadlines—May 12, 2025 at 12:00 PM CST (Page 6), and May 16, 2025 at 1:00 PM CST (Page 5). Could you please confirm the correct and final deadline?	Refer to Addendum 2 for a detailed schedule of deadlines. The new proposal submittal deadline is May 20, 2025 at 1PM CST
31	Submission Method: Is it permissible to submit the proposal electronically via email or secure upload, or must it be submitted solely	Refer to question 22

	in printed hardcopy format accompanied by electronic media?	
32	Solution Suitability: Will Epicor Kinetic, provided as a single-vendor, SaaS-based suite covering Finance, Procurement, and HCM, meet the District's preference for an integrated solution?	The District will evaluate the suitability of any proposed solution upon receipt of proposals, assuming that the proposal meets the minimum requirements defined in Section 2.3 of the RFP.
33	Phased Go-Live Option: will GISD consider a phased approach based on best practices, as suggested in the RFP?	Yes, the District will consider proposals for a phased implementation.
34	Demonstration Format: During the demonstration window (July 28 – August 8, 2025), will the District require tailored scenarios or is a standard K-12 ERP environment demonstration acceptable?	Demonstration scripts will be provided to any finalist bidder invited for demonstrations. Generally, a standard K-12 environment will be sufficient to satisfy the requirements of the demonstration scripts, however it will be the bidder's responsibility to ensure that the demonstration environment is staged appropriately per script requirements.
35	Legacy System Access: Will the District provide data export formats or tools to facilitate data migration from Oracle EBS and third-party systems such as UKG, Frontline, and Eduphoria?	The District expects to work with their selected partner on strategy for data migration from all legacy systems to the new ERP as well as the required archiving solution, including a review of output formats.
36	Integration Scope: Could the District provide a prioritized list of systems that require integration with the new ERP platform, beyond those already listed?	Appendix A provides a comprehensive list of systems for integration, vendors are to base their proposals on that information. It is expected that the final integration scope will be finalized with the selected vendor during contract and SOW negotiations, based on the scope of software to be implemented.
37	User Volume by Role: For accurate SaaS subscription modeling, could you share the approximate number of end-users segmented by role (e.g., power users, casual users, technical support)?	See Appendix A - Key Volumes
38	Post-Go-Live Support: Are there expectations for onsite support following the go-live date,	Bidders are to propose a post go-live support model that meets their best practice for a successful implementation, and

	or is remote support sufficient for post-implementation services?	provide detail in their proposals regarding onsite versus remote support.
39	District PM Support: Will GISD assign a centralized internal project manager or designated point of contact to coordinate with the vendor throughout the implementation?	Yes.
40	Train-the-Trainer Approach – Would GISD be open to developing a Core Team composed of district employees who can be trained to retain and delegate and passed knowledge internally to end-user?	The District is open to considering a variety of training models with the priority being effective knowledge transfer to all user groups as necessary. Bidder's are to detail their proposed training approach in their submissions.
41	Evaluation Criteria – What criteria will GISD use to evaluate vendors and determine the awarding of submitted proposals?	Please see the attached Evaluation Points Development Form
42	1.1 Overview -Can you confirm whether Oracle Fusion Cloud Applications are acceptable, or is the intent to fully transition away from Oracle-based solutions, including Oracle Cloud?	The district has no specific preference regarding the ERP platform beyond selecting the solution that best meets the RFP requirements and aligns with the district's needs.
43	1.1 Overview -Since GISD uses Microsoft 365 (e.g., Teams, Outlook, Azure AD), would you prefer a Microsoft-based ERP such as Dynamics 365 for ecosystem alignment and ease of integration?	The district has no specific preference regarding the ERP platform beyond selecting the solution that best meets the RFP requirements and aligns with the district's needs.
44	1.8.2 Organizational Overview- Are there any existing or pending enterprise licensing agreements with ERP providers such as Microsoft, SAP, or Oracle that vendors should be aware of when proposing their solution?	The district currently holds enterprise licensing agreements with Oracle and Microsoft. However, proposals from all qualified ERP providers will be evaluated on merit.
45	2.3.4 Secure Authentication- How many user licenses are anticipated across the following categories: full access users, limited access users, and Employee/Manager Self-Service (ESS) users?	See Appendix A - Key Volumes

46	1.1 Overview -Implementation plan, are there specific modules (e.g., Payroll, Budgeting, HR) GISD prefers to prioritize early?	Bidders are to propose implementation plans/phasing that align to their experience with an approach that will maximize the probability of a successful implementation and minimize operational disruption during and after the implementation.
47	2.3.4 Secure Authentication- Does GISD currently have Single Sign-On (SSO) and Multi-Factor Authentication (MFA) solutions in place (e.g., Azure AD, Okta), or should the ERP vendor include implementation for these features?	Per Appendix A, the district already has SSO/MFA infrastructure and security architecture in place (Microsoft Entra ID), the ERP vendor just needs to integrate with the existing infrastructure. Per Appendix B, see Functional Area: "General & Technical", Use Case: "Comply with authentication security standards" regarding SSO/MFA requirements. Additionally, section 2.11 of the RFP specifies that bidders are to include services for security and access control configuration.
48	2.3.5 Integration- Could GISD provide a complete list of current third-party systems (e.g., Kronos, Frontline, Eduphoria) that will require real-time or batch integration with the new ERP?	Appendix A provides a comprehensive list of systems for integration, vendors are to base their proposals on that information. It is expected that the final integration scope will be finalized with the selected vendor during contract and SOW negotiations based on the scope of software to be implemented.
49	2.3.5 Integration- Is there a preferred integration protocol for existing systems (e.g., REST APIs, middleware, ETL), and will the ERP need to support real-time data exchanges via webhooks or similar mechanisms?	Appendix A provides a comprehensive list of systems for integration, vendors are to base their proposals on that information. It is expected that the final integration scope will be finalized with the selected vendor during contract and SOW negotiations based on the scope of software to be implemented.
50	2.6 Implementation Plan- Does the District have a preferred implementation methodology, such as Agile, Waterfall, or Hybrid? Or should vendors recommend the best fit based on GISD's complexity?	The district does not have a preferred implementation methodology. Bidders should propose the implementation methodology that aligns to their experience with an approach that will maximize the probability of a successful implementation and minimize operational disruption during and after the implementation.

		Vendors should specifically keep in mind the two requested proposals. The first proposal being an aggressive timeline for the district to achieve go-live of all functionality as early as is realistically possible, and the second of which should be based on 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.
51	2.6 Implementation Plan- Will GISD ensure access to functional stakeholders from departments such as Finance, HR, Payroll, and Procurement during discovery and validation workshops?	Yes.
52	2.8 Change Management- Will the ERP vendor be responsible for designing and executing the change management plan, or will this be a shared responsibility with GISD's internal team?	The district expects that the development and execution of OCM plans will be a shared responsibility between vendor partner(s) and internal resources. Bidders should clearly detail their proposed scope of services for OCM services in their submissions.
53	2.6 Implementation Plan-What training formats does GISD prefer for various user groups-virtual, onsite, or a train-the-trainer model-and will role-based training be required?	The district is open to considering a variety of training models with the priority being effective knowledge transfer to all user groups as necessary. Bidder's are to detail their proposed training approach in their submissions.
54	2.7 Project Management- Will GISD assign an internal Project Manager or Project Management Office (PMO), or is the vendor expected to provide full project governance and coordination?	Yes, the district intends to provide project management resources to work in a PMO model with the district's vendor partner(s).
55	2.3 Minimum Requirements-Beyond the minimum requirement of 5 live K-12 references of similar size and complexity with the same version of software offered, are there any additional eligibility or disqualifying criteria vendors should know? Also in RFP you mentioned one reference of this complex school with 3 out of 4 criterias matching, but excel sheet for references you mentioned 5	All minimum requirements have been identified in Section 2.3 of the RFP. Bidders are to provide 5 K-12 references that match your proposed solution and environment as closely as possible.

	needed, Can you please confirm do you need 1 or 5?	
56	2.3.2 Current Version- Must all references be active within the last 12 months, or will older implementations still be considered valid if the clients are still using the platform?	The requirement in 2.3.2 specifies that the software release currently running at provided references be no more than 12 months older than your proposed solution. Older implementations are acceptable as long as they are running a version of the solution that meets this criteria.
57	2.5 Pricing Model- The RFP specifies SaaS pricing-can you clarify if GISD prefers a licensing model based on employee count, named users, concurrent users, or another metric?	Bidders are to identify their proposed licensing metric in their submissions.
58	2.5 Pricing Model- Is there an estimated or target budget range (for implementation and SaaS subscription) that vendors should use to tailor their proposals and avoid over/under-scoping?	A specific budget is not being made publicly available for this project.
59	2 General Requirements- Please clarify the expectation on Organization Change Management. Typically planning and execution of Change Management are performed by designated internal stakeholders.	The district expects that the development and execution of OCM plans will be a shared responsibility between the district's vendor partner(s) and internal resources. Bidders should clearly detail their proposed scope of OCM services in their submissions.
60	2 General Requirements- There are at least 38 different interfaces mentioned in the excel worksheet Integrations, please help clarify if this ties to the system architecture provided in page 32/40 of the RFP. We are unable to correlate the individual applications listed in the Interfaces worksheet to the Architecture diagram.	Appendix A provides a comprehensive list of systems for integration, vendors are to base their proposals on that information. The provided architecture diagrams are intended to provide bidders with an idea of the complexity of the current ecosystem and a potential future state. It is expected that integration scope will be finalized with the selected vendor during contract and SOW negotiations based on the scope of software to be implemented. Please also note section 2.16 Integrations was clarified in Addendum 1 with updated diagrams that tie to the Appendix A Integrations tab.

61	Appendix A- Do we qualify if we propose an SAP solution and our 5 reference implementations are with other ERP (Ex: Oracle, MS Dynamics, etc.) solutions in School Districts?	Duplicate - Refer to question 11
62	Appendix A-We have experience of implementing SAP solutions successfully for customers in other industries. Do we qualify if we share those references?	Duplicate - Refer to question 12
63	Appendix A- Can we use SAP (OEM) references for school districts as a qualification?	Duplicate - Refer to question 13
64	Appendix A- Greenfield implementation of ERP considers only Open documents/Balances/open items for loading into the new ERP. The worksheet "Migration Data" specifies for many data objects multiple years of historical data has to be migrated as well. This is not applicable in Greenfield. Kindly clarify.	Proposing bidders are required to include all data conversion items from Appendix A in the scope of their response.
65	Appendix B-Is there any preferred OCR Technology as referred in sl no 10-Finance-Accounts Payable ? Are you currently using any OCR technology?	The district is not currently using any OCR technology. The district is seeking functionality to upload scanned invoices and extract machine-readable text using OCR or an equivalent technology. No specific OCR solution is mandated. Vendors are encouraged to propose the technology they believe best meets the requirement, including advanced or AI-enhanced alternatives to traditional OCR, provided they deliver equal or better results in data accuracy, processing efficiency, and ERP integration.
66	Appendix B-Do you need to maintain fund based information to be maintained in the system as referred to in Sino 66 Finance-Accounts Receivable?	Yes.
67	Appendix B- Slno 74: Please help clarify if this is only for the email sent, that you need a read receipt to be available?	This requirement refers to the capability of the system to generate and track read receipts for emailed invoices.

68	Appendix B- Slno:79, For the PCI compliance please confirm if the interface for payments receipts are listed in the Interfaces list worksheet	Yes, payment receipts are addressed in Appendix A Integrations tab.
69	Appendix B- Slno 109, Budgeting It is mentioned that active budgets need to be taken over in the Migration worksheet, however it was also mentioned that 2 years of historical budgets are also required, please help clarify the nature of information which needs to be taken over for the past 2 years i.e other than the active budget.	Final amended budgets for years 2 and older are required for archiving.
70	Appendix B-Slno 124: Ability to budget to the most granular level of the chart of accounts, please help clarify the granular information in the chart of accounts	The future state Chart of Accounts is expected to align with the Financial Accountability System Resource Guide (FASRG) standard account coding structure, however this design will be finalized with the selected vendor partner(s).
71	Appendix B-Slno 206: Ability to run depreciation at any time, please help clarify if this is only for simulation or to generate the postings as well	Bidders should articulate in the Comments field of their Appendix B response whether their proposed solution provides this functionality for simulation and/or posting.
72	Appendix B-Sl no344: Ability to change UOM is it prospectively or retrospectively as well in Inventory Adjustment?	The ability to change UOM prospectively only is required.
73	Appendix B- Slno 397: Ability to generate full bids based on the district Input and policies, are these available as standard templates?	It is expected that these would be generated based on district standard templates.
74	2 General Requirements- Can we propose a hybrid model with onshore (US) and offshore (India) resources for the implementation and support?	The district will consider proposals with this model, however the bidder must clearly detail what services will be provided onshore versus offshore in their submission.
75	Appendix B- Sl no147: Ability to manage multiple years of budget, please help clarify the number of years and their usage	The bidder should indicate the number of years that can be managed in their proposed solution in their response to this item.

76	2.4 Implementation Schedule- As asked during the pre-proposal call, if a proposer is unable to propose a schedule to meet the base go-live date and only proposes an alternative schedule, will the proposer be disqualified or penalized?	Please see Addendum #2 which clarifies the required project timeline for base and alternate bid proposals.
77	Appendix A Response Form- For the Effort Hours tab, is this for the base schedule? Can we duplicate the tab for the alternative option?	Yes, bidders should provide "Effort Hours" in Appendix A for BOTH the Base and Alternate bids. Please do this by simply duplicating the "Effort Hours" tab, as follows: Effort Hours - Base Effort Hours - Alt

EVALUATION POINTS FORM

	EVALUATION POINTS FORM	Assigned Points	Evaluation Criteria
	Parameters:		
1	**The purchase price**	**20**	• Initial license, implementation costs, upfront • Additional District costs (equipment, staffing,...) • Bundle/Box pricing and Module pricing • Proposed implementation hours included and costs of above hours
2	**The reputation of the vendor and of the vendor's goods or services**	**12**	• Company demographics, size, and financial stability • Number of K-12 installations - Texas, Nationally • Comparable GISD clients (Texas, ~50K students) • Length of time the product has been in the marketplace
3	**The quality of the vendor's goods or services;**	**15**	• Implementation approach (including timeline, project management, data conversion, training, vendor staff experience, etc.) • Number of contract exceptions • Ongoing support (Levels) • Support approach (including availability/hours, size of support team, etc.) • SLA - Uptime guarantee, incident management, notifications for maintenance • Mobile application • Updates - Research, development, upkeep for changing environments (when, how often)

4	**The extent to which the goods or services meet the district's needs**	25	Quality and clarity of response Functional: • General & module functional compliance • Reporting capabilities • Functionality/support for mandated reporting • Completeness of solution • 3rd party software solutions (number and quality of each) • Minimal Customization Technical • Current technology / Advanced technology • Use of industry standard tools • Security processes/procedures of the hosting provider • Compatibility with existing infrastructure/software • Integrated or best of breed solution
5	**The vendor's past relationship with the district;**	**3**	• Prior work with the District
6	The impact on the ability of the district to comply with the laws and rules relating to historically under-utilized businesses (HUB); **(must be 0 points)**	**0**	
7	**The total long-term cost to the district to acquire the vendor's goods and services;** 2-7 Years.	**25**	• Annual ERP maintenance and support (fixed and variable) • Seven year TCO • Equipment / hardware replacement (cost and support) • Staffing

			• Savings
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: A. Has its principal place of business in this state. B. Employs at least 500 persons in this state.	**0**	
	Total Points	**100**	
	PHASE 2		
	Best and Final Offer Costs	**35**	• 7 year TCO
	Results of Due Diligence	**25**	• Quality of demonstrations • Feedback from demonstration participants • Quality/relevance of reference clients • Feedback from reference clients • Quality and feedback from follow up activities
	Meets District Needs	**15**	• Additional information gathered during the proposal clarification process
	PHASE 2 TOTAL	**75**	

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor or other person doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. *See* Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

1   **Name of person who has a business relationship with local governmental entity.**

2   ☐   **Check this box if you are filing an update to a previously filed questionnaire.**

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3   **Name of local government officer with whom filer has employment or business relationship.**

_____

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

☐ Yes   ☐ No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

☐ Yes   ☐ No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

☐ Yes   ☐ No

D. Describe each employment or business relationship with the local government officer named in this section.

4

_____   _____

Signature of person doing business with the governmental entity   Date

Adopted 06/29/2007

Mayte R Martinez
Mayte R. Martinez
Assistant Director of Purchasing

_____
Company Name

_____
Address

_____
City   State   Zip

_____
Signature

_____
Title