Request For Proposals Addendum
Addendum #4: RFP Questions & Answers / Pre-Proposal PowerPoint Slides

Date: Monday, April 28, 2025

RFP #24-ERPS-0725 Texas ERP System

To: All Prospective Vendors

The following questions were sent in response to the referenced solicitation for further clarification. Questions and answers are listed below:

Question 1: Would IDEA be open to granting a two-week extension to the current RFP submission deadline?

Answer: At this time, IDEA will not be granting any extensions for the submission of proposals for RFP #24-ERPS-0725. The timeline for the RFP will remain as outlined on page 3 of the document.

Question 2: While the title and note on page 4 state this RFP is for TX, we wanted to clarify several lines in Attachment W that imply the system will be used in other states. Screenshot below:

26	Human Assets	Talent Management	Ability to provide demographic data for State Reporting	Essential
20	Payroll	Core Payroll	Ability to process multiple state new hire reporting and SSN verifications	Essential
4	Finanace	Financial Reporting	Ability to perform financial reporting to meet state reporting requirements	Essential
28	Human Assets	Core HR	Ability to provide state reporting for various states of operations with state approval of solution	Essential

Answer: RFP #24-ERPS-0725 Texas ERP System is only for Texas.

Question 3: Would the district please confirm if you are accepting an electronic RFP response in lieu of a shipped hard copy response?

Answer: Proposals may be submitted electronically utilizing Public Purchase or Tyler Munis Vendor Self-Service. Please refer to the section titled "Proposal Submission" on pages 3-4 of the RFP.

Question 4: IDEA has added the "Y-ND" code but has not provided a definition of that code. Can IDEA please clarify?

Answer: The definition of "Y-ND" can be found on page 13 of the RFP. Please be advised that this will be entered into column F.

> • For functionality that is not currently available and not available for viewing at a demo, but that will be in scope for the project either as generally available features in a future release or as a customization, modification, or enhancement specific for this project, Proposers should indicate a response code of Y-ND and answer column J.

Question 5: We still do not have the ability to add in supplemental information in the updated Attachment W. If we select "Y" we do not have the ability to add supplemental information (e.g., product module name). Where would IDEA like this information added? Can Attachment W be added with additional input columns so it is clear what information is being requested?

Answer: Respondents are now able to enter text directly into Column F. For example, if a respondent selects "Y" and wishes to include additional details, they may enter a response such as "Y – supplemental information abc" in Column F.

Question 6: Could you please clarify whether the district intends to review Student Information Systems (SIS) in addition to Enterprise Resource Planning (ERP) systems as part of this RFP, or if the focus is solely on ERP solutions? Industry best practices often recommend an integrated ERP/SIS platform to ensure a single source of truth and streamlined operations.

Answer: No, not at this time.

Question 7: Attachment L - Pricing Schedule and Attachment W - Functional Requirements does IDEA want them left in excel format or as an inserted PDF into the Section where it is being requested?

Answer: Please submit the attachments in Excel format.

Question 8: Attachment U in the RFP you request to be completed, but in the Excel you have the below:

"*IDEA Public Schools understands the level of effort required to convert data and is interested in converting only essential data required for the new system. Attachment U – Conversions (Reference Page) provides a list of systems/processes currently in use by IDEA. Attachment U – Conversions (Reference Page) shall be used as a reference page only; vendors are not required to complete and/or provide any information on this attachment.*"

Answer: Attachment U – Conversions (Reference Page) shall be used as a reference page only; vendors are not required to complete and/or provide any information on this attachment. IDEA Public Schools expects proposers to include all conversions listed in Part II – Scope and Specifications of the Proposal, Section K of the RFP. Explain any roles and responsibilities IDEA Public Schools are expected to provide for data conversions including (but not limited to) cleansing, uploading, testing, etc. within the proposal.

Question 9: Would IDEA like all the forms A-W under the one heading called Section 9 Forms or some in the designated spots where the forms are being discussed?

Answer: Please refer to *Part III – Proposal Submission & Requirements* for required proposal organization.

Question 10: Per subsection 4.2 on RFP pages 12-13, please clarify where vendors are to include comments regarding any letter code entries that require explanation. Can you provide an updated Attachment W with a comments column?

Answer: Respondents have the option to select from the drop-down list or type in their response in Column F. An updated Attachment W was provided via Addendum #1. Addendum #1 along with the updated Attachment W can be found utilizing the following links:

IDEA Website: https://ideapublicschools.org/our-story/finance-budget/pcs/bids-rfps/
Public Purchase: https://www.publicpurchase.com/gems/login/login

Tyler Munis Vendor Self-Service:

https://txselfservice.ideapublicschools.org/vss/Vendors/default.aspx

Question 11: Per subsection 5.7 on RFP pages 14, please clarify and explain whether or not Attachment U is required. There seems to be contradictory information with regard to this.

Answer: *Attachment U – Conversions (Reference Page)* shall be used as a reference page only; vendors are not required to complete and/or provide any information on this attachment. IDEA Public Schools expects proposers to include all conversions listed in *Part II – Scope and Specifications of the Proposal, Section K* of the RFP. Explain any roles and responsibilities IDEA Public Schools are expected to provide for data conversions including (but not limited to) cleansing, uploading, testing, etc. within the proposal.

Question 12: Please clarify if vendors are to complete/return the RFP Part V page (RFP page 18) with proposals, and how these are to be returned.

Answer: Yes. *Appendix A – RFP Submittal Checklist* also contains an area for respondents to answer the same question. The completion and submission of *Appendix A – RFP Submittal Checklist* is required to be submitted with proposals.

Question 13: Many different attachments are required to be completed and returned. These have only been provided in PDF. Can IDEA please provide editable Word versions of these forms/attachments?

Answer: All attachments within the RFP may be completed via Adobe. However, if your firm doesn't have access to Adobe licenses, please reach out to solicitations@ideapublicschools.org to request Word versions of the RFP attachments.

Question 14: Will the Attendance list be provided?

Answer: Yes. A copy of the Pre-Proposal presentation along with the attendance list are attached to this addendum. Any addendum issued by IDEA may be found utilizing the following links:

IDEA Website: https://ideapublicschools.org/our-story/finance-budget/pcs/bids-rfps/

Public Purchase: https://www.publicpurchase.com/gems/login/login

Tyler Munis Vendor Self-Service:

https://txselfservice.ideapublicschools.org/vss/Vendors/default.aspx

Question 15: Are there diversity or MWBE requirements?

Answer: No.

Question 16: Per page 4 of the RFP can you please confirm that the scope of this RFP is solely addressing schools in Texas, not additional states?

Answer: RFP #24-ERPS-0725 Texas ERP System is only for Texas.

Question 17: Do we provide just a code or comments or both on Attachment W?

Answer: Respondents may either select a code or type in a code with additional context in column F of Attachment W. For example, if a respondent selects "Y" and wishes to include additional details, they may enter a response such as "Y – supplemental information abc" in Column F. An updated Attachment W was provided via Addendum #1. Addendum #1 along with the updated Attachment W can be found utilizing the following links:

IDEA Website: https://ideapublicschools.org/our-story/finance-budget/pcs/bids-rfps/

Public Purchase: https://www.publicpurchase.com/gems/login/login

Tyler Munis Vendor Self-Service:

https://txselfservice.ideapublicschools.org/vss/Vendors/default.aspx

Question 18: Please provide the Texas student count.

Answer: 79,430 as of 24-25 Fall Snapshot.

Question 19: Is the sample contract referred to under Part V of the RFP, the "Purchase Order Standard Terms and Conditions"?

Answer: The general terms and conditions referenced and linked in *Part V - General Terms and Conditions Acknowledgement* are IDEA's Purchase Order Standard Terms and Conditions.

Question 20: Section 5.1 states that IDEA prefers proposers bid 2 options for the implementation plan. Attachment L (Excel pricing) only has one tab for implementation services costs. Does IDEA want to see pricing for both options or only the proposer's recommended option? If IDEA wants to see pricing for both options, should we duplicate that tab in attachment L? It would throw off the Summary tab if we did that. Please let us know how IDEA would like proposers to handle this.

Answer: Please submit two files called option 1 and option 2.

Question 21: To clarify, are digitally scanned signatures and/or DocuSign acceptable to be included in the Proposal Response?

Answer: Certified electronic signatures are accepted.

Question 22: (Page 4), Part 1 – Current Conditions/Background: To confirm that this RFP is only for goods and services provided to IDEA's Texas Based Charter School and Campuses which include the following Texas Districts, i.e., Rio Grande Valley, Austin, San Antonio, El Paso, Tarrant County, Greater Houston, and Permian Basin? Or Other States, i.e., Louisiana, Florida, or Ohio included as well?

Answer: RFP #24-ERPS-0725 Texas ERP System is only for Texas.

Question 23: Please provide the number of students for all of IDEA's Texas Based Charter School and Campuses that are included in this RFP.

Answer: 79,430 as of 24-25 Fall Snapshot.

Question 24: Is the District currently using a standalone Time/Attendance solution? If so, what provider and what version?

Answer: Yes, we are using Frontline Time and Attendance version X.

Question 25: What employee groups are required to utilize a Time/Attendance solution (i.e., certificated/classified/non-classified/union/non-union/other staff)? How many employees are in each group?

Answer: All hourly and bi-weekly extended employees and their managers.

Question 26: Will certificated staff be required to utilize a Time/Attendance system for any extra duty or overtime hours?
Answer: Yes.

Question 27: Will the District be utilizing physical Time Clocks? If yes, please provide the style and amount that you will be looking for (biometric, proximity, camera, etc.).
Answer: The district may decide to leverage physical time clocks. Please bid the various options for time clocks and the price. The total of clocks will range from 250-300.

Question 28: What type of badge is utilized for labor/trade staff? Proximity (RFID), Bar Code, Magnetic Strip?
Answer: None right now.

Question 29: Please provide clarity with regard to the "J. Interfaces" provision on page 8 of the RFP. The language states that interface requirements should be responded to, but no document for vendor completion seems to include interfaces requirements nor a letter code of "Y-ND."
Answer: Respondents may either select a code or type in a code with additional context in column F of Attachment W. For example, if a respondent selects "Y" and wishes to include additional details, they may enter a response such as "Y – supplemental information abc" in Column F. An updated Attachment W was provided via Addendum #1. Addendum #1 along with the updated Attachment W can be found utilizing the following links:

IDEA Website: https://ideapublicschools.org/our-story/finance-budget/pcs/bids-rfps/
Public Purchase: https://www.publicpurchase.com/gems/login/login
Tyler Munis Vendor Self-Service:
https://txselfservice.ideapublicschools.org/vss/Vendors/default.aspx

Question 30: Per RFP subsection 4.2, the language indicates that the Attachment W -
Functional Requirements document includes a "Y-ND" letter code. There is no such code in
the document. Please clarify/provide updated instructions for the completion of
Attachment W.

Answer: Respondents may either select a code or type in a code with additional context in
column F of Attachment W. For example, if a respondent selects "Y" and wishes to include
additional details, they may enter a response such as "Y – supplemental information abc" in
Column F. An updated Attachment W was provided via Addendum #1. Addendum #1 along
with the updated Attachment W can be found utilizing the following links:

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Tyler Munis Vendor Self-Service:
https://txselfservice.ideapublicschools.org/vss/Vendors/default.aspx

Question 31: The current schedule indicates that vendors will be notified of down-
selection on Thursday, May 22, with on-site demos scheduled for Tuesday, May 27 –
immediately following Memorial Day weekend. Given the short turnaround, would the
district consider providing demos scripts earlier that same week to allow vendors more
time to prepare, even if final down-selection hasn't yet occurred?

Answer: The evaluation period is tentatively scheduled to end on Tuesday, May 20, 2025.
Invitations are not able to be sent prior to the completion of evaluations.

Question 32: Due to the brevity of this request along with the detail involved we wanted to
make sure we have ample time to adequately fulfill your RFP. Would it be possible to
extend the due date by 2 weeks?

Answer: At this time, IDEA will not be granting any extensions for the submission of
proposals for RFP #24-ERPS-0725. The timeline for the RFP will remain as outlined on
page 3 of the document.

Question 33: What internal change management & training resources do you expect to have to develop/support/execute the deliverables for this initiative (i.e., stakeholder/readiness/change impact assessments, OC&T strategy/plan, communications plan, development of communications, change champion network plan/lead change champion network, training needs analysis, training curriculum plan, development of training materials, delivery of training, and post go-live sustainment planning)?

Answer: IDEA will leverage its Project Management Office (PMO) for change management and the communication department for communication of change. IDEA expects the vendor (implementor) to provide training in various training options and models. This can include optional training options and hours.

Question 34: How successful have your workforce transformation initiatives been in the past and how did they go? What change/training challenges have you experienced?

Answer: Each initiative has lessons learned. The projects have all gone into production. Training in a large spread-out organization is always a challenge, but we are looking for a vendor with experience with large geographically dispersed organizations.

Question 35: Has IDEA done any work around project governance, leadership alignment, readiness assessments? If so, please provide any pertinent information.

Answer: IDEA has a Project Management Office (PMO), and leadership stakeholders are aligned for this initiative.

Question 36: Have you identified the challenges and gaps with your current HR and Finance business processes? Have you documented all the touchpoints to processes outside of the system of record such as integrations, reports, or interpersonal communication?

Answer: The district has done due diligence. The discovery period of this initiative should determine this work. The district has provided conversion list and functional requirements that capture pain points as a requirement.

Question 37: Line 27 - Ability to perform R reporting and analytics. Is the assumption here that IDEA would output to Snowflake analytics, or if our solutions, would you output to a separate visualization platform?

Answer: We should be able to output to various other platforms.

Question 38: Do you intend to change your HR or Finance Service Delivery Model or Operational Model (reorganizing daily operations, addressing technology questions, managing technical changes) because of the implementation?

Answer: The district will align processes to have the best outcome with the selected platform.

Question 39: The RFP references a preference for "off-the-shelf" functionality. To confirm, is IDEA's intent to begin with baseline processes and only build additional functionality where truly necessary, avoiding overengineering the system?

Answer: Yes.

Question 40: Are there consistent business processes used across all IDEA schools, or do they vary by location?

Answer: Yes, there are consistent business processes.

Question 41: Does IDEA have any unions or collective bargaining agreements? If so, please tell us about any differences in operations they have (e.g. benefits, payroll, time-off plans).

Answer: No.

Question 42: Does IDEA workers perform multiple jobs in which each job has a different rate of pay?

Answer: Information regarding whether IDEA employees perform multiple roles with varying rates of pay is not addressed or required as part of this solicitation.

Question 43: Do you track both employees and contingent workers?

Answer: Yes.

Question 44: Do you self-administer leave of absence or have a third party administer? If you have an administrator, who is it?
Answer: Yes, we self-administer.

Question 45: How many accruing time off plans do you need configured? Example: PTO, Vacation, Floating Holiday, Sick Time.
Answer: Local Non-Year-Round, Local Year-Round, PTO and State.

Question 46: How many non-accruing (use as needed) time off plans do you need configured? Example: Bereavement, Jury Duty, Unpaid Time Off?
Answer: 22, Admin Leave Paid, Admin Leave Unpaid, Bereavement Local, Bereavement PTO, Bereavement State, Bereavement Unpaid, Field Lesson, FMLA Local, FMLA PTO, FMLA State, FMLA Unpaid, Jury, Military Local, Military PTO, Military Unpaid, Paid Family Leave, Staff Development, Susp Unpaid Leave, TX Donation Leave Bank, TX Sick Leave Bank, Unpaid Time Off.

Question 47: Do you allow the purchase, sale or donation of time off by employees?
Answer: Yes.

Question 48: Are there groups of employees with different benefit waiting periods?
Answer: No, there are not varied waiting periods. Benefits kick in the first day of the month following the employee's start date. For example, if the employee starts on 4/15, benefits become effective on 5/1.

Question 49: Please provide a list of all benefit plans (medical (BCBS), dental, insurance, life (MetLife), 401k, supplemental, RX, Pet insurance, etc.) and which vendor is utilized for each.

Answer:

Medical Insurance

- Medical Blue Cross Blue Shield of Texas

Spending Accounts:

- Dependent Care Account (DCA)

- Health Reimbursement Account (HRA) No new allocations

- Health Savings Account (HAS): Available only to those who are enrolled in the Green HDHP and choose to enroll in this account

- Flexible Spending Account (FSA)

Supplemental/Ancillary Plans:

- Dental

- Vision

- Short Term Disability

- Long Term Disability

- Voluntary Group Term Life

- Accidental

- Cancer

- Critical Illness

- Hospital Indemnity

- Emergency Ambulance

- Lifestyle Advantage

- Universal Life

Question 50: How many pay frequencies do you have? (Weekly, Bi-Weekly, Semi-Monthly, Monthly)?

Answer: Two: Biweekly and Monthly.

Question 51: How many pay groups do you have?

Answer: Salaried, True Hourly, Extended Hourly and In-House Substitute.

Question 52: How many earnings codes do you have? How many deduction codes?

Answer: 160 Earning Codes & 360 Deduction Codes.

Question 53: Please provide Payment Count per Pay Cycle (if an Employee has a Direct Deposit for Savings & Checking, this would be considered two payments).

Answer:

o Weekly: N/A

o Biweekly: Approximately 4,800

o Semi-monthly: N/A

o Monthly: Approximately 6,700

Question 54: Number of FEINS? (Assumed only Texas, but if otherwise, states (per FEIN)? Locals (per FEIN)?

Answer: Only 1 in Texas.

Question 55: How many Garnishments do you pay per pay cycle?

Answer: Biweekly: Approximately 160; Monthly: Approximately 170.

Question 56: Anticipated number of W2s to be printed? Anticipated number of 1095Cs to be printed?

Answer: Over 14,000 W2s & Over 13,000 1095Cs.

Question 57: How many Benefit Eligible Employees? How many FSA Accounts? How many HSA Accounts? How many Commuter Accounts?

Answer: Currently, total eligible employees are 9,936 for IDEA Texas.
HSA- ~563

FSA- ~2391
Commuting Accounts – 0

Question 58: Do you track confidential job requisitions?

Answer: Not applicable.

Question 59: Do you utilize recruiting agencies that would need access to the ERP system? If so, how many?

Answer: Not currently.

Question 60: How many unique offer letters are required? What are the differences between them?

Answer: 4 Campus versus HQ roles primarily.

Question 61: Please tell us about your need to convert active candidates. Historical candidates?

Answer: Convert both active and historical candidates.

Question 62: Which employees will use Time Tracking (hourly, salary or both)?

Answer: Hourly with manager approval.

Question 63: Does IDEA intend to utilize new ERP clock in/out or time entry functions or will you use a third-party clock system, which will need integrated into the new EPR system? If a third-party, which vendor?

Answer: This will be based on what is bid as options. The district is open to leveraging native or partner time clock options.

Question 64: Approximately how many time entry codes do you have?

Answer: 6: Regular, GAP, Overtime, Double Time, and Exception Under, Calamity Paid.

Question 65: Subsection: Core Finance - Number: 27: There is a request for the ability to show numeric values beyond a billion digits – for clarification, is this in reference to a dollar amount or one billion datapoints?

Answer: This is in relation to numerical dollar amounts.

Question 66: Number of Financial Institutions that you bank with?

Answer: For Texas, IDEA banks with two financial institutions.

Question 67: How many Company Consolidations do you have, and how many levels?

Answer: In regard to financials, we do consolidate and have IDEA and Midland within the same ERP system.

Question 68: How many Fiscal Schedules do your Companies use?

Answer: One.

Question 69: Subsection: Core Procurement - Number: 30: Ability to maintain a catalog & kits – what types of kits are your teams typically building? New student? Teacher? Other? What types of items and what frequency are these kits built and replenished?

Answer: Anything your firm would consider a standard kit for Public Charter School Systems.

Question 70: Do you currently use a T&E Card? If so, please explain the process.

Answer: No.

Question 71: Do you utilize any 3rd party booking agencies for expenses/procurement?

Answer: Yes.

Question 72: Do you use any form of P-Card? If so, who is it with and how many cards? Is the liability corporate or personal?

Answer: Yes, we use P-Cards through American Express. The number of cards is estimated to be in the thousands.

Question 73: Do you utilize any form of Supplier Portal?

Answer: Yes.

Question 74: Number of open Supplier Contracts?

Answer: 3000+.

Question 75: How many punchouts will you utilize / need (above and beyond Amazon, Staples, Home Depot, and Lowes)?

Answer: Between 5 and 10.

Question 76: Ability to search and filter potential grant opportunities based on criteria – is this related to pre-award grant proposal tracking or searching grants already awarded to the organization?

Answer: Both.

Question 77: Tell us about your grant processing, including number of grants/awards, number of sponsors, do you perform effort certification, etc.

Answer: At this time, we do not have this information readily available. If selected as a finalist, we will be happy to provide additional details regarding our grant processing, including the number of grants/awards, sponsors, and effort certification practices.

Question 78: Briefly describe key challenges with your current budgeting process.

Answer:

Easy End-User Data Entry Challenge:

Ensuring that end-users can easily input data without encountering difficulties or errors in the system.

Quick Reporting Challenges:

- Producing real-time or near-real-time reports for decision-makers and stakeholders in a timely manner.
- Budgeting by function in current system from the beginning, giving user access to do in system, instead of manual imports.
- Live Scenario Planning needed for key assumptions, i.e if we want to do a 1% pay adjustment instead of 2 it takes a whole refresh to do it.

- Current system is not used for budget planning. We use ADP and excels then upload data entry to current system. We would like the ERP system to have a full budget planning module so end users can create their budgets in software and for there to be a review approval process.

- Most budgets are provided through excel outside of the current system. Tracking budget by proforma categories is difficult since the proforma/master budget categories are not entered in the current system. Historical information by enterprise budget is compiled outside of the current system. Lack of systems generated approval process at multiple levels.

- Overlap of future positions and pending vacancies; salaries & fringe estimates until start of year.

- Position historical, tracking pending hires/fills, Reporting actual filled salaries and vacant positions cost in one report.

Question 79: Is your planning done through a centralized group/organization (i.e. Finance Department) or a decentralized process (i.e. Cost Center Owners)?
Answer: It's a combination of both. Some budgets are planned internally while others are led by individual budget owners.

Question 80: Do all your entities consolidate into a single parent and single set of financial statements?
Answer: No.

Question 81: What are the models in your current budgeting/forecasting process (i.e. Revenue, Expenses, Capex, Workforce)?
Answer: Revenue, Position Control, Operating Expense by cost center and local account segment, Capital Expenditures, Staffing/Per Pupil Allocations, District & Regional Reservations.

Question 82: Roughly how many calculations for each of your budgeting/forecasting models?

Answer: More than 10,000 on the big model about 5,000 on the mini models.

Question 83: How many years or periods of historical actuals does your budgeting/forecasting process reference?

Answer: Should be 3 previous and up to 5 in the future at least the model can go to 30 to match.

Question 84: Do you plan for a Statement of Net Position and/or Cash Flow Statement?
Answer: Yes.

Question 85: Do you plan for Intercompany Eliminations?
Answer: This RFP is only for Texas which is a single entity. There is no child company.

Question 86: Do you allocate expenses or revenue?
Answer: Yes, both.

Question 86: Can you provide some examples of the metric projections to be collected through a budget planning workflow process?

Answer: Staffing all base pay and non-base pay, benefits, taxes etc., Line-item expenses, revenue, cost center Sustainability, enrollment, by cost center, by regions, ADA, Per pupil allocations driven by enrollment & eco dis counts for grants.

Question 87: Can you elaborate on what the routing of budget for approval process looks like?

Answer: Yes, expenses for positions across multiple accounts.

Question 88: Do you have reason to plan across multiple currencies? If so, please elaborate.

Answer: No.

Question 89: Do your budgeting/forecasting results need to be sent to any alternate systems (i.e. Power BI, Tableau)?
Answer: Yes, Power BI but should have capabilities for future needs and software.

Question 90: Will IDEA be able to assist with building integrations and participating in integration knowledge transfer with system implementer support?
Answer: Yes.

Question 91: What is Rapid Identity used for? It mentions Authentication, but isn't Azure used for authentication as well?
Answer: Rapid Identity is our cloud SSO application for IDP for SAML authentication.

Question 92: What is intended to be the source system for worker photos (new ERP system or Raptor)? Would photos be sent from the new ERP system to Raptor or vice versa?
Answer: The flow should be the new ERP and out into all other systems.

Question 93: For the file storage integration, is it expected that files will be exported from new ERP system and sent to file storage, and also vice versa? What types of documents would this involve?
Answer: The new ERP should have document management capabilities. The district may leverage a 3rd party document management platform to integrate with the ERP.

Question 94: In section 5.1, it says "IDEA prefers that proposers bid two (2) options". Is IDEA expecting two separate pricing workbooks (excel) for these or should we combine in the same pricing workbook?
Answer: Yes, please create two workbooks.

Question 95: We understand the RFP requests both a fixed fee and a breakdown of hours and rates. As a standard practice, our fixed-fee proposals are based on defined scope and deliverables, rather than hourly rates or time estimates. This allows us to stay focused on outcomes and ensures pricing predictability for our clients. Should we update the pricing workbook to allow for a manual entry of the one-time cost instead of using the formula-driven format?

Answer: The tab for implementation services heading may say one-time cost, but if you put the expected hours and rate then we will know that this is time and effort. We would expect implementation hours to a bucket of hours with the expected cost per hour.

Question 96: For travel and expenses, we typically include an estimated percentage of the total project cost to support planning. The specific number and timing of on-site visits are finalized post-contract, once we've aligned on project needs and cadence. Please let us know if this approach suffices for your planning and evaluation needs.

Answer: The form asks for specific trips, but you can do bucket and put the amount as you see fit.

Question 97: We request clarification on the dates surrounding potential dates following the invitation to request to demonstrate. May 27th is listed as the Software & Implementation Presentation date. We assume that our team would need to be available for on-site meetings in Weslaco between Tuesday, May 27 and Friday, May 30th for demonstration and follow-up Discovery sessions. Would these dates potentially stretch into the week of June 2nd?

Answer: The dates will not extend past May 29th for demonstrations and May 30 for discovery if needed.

Question 98: Do the "finalist" vendors have the ability to request more time to demonstrate and discuss their solutions and implementation proposals? Our team collectively shares the concern that several hours/half day is not nearly enough time to demonstrate a solution encompassing the requested solutions. If selected to demonstrate

in late May we ask for more time (1-2 days) to enable your team of stakeholders the appropriate time to validate the proposed solutions.

Answer: Unfortunately, there will not be any additional time. The time limit will be set based on the number of finalists.

Attachments:

Pre-Proposal Attendance list

Pre-Proposals Meeting PowerPoint Slides

End of Addendum

RFP #24-ERPS-0725 Texas ERP System
Pre-Proposal Meeting

Date: Tuesday, April 22, 2025 @ 11:00AM CST
Location: Microsoft TEAMS

Attendance:

Representative Name:	Title:	Company:	Email:	Phone Number:
Marlon Shears	CIO	IDEA Public Schools	Marlon.shears@ideapublicschools.org	
Delilah Veliz	Procurement Analyst	IDEA Public Schools	Delilah.veliz@ideapublicschools.org	
Mia Harris	Assistant Director of Procurement	IDEA Public Schools	Mia.harris@ideapublicschools.org	
Haritha Dasari	Director of Business Information Systems	IDEA Public Schools	Haritha.Dasari@ideapublicschools.org	
Inez Vela	Managing Director of Data and Business Applications	IDEA Public Schools	inez.vela@ideapublicschools.org	
Rachael Frum	Sr. Manager, Bids & Proposals	PowerSchool	Rachael.Frum@powerschool.com	
Ryan Betzing	Industry Sales Executive	Oracle	Ryan.Betzing@Oracle.com	325-374-2751
Dan Terrell	Solutions Director - ERP	Frontline Education Inc.	dterrell@frontlineed.com	
Arpit Shastri	Client Partner	Tech Mahindra	Arpit.Shastri@techmahindra.com	224 616 7440
Steven Woodcock	Nonprofit Financials Specialist	Workday	steven.woodcock@workday.com	207-286-6115
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Jake Gross	SLED Professional Services	Workday	jake.gross@Stradaglobal.com	816-918-5719
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Ali Hanousek	Regional Sales Manager	Cognizant	ahanousek@collaborativesolutions.com	(480) 688-7189

Lauren Hale	Sales Account Executive	OneSource Virtual (Workday Partner)	Lhale@onesourcevirtual.com	207-712-4011
Billy Lewis	Sr. Account Mgr.	Public Sector Infor	billy.lewis@infor.com	214-405-7583
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Sean McGrath	Solution Consulting Manager	Oracle	sean.mcgrath@oracle.com	602-793-0374
John Murrin	Director	CherryRoad Technologies	jmurrin@cherryroad.com	781.910.6209
Stacy Smith	Proposal Manager	Workday	Stacy.smith@workday.com	
Alex McKinnis	Senior RFP Specialist	Frontline Education	FrontlineRFP@frontlineed.com	866-504-8222
Monica Pettiette	Proposal Manager	Focus School Software	monicap@focusschoolsoftware.com	727-388-3300
Kelly Schlaefer	RFP Team Manager	Skyward, Inc.	kellys@skyward.com	715-972-4494
Sourabh Sharma	Consultant	HCLLP	sourabh.sharma@harshwal.com	1-858-788-2175
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Harsh kapoor	RFP Analyst	InfoStride, Inc.	harsh.kapoor@infostride.com	
Jeff Keller	Account Representative	Tyler Technologies	Jeff.keller@tylertech.com	

Sandy Kaufman		AST, an IBM Company	skaufman@astcorporation.com	949-244-3773
Ben Erwin	Business Analyst	App Maisters	ben.erwin@appmaisters.com	(281)-299-3152 (888)391-8184 ext. 108
Paul Smith		Frontline Education	psmith@frontlineed.com	925 963 6378
Nitin Bhushan	Sr. Business Analyst			

Pre-Qualification Agenda

- Welcome
- Agenda & Solicitation Overview
- Proposal Submission & Selection
- Project Scope and Overview
- Q&A
- Wrap-up

Point of Contact (POC)

All inquiries regarding this solicitation should be directed to IDEA's:

Procurement Department

solicitations@ideapublicschools.org

Disclaimer

- This Document serves to aid interested vendors doing business with IDEA. This Document does not constitute legal advice or bind IDEA in any manner. Anything stated at this pre-submittal conference is not intended to change any terms and/or conditions stated in the advertised solicitation document. Any authorized changes will be made in writing in the form of an Addendum issued by IDEA Procurement Department.
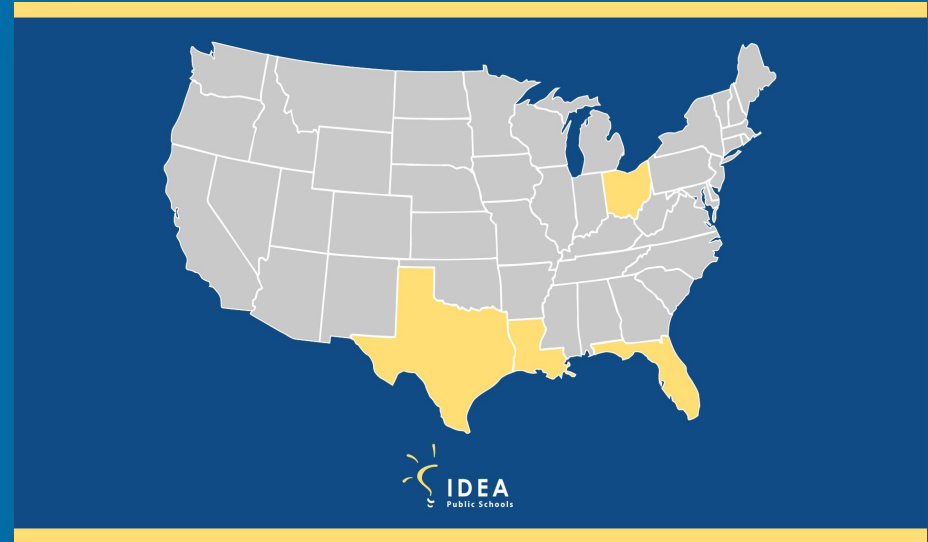
Solicitation Overview

Purpose: The purpose of this Request for Proposal (RFP) is to solicit proposals from software vendors, systems integrators, and/or Value-Added Resellers (VARs) who can demonstrate that they possess the organizational, functional and technical capabilities to provide an Enterprise Resource Planning (ERP) Software solution that meets the needs of IDEA Public Schools (IDEA).

⚠️ *IDEA reserves the right to accept all or part of any proposal and/or scope of work, at its sole discretion. Additionally, IDEA retains the right to modify the scope of work as deemed necessary to meet its objectives.*

The detailed scope of work can be found in __Part II – Scope and Specifications of the Proposal__.

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Solicitation Overview Continued

Respondents must follow the format instructions detailed in *Part III – Proposal Submission & Requirements* when preparing and submitting a Proposal. Each section of the proposals must be clearly marked.

⚠️ Failure to follow all the proposal's organizational requirements may result in disqualification.

Appendix A – RFP Submittal Checklist

The documents below are required for proposal submission to be considered complete. Failure to submit the required documents may result in a proposal being deemed nonresponsive. Please refer to **Part IV – Proposal Submission & Requirements** for required format and structure of proposals.

☐ Introductory Materials

☐ Executive Summary

☐ Disclosure Statement

☐ Scope of Services

☐ Functional Requirements

☐ Implementation Plan

☐ Ongoing Support and Hosting Services

☐ Sample Documents

☐ Attachment A: Cover Page

☐ Attachment B: Vendor Acknowledgement

☐ Attachment C: Insurance or Bonding Requirements; Certificate of Insurance (COI)

☐ Attachment D: IDEA Conflict of Interest Form

☐ Attachment E: Texas Ethics Commission Form CIQ

☐ Attachment F: Felony Conviction Disclosure Statement

☐ Attachment G: Certification Regarding Lobbying

☐ Attachment H: Contract Provisions Regarding Contracts Involving Federal Funds

☐ Attachment I: Reference Sheet

☐ Attachment J: Recent and Ongoing Projects

☐ Attachment K – Litigation, Terminations, Claims

☐ Attachment L – Proposed Pricing

☐ Attachment M – IRS Form W-9

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Attachment L – Proposed Pricing

Respondents <u>must</u> provide pricing referencing: "***ATTACHMENT L – Proposed Pricing***" in their submitted Proposal.

Requirements to be included on proposed pricing can be found on pages 14-15 of the RFP.

⚠️ **Pricing <u>must</u> be submitted utilizing IDEA's "Attachment L". Submissions provided in any alternative format will not be reviewed.**

Attachment U –Conversions (Reference Page)

Attachment U – Conversions (Reference Page) shall be used as a reference page only; vendors are not required to complete and/or provide any information on this attachment.

System / Process	Interaction Direction	Type of Data	In Scope	Out of Scope	Description / Note
ACH File	OutBound	Payroll Fullfilement	X		
BCBS	OutBound	Employee Benefits	X		
MetLife	OutBound	Employee Benefits	X		
Azure AD	Bidirectional	Demographic data, email, user ID, business phone	X		ERP system will be system of record for people data
Rapid Identity	Bidirectional	Authentication	X		
Banks	??	??			Assumption bank statements / files for reconciliation
Comp Analysis	Bidirectional	Market Data	X		
TBD		Employee Benefits	X		457, 403(b)
Cornerstone	Inbound	Performance Managemnt		Replace	ERP will be source of Performance Management. Need to bring in historical information
Adobe Sign	Bidirectional	Signature	X		
TBD	Bidirectional	checks	X		What company do we do background checks with?
Raptor	Bidirectional	Demograpic and Photos	X		Badge System
ServiceNow	Bidirectional	Onboarding	X		
ServiceNow	Bidirectional	Offboarding	X		
PEIMS	OutBound	State Reporting	X		
TRS	OutBound	Pension	X		
Suppliers	Bidirectional	Punchouts	X		Amazon, Staples, Home Depot, Lowes
File Storage	Bidirectional	Document Management		Replace	Enterprise Document Management or ERP internal document storage
FrontLine		Substitute Placement		Replace	
Learn 360	Bidirectional	Learning Management		Possible Replace	This can be a replacement if ERP does learning management and meets the needs of organization. Else will need to be integrated.
Compass	OutBound	Report		Replace	Historical glance at employee performance, ratings
Qualtrics	OutBound	AEES / Surveys		Replace	

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Attachment W – Functional Requirements

Attachment W – Functional Requirements describes the software and implementation scope of the overall project and the requirements for each functional area.

Responses are to be entered in column F of the Excel document.

⚠️ Details regarding functional requirement responses and codes can be found on *Part III – Proposal Submission & Requirements, Section 4* of the RFP.

Functional Requirements Responses	
Column F: Available Responses **(to be completed by Respondent)**	
Y	Requirement Met and Proposed
N	Requirement Not Met with Proposal
I	Need more information
S	Requirement met with custom development / configuration
TP	Requirement met with third-party solution
NS	Requirement not supported

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Request for Proposals Tentative Timeline

Timeline:

All dates and times are tentative and subject to change.

First Advertisement Date/Issue Date:	Wednesday, April 9, 2025
Second Advertisement Date:	Wednesday, April 16, 2025
Pre-Proposal Meeting:	Tuesday, April 22, 2025, at 11:00AM CST
Respondent Question Cut-Off Date:	Wednesday, April 23, 2025, at 12:00PM CST
Addendum Issue Date:	Friday, April 25, 2025
Proposals Due by Date & Time:	Monday, May 12, 2025, at 12:00PM CST
Anticipated Evaluation Period:	May 15, 2025 – May 20, 2025
Invitation for Request to Demo:	Thursday, May 22, 2025
Software Demo & Implementation Presentations:	Tuesday, May 27, 2025
Discovery Sessions (Optional)	Friday, May 30, 2025
Anticipated Board Meeting & Approval:	July 2025
Initial Proposed Contract Term:	July 2025 (term TBD upon award)
Renewal(s):	TBD (subject to mutual agreement)

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Submittal Procedures

Due: Monday, May 12, 2025 @ 12:00 PM CST

Proposal Submission: Proposals may be submitted using [Public Purchase](), [Tyler Munis Vendor Self-Service](), or by sending one (1) clearly identified hard copy ORIGINAL of the Proposal to:

IDEA Public Schools

RFP #24-ERPS-0725 Texas ERP System

Attn. Purchasing Department

2115 West Pike Blvd

Weslaco, TX 78596

Proposals must be in a sealed envelope <u>marked with the RFP Number and Title (24-ERPS-0725 Texas ERP System)</u> and include:

1. One (1) clearly identified hard copy ORIGINAL of the Proposal.
2. One (1) copies of the Proposal on a FLASH DRIVE, marked with the Respondent's name.

Proposals MUST be organized as specified in *Part III – Proposal Submission & Requirements* and received by IDEA <u>no later than 12:00PM CST on Monday, May 12, 2025</u>, as outlined in the RFP timeline. Failure to do so may result in the proposal not being considered.

⚠️ **RFP submissions must follow the format instructions detailed in *Part III – Proposal Submission & Requirements* when preparing and submitting a Proposal. Each section of the proposals must be clearly marked.**

Evaluation Criteria

Points	Evaluation Criteria
30 Points	Cost Proposal
30 Points	Functionality
15 Points	Technical Components
15 Points	Implementation Services/Approach
10 Points	Experience
100 Points	Total Possible Score

⚠️ A detailed explanation of the evaluation criteria can be found on **Part IV – Evaluation Criteria** of the RFP.

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Closing

If you haven't already, please type name, title, contact information, and organization in the chat