

Regional School District No. 8
Central Office
85 Wall Street
Hebron, CT 06248

**Request for Proposal
For
Enterprise Resource Planning (ERP) System**

Proposal Due Date: March 8, 2019

Proposal Due Time: 9:45 AM

Regional School District No. 8
85 Wall Street
Hebron, CT 06248

NOTICE TO PROPOSERS
PROPOSAL #2018-101

Regional School District No. 8, of Connecticut hereby invite the submission of sealed proposals from qualified Enterprise Resource Planning (ERP) system companies beginning July 1, 2019. Forms for proposal, certification, conditions, specifications, and any addenda may be obtained at the Regional School District No. 8 website, which is <http://www.rhamschools.org>.

Any deviations from these conditions or specifications must be listed on a separate sheet attached to the Proposer's detailed conditions and specifications and referred to separately in the proposals. In all cases not indicated by the Proposer as a deviation, it is understood that the conditions and specifications of the each of the aforementioned public schools shall apply. Proposals will be received until **9:45 AM on March 8, 2019** at Regional School District No. 8, Central Office, 85 Wall Street, Hebron, Connecticut 06248, at which time and place all proposals will be publicly opened. Interested Proposers are required to attend a **mandatory pre-proposal conference will be held on January 18, 2019 at 11:00 AM** at RHAM High School, Principal Meeting Room.

Proposals will remain firm for a period of 90 days following the date of the opening, and shall thereafter remain firm until the Proposer provides written notice to the Regional School District No. 8's Business Office that the proposal has been withdrawn.

Regional School District No. 8
Hebron, Connecticut

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Section A - Announcement

Announcement
Request for Proposals,
Enterprise Resource Planning (ERP) System

With this request for proposals (RFP), the Regional School District No. 8 (District) hereby solicits submissions of written proposals (Proposals), from qualified companies (Respondents) to provide for the District services described herein, all in accordance with the terms and conditions detailed herein. ***In particular, the services sought by the District will require the Respondent to:***

Provide proposals for supplying an Enterprise Resource Planning (ERP) System, to include a Human Capital Management (HCM) and Financial Management (FIN) software to the District. Specifically, our goal with this solicitation is to:

- Identify the software product that best fits our goal of maximizing the Recruiting, Selecting, Retaining and providing of Customer Service to our existing and potential employees.
- Procure an ERP system that is commensurate with our size and complexity.
- Identify the software product whose internal practices best match our business practices.
- Identify a software program that provides self-service functionality for employees to review paychecks, request leave, report time, enroll and change benefit elections, review balances and change personal data.
- Identify a software program that will provide the District with delivered business intelligence, and the capacity to create customized dashboards.
- Identify a software program that will pay employees and vendors through ACH or EFT quickly and accurately and limits the need for costly manual retroactive payments and rework.
- Identify a software program that allows for real-time data extraction, data drilldown and combining and reporting of HCM and FIN information to facilitate data-driven decision-making process.
- Identify a software program that will leverage delivered and customized workflow to reduce manual handoffs and increase accountability.
- Identify a software program that will allow for a seamless integration process for time clock, attendance, and sub calling system.
- Identify a software program that will incorporate student activity funds as well as private, federal and state grant funds.
- Create a business process structure that will encourage the consistent adherence to state and federal reporting requirements and regulations.
- Identify an implementer with extensive K-12 expertise, functional expertise, software expertise, and benchmark capacity to guide us through an implementation.
- Identify an implementer that will provide us with training.
- Identify a software and implementation partner that will grow stronger in the time after a successful implementation.

Regional School District No. 8 reserves the right to reject or accept any or all Proposals submitted. Regional School District No. 8 shall have the right to consider factors other than the proposal response in awarding a contract. Regional School District No. 8 reserves at its sole discretion, the right to award this contract as deemed to be in the best interest of the District.

I. Introduction

Regional School District No. 8 is a public school system located in Tolland County in the State of Connecticut and services students from the towns of Hebron, Andover and Marlborough who attend a comprehensive and progressive middle and high school. Also known as RHAM (Regional Hebron, Andover and Marlborough).

RHAM middle school enrolls 469 students in grades 7 through 8 and RHAM high school enrolls 1013 students in grade 9 through 12.

II. Background

Regional School District No. 8 has a budget of approximately \$29,000,000 and employs approximately 250 permanent employees.

The back office is comprised of a business manager, director of accounting/benefits coordinator, accounts payable and payroll. Accounting services is responsible for all the fiscal services for the District. Human Resources is located in the central office and is shared between the superintendent and her administrative assistant. Workflow and absence tracking is not centralized in either of these departments.

Currently, the District is trying to move to a less manual process for all the steps involved from applying for job openings, to onboarding, to benefits enrollment, to time and attendance. As well as purchase requisitions and payments for purchases. Ideally, being able to batch scan invoices into the FIN system would be the ultimate goal.

Currently, the District utilizes the following software systems to support Finance, Procurement, Payroll and HR:

- Phoenix – Sunguard K-12 Education GAS
- Phoenix – Sunguard Pentamation HR/Personnel
- Frontline – Absence management and sub-calling system
- Frontline – Recruitment
- BSwift – Benefit enrollment
- My School Pay – On-line payment and receipt system
- EPES – Student Activity Fund software
- Heartland & My School Bucks– cafeteria software and payment system
- My Learning Plan
- Powerschool SIS
- School Messenger – website and emergency notifications

III. Timeline

The following chart illustrates important dates throughout the RFP process:

Date	Milestone
January 9, 2019	RFP Release
February 15, 2019	Vendor Questions last day
February 20, 2019	Vendor Question Response Addendum
March 8, 2019	RFP Closes
March 8, 2019	Evaluations of Proposals & Sealed bids
March 13, 2019	Vendor notification of finalists and non-finalists
March 18, 2019	Vendor demonstration
March 29, 2019	Final selection and negotiation process
May 20, 2019	Board Approval

IV. Submission of Proposals

Proposals will be accepted until **9:45 AM on MARCH 8, 2019 PROPOSALS RECEIVED AFTER THIS TIME WILL NOT BE ACCEPTED.** One (1) original, one (1) USB (with Proposal formatted into a single pdf file), and three (3) hard copies of your proposal must be submitted.

Proposals are to be formatted such that any requested information is provided within sections delineated by the Tab Name, or in the specific formats provided within the document. It is expected that all proposals submitted would be in accordance with what has been clearly outlined in the RFP. Once a bid proposal has been submitted it is final. The time allotted for questions will be from the date you receive the RFP to the date stipulated in this request.

Respondents shall be responsible for any and all expenses that they may incur in preparing proposals or in making presentations. Once you have completed your proposal, your signature or that of a duly authorized individual of your company must be affixed, in order for us to acknowledge the fact that you have read the RFP thoroughly and have completed the proposal within the stipulated guidelines.

Proposals must be sealed in a container should be clearly labeled **“Enterprise Resource Planning (ERP) System RFP”**. **FAXED RESPONSES WILL NOT BE ACCEPTED.** All completed Proposals and accessory documents should be mailed or delivered to:

Eva Gallupe
Regional School District No. 8
Central Office
85 Wall St
Hebron, CT 06248

Section B – Scope of Services

I. Scope of Services

The District is interested in purchasing and implementing a complete ERP System beginning July 1, 2019. We are proposing going live on January 1, 2020.

The following are modules or functionality that we are considering for purchase with this RFP. We may ultimately choose to purchase some or all of these modules. However, your final written proposal should assume that we will implement the following:

Functionality	Priority
Human Resources	High
Recruitment	High
Benefits Administration	High
Payroll	High
Time and Attendance	High
Absence/Leave Management w/sub-calling	High
Position Management	High
Position Budgeting	High
Certification Tracking	High
Professional Development	Low
Employee Self-Serve	High
General Ledger	High
Purchasing	High
Accounts Payable	High
Accounts Receivable	High
Financial Reporting	High
Budget/Forecasting	High
Asset Management	High
Retiree/Cobra Billing	Low
Student Activity Accounting	High
Cloud Based/SaaS Hosting Model	High
Batch Scanning Invoices	High
State of Connecticut EFS coding	High

II. Format of Proposal

The Proposal submitted by the Respondents must contain the following information:

Tab 1 Executive Summary

The Proposal will include an executive summary from the vendor(s), briefly discussing the history of your firms(s), address(es), and how long the firm has been providing the specified service. Also in this section, give an overview of your proposed services, highlighting aspects of the proposal which make it superior or unique in addressing the needs of the District.

Tab 2 Statement of Work

The Proposal will include a Statement of Work detailing the approach and scope that are a part of your proposed price. At a minimum, the following topics are required:

- Overview of the Solution
 - Proposed version number of ERP software
 - Number of months since the release of that version
 - Mention of timing of next version release
- General Implementation Approach
- Project Management and Project Approach
- Project Implementation Methodology
- Project Deliverables and Deliverable Timeline
- Project Detailed Approach and Scope
 - Modules
 - Setup and Installation
 - Integration with external systems
 - Report and Dashboard Development
 - Security/Role Configuration
 - Data Conversion and Migration
 - Project Team Training
 - End-User Training
 - System Testing
 - Parallel Testing
 - Go-Live Cutover
 - Quality Assurance/Quality Control
 - Knowledge Management
 - Change Management
 - Risk Management
 - Items/Module/Services Not in Scope
- Division of labor and responsibilities between District personnel and Consulting resources
- Consulting/Implementation Fees including hourly rate for additional services not included in quote as a part of the fixed fee contract
- Change Order process
- Other Terms and Conditions

Tab 3 Cost and Return of Investment

Proposals must provide the District a pricing based on the requirements and terms found in the RFP. Pricing must be all-inclusive and cover every aspect of the Project to include hardware, software, maintenance, implementation, training, travel and expense, and post go-live support. Offers must describe the cost benefit realized by implementing the proposed solution. Please include upgrade timing and costs for a 10-year time frame. Full costs associated with support and maintenance for the next 10-years shall also be included.

Tab 4 Customer Base and References

Each Respondent must provide a list of at least three K-12 entities of similar size within the State of Connecticut that have purchased and are using your ERP software that we may contact as a reference check.

Tab 5 ERP Project Plan

Each Respondent must include a high level ERP Implementation Project Plan and Timeline illustrating the project phase and milestones. This is meant to show your methodology and illustrate to the District on how the proposed timeline will unfold and succeed. To that end, please keep this plan to the major milestone level, but include all facets of the implementation.

Tab 6 Consultants Resume

Based upon the list of project members provided in the cost proposal, please include the resumes for your proposed implementation team or team that is representative of the experience you intend to provide.

Tab 7 Hardware Configuration and Recommended Architecture

The Respondent is being asked to define pricing for your recommended hardware and infrastructure configuration for a school district of our size and with our current transaction volume. The cost of your recommended hardware configuration will be a factor in our determination of the overall cost solution.

Tab 8 Third Party Products

To the extent that a Third-Party Product is proposed with your solution, the Software Provider shall explicitly state the name of any third-party products. For each third-party product, proposals must include a statement surrounding whether the Software Provider's contract will encompass third-party product and/or whether the District will have to contract on its own for the product. The District prefers that the Vendor serve as the administrator for all third-party software contracts.

Finally, the Vendor shall provide proof that they have access to the third-party Software Source Code (own or in escrow) and that the Vendor has the ability to provide long-term support for the third-party Software and hardware components of their System.

Also indicate any products or modules, if any, that require a separate architecture, database instance, database type, or operating system.

Tab 9 Supplemental Information

A statement regarding previous experience, if any, in providing "Services" to Regional School District No. 8

Any other relevant information about the proposed Services deemed to be material.

Section C – Instruction to Respondents

I. Purpose

Regional School District No. 8 (District) hereby solicits submission of written proposals (Proposals), from qualified companies (Respondents) capable of providing the scope of products or services described in Section B hereof (Services). These instructions provide detailed legal and technical requirements for the acquisition of the Services. This Request for Proposal (RFP) will become part of any final contract entered between the District and the Respondent for the provision of the Services.

II. Period of Contract Performance

The period of performance for the Services to be provided to the District by the Respondent as a result of this RFP and any resulting contract or agreement shall be as agreed and/or negotiated. The contract or agreement resulting from this RFP shall also contain a provision granting to the District the right to terminate the Agreement, with or without cause upon thirty days' notice.

III. Minimum Standards

The successful contractor shall be capable of providing the Services in accordance with the minimum standards, specifications and performance requirements, as well as in accordance with all of the terms and condition stated in this RFP. The standards, specifications, performance requirements, terms and conditions set forth in this RFP reflect the primary considerations of the District concerning minimum services and capabilities expected, but may not necessarily reflect all the services and capabilities required. Additional standards, specifications, performance requirements, terms and conditions may be set forth in the final contact. In this regard, the successful contractor shall furnish all management and resources (including but not limited to personnel, technical support, computerized and other systems support, equipment, materials and miscellaneous supplies) necessary to provide the Services in a thorough, comprehensive, timely, efficient and effective manner.

IV. Specifications

The Respondent, if and when it is awarded a contract, shall provide all the Services described in Section B of the RFP, entitled "Scope of Services".

V. Proposal Preparation and Submission Requirements

General Requirements: In order to be considered for selection, successful Respondents must submit a complete response to the RFP. One (1) original, one (1) USB (with Proposal formatted into a single pdf file), and three (3) hard copies of your proposal must be submitted. No other distribution of the Proposal shall be made by the Respondent. Proposals submitted telegraphic or facsimile will not be considered.

Signatures; Completeness: Proposals shall be manually signed by an authorized representative of the Respondent. The printed name and title of the person signing the Proposal must appear on the signature page of the Proposal. Proposals must concisely set

forth all of the information requested by this RFP in a full, accurate and complete manner, including all required attachments. If any required information is not contained in the Proposal, the Proposal will be considered non-responsive and, consequently, will not be considered.

Simplicity: Proposals should be prepared simply and economically, providing a straightforward, concise description of the Respondent's capability of satisfying the requirements of this RFP. Emphasis should be on completeness and clarity of content. Responses should focus on efficient and cost effective systems, which ensure cost management, timely services and minimized paperwork.

Binding: All documentation submitted with the Proposal should be contained in that single volume.

Place and Time for Submission: Proposals will be received by the District at its Central Office located at 85 Wall Street, Hebron, CT 06248, until **9:45 AM LOCAL TIME ON MARCH 8, 2019 (THE SUBMISSION DEADLINE). PROPOSALS RECEIVED AFTER THIS DATE AND TIME WILL BE REJECTED.**

Delivery: All proposals shall be deemed received when delivered to the above address. Each Respondent is solely responsible for ensuring its Proposal is delivered on time. Any Respondent who relies on overnight delivery services, the United States mail, private mail services, local couriers or any other delivery service remains solely responsible for the timely delivery.

Receipt by the District: Upon receipt, all Proposals will be date and time stamped. Respondents are reminded that all Proposals must be securely sealed and clearly marked.

Pricing: Pricing information shall be provided on the pricing schedule form attached to this RFP. In determining its pricing proposal, the Respondents should take into account that the District is a tax-exempt entity and, as such, is exempt from the paying sales and use taxes.

Duration of Validity: Proposals shall be valid for a minimum period of six (6) months subsequent to the Submission Deadline. Proposals expiring less than six (6) months from Submission Deadline will be considered non-responsive and, consequentially, will not be considered.

VI. Evaluation Process

The Proposals will be evaluated by a committee, that will evaluate the submissions and recommend one for a final contract.

Initial Selection: The ERP selection committee will review proposals that are submitted on time. Only proposals deemed to be compliant and capable of meeting the District's needs will be selected for interviews and demonstrations. The District ERP selection committee will choose two or more vendors to move to finals on or around. The selection committee

reserves the right to choose the ultimate number of finalists based upon the proposals received.

Finalist Presentation: Invited vendors will be given the opportunity to demonstrate their software in person to the selection committee. The District will schedule an on-site vendor demonstration for the week of March 18, 2019. Vendors will be responsible for conducting software demonstrations that address key business processes affecting HCM and FIN modules.

Evaluation Criteria: The selection committee will use the “Forced Ranking” methodology to rank vendors. The selection committee will be instructed to rank the most qualified vendor as #1, based upon the rubric below.

Factor	Percentage Weight
Strength of System Implementer	30%
Software Functionality	25%
Total Cost of Ownership	25%
Ability of District to maintain solution	10%
Reputation of Vendor and Financial Stability	5%
Risk Mitigation	5%

- **Strength of System Implementer** – The District will give preference to:
 - a. K-12 experience as a company and as reflected in the individual consultant resumes submitted by vendors.
 - b. Demonstration of methodology grounded in strong project governance including vendor provided templates.
 - c. A proposed methodology that is uniquely suited to the challenges of implementing an ERP in a K-12 environment.
 - d. A proposed approach that focuses on constant knowledge transfer with onsite consulting resources.
- **Software Functionality** – The District has evaluated business process deemed pertinent to this selection.
- **Total Cost of Ownership** - software and hardware costs to support the software
- **Ability to Maintain Solution** – Determining the “footprint” of the solution and how much back office IT support is required.
- **Industry Reputation and Financial Stability** – The District will give highest priority consideration to vendors who are strong in K-12 as well as those who have an established local and regional public sector client base. Vendors must prove they are financially solvent and able to continue a relationship with the District for many years.
- **Risk Mitigation** – Implementation projects are risky. A clear and demonstrable understanding of these risks and how to mitigate them in our environment is essential, and will be emphasized in all phases of the selection process.

VII. General Terms and Conditions

No Commitment: This RFP does not commit the District to award a contract, pay any costs incurred in the preparation of any Proposal submitted, procure or contract for Services from any Respondent or any other person. Accordingly, each Respondent shall be responsible for all costs incurred in the preparation and submission of its Proposal or in any part of its participation in the pre-award process.

Conditions and Assumptions: All Proposals and related documents shall be based on the same conditions and assumptions that will underlie any prospective final contract between the District and the successful Respondent. Thus, in establishing the terms of any resulting contract, the District may assume the conditions and assumptions underlying the Proposal submitted by the successful Respondent are accurate.

Termination: Failure by the successful contractor to comply with the terms and conditions of this RFP or to deliver the Services identified in this RFP or the contract at the prices quoted shall void the contract award. In the case of the successful contractor's failure to deliver the Service in accordance with the contract terms and conditions, the District, after due oral or written notice, may procure such Services from other sources and hold the successful contractor responsible for any resulting additional purchase and administrative costs. If termination is due to the successful contractor's failure to the right to seek reimbursement of all or portions of payments made to the contractor.

Ethics in Public Contracting: By submitting its Proposal, Respondent certifies that its Proposal is submitted without collusion or fraud, that it has not offered or received any kickback or inducement from any other Respondent, supplier, manufacture subcontractor, customer or other person in connection with its Proposal and that it has not conferred in any advance, deposit of money, employment, service or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

Prohibited Contract: Registered and non-registered lobbying of the District staff members or Board members with respect to pending project or award is prohibited during the time period between the date the RFP is advertised and the date a final contract is awarded. **ANY CONTACT BETWEEN DISTRICT STAFF MEMBERS OR BOARD MEMBERS AND ANY REPRESENTATIVE OF A RESPONDENT RELATING TO A PENDING PROJECT OR AWARD (WHETHER BY WRITING, TELEPHONE, E-MAIL OR OTHERWISE) OUTSIDE OF PROPERLY SCHEDULED MEETINGS, OTHER THAN AS INTENDED AND INITIATED BY A DISTRICT STAFF MEMBER, SHALL BE GROUNDS FOR DISQUALIFICATION ON THE RESPONDENT FOR THE PROCESS.** By submitting a Proposal, the Respondent represents and warrants that it has not made, and will not make, any contact prohibited by this paragraph.

Conflict of Interest: Respondent certifies that no District Board member, staff member or any District employee has a financial or beneficial interest in the Respondent.

Section D - Appendix

System Pricing Form

Authorization

Signature of Authorized Company Representative

Please type the following:

Name of Authorized Representative: _____

Employer Identification Number: _____

Company Name: _____

Street Address: _____

City, State, Zip Code: _____

Signature of Authorized Representative: _____

Date: _____

Notarization

My being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this _____ day of _____, 2019

Notary Public:

Signature: _____

Name (Printed) _____

My Commission Expires: _____

(Notary Seal)