

# **ERP (Enterprise Resource Planning) Financial/HR Management Solution RFP-21-17-18**

## **Pre-Proposal Conference**

April 17, 2018



**EAST SIDE**  
HIGH SCHOOL DISTRICT  
*Silicon Valley*

# ERP (Enterprise Resource Planning)

## Agenda:

1. Welcome and Introductions
2. Pre-Proposal Conference Logistics
3. Project Scope
4. General Submittal Requirements
5. Submission Checklist
6. RFP Documents Anticipated to be Provided
7. Responses to Functional/Technical Requirements
8. Tentative Procurement & Implementation Schedule



# Introduction of Team Members

- Randy Phelps - Chief Technology Officer
- Robert Chen - Systems and Programming Supervisor
- Mac Cage - Assistant Director Information Technology and Computer Support
- Marcus Battle - Associate Superintendent of Business Services
- Cari Vaeth - Associate Superintendent of Human Resources
- Janice Unger - Director of Purchasing & Capital Accounting
- Silvia Pelayo – Director of Finance
- Julie Kasberger – Director of General Services
- Julio Lucas – Director of Facilities, Construction, Maintenance/Operations



# Pre-Proposal Conference Logistics

- The conference is non-mandatory, answers provided to written questions presented prior to and at the pre-proposal conference will be distributed to the audience as well as electronically in an addendum following the conference.
- Sign in so we have evidence of your attendance – Please leave a business card.



# Project Scope

ESUHSD is looking for a solution that integrates the following modules:

|                     |                           |
|---------------------|---------------------------|
| General Ledger      | Personnel                 |
| Budgeting           | Time & Attendance         |
| Accounts Payable    | Benefits Administration   |
| Accounts Receivable | Payroll                   |
| Purchasing          | Employee Self Service     |
| Stores/Warehouse    | HR/Position Control       |
| Fixed Assets        | HR/Personnel Requisitions |



# General Submittal Requirements:

- E-mail is the preferred means of correspondence for submitting any questions requiring the RFP. (Janice Unger, [ungerj@esuhsd.org](mailto:ungerj@esuhsd.org))
- All offers received by the time and date specified will be opened at the appointed time and checked for the presence of all required information.
- One (1) electronic copy must be submitted containing the entire contents of your proposal. In addition, Ten (10) hard copies shall be submitted to the address shown below:

Janice Unger

Director, Purchasing & Capital Accounting

East Side Union High School District

830 N. Capitol Avenue

San Jose, California 95133

E-mail: [ungerj@esuhsd.org](mailto:ungerj@esuhsd.org)

Phone: 408-347-5079



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# Submission Checklist

Please use the following checklist to ensure that you are submitting a complete proposal. Additionally, please ensure that all electronic files are clearly identified with your business name and address:

- One (1) copy of the entire proposal submitted on electronic media.
- Ten (10) bound copies of the proposal (including hard copies of costs and requirement responses), presented in a professional manner.
- Consultant Info-Signature submitted on the form supplied in this RFP
- Conflict of Interest submitted on the form supplied in this RFP
- Non-Collusion Declaration submitted on the form supplied in this RFP
- Iran Contracting Act Certification submitted on the form supplied in this RFP
- Vendor references submitted on the form supplied in this RFP (Appendix D).
- Microsoft Excel spreadsheet containing staffing loading matrix.
- Microsoft Excel spreadsheet containing cost estimates.
- Microsoft Excel/Word documents containing functional requirements responses (Appendices A, B and C).
- Microsoft Excel/Word document with any Written Exceptions to the Specifications.



# RFP Documents Anticipated to be Provided:

- A. Addendum No. 02 – Revised RFP-21-17-18 and answers to questions submitted as well as verbally asked at the pre-proposal conference.
- B. Appendix C – Position Control, Payroll and Personnel Functional Requirements – Revised
- C. Agreement – Exhibit A





# Responses to Functional/Technical Requirements

(Proposal Section 5.0) Responses to the requirements listed in Appendix A, B and C to this RFP must be provided in this section of the proposer’s proposal.

The following answer key must be used when responding to the requirements. Proposers must use one code only per requirement:

|   |  |
|---|--|
| Y | Yes, the software provides this functionality.   |
| N | No, the software does not provide this functionality.  |
| C | The software can be customized via software modification to provide this functionality. Provide cost estimate in the “Comments” section. |
| T | Third Party Software required to fully provide requirement.  |



# Tentative Procurement & Implementation Schedule

| Date                             | Activities  |
|----------------------------------|---|
| April 02, 2018                   | RFP distributed   |
| April 11, 2018 by 5:00 p.m. PST  | Deadline to email District with confirmation of intention to respond to RFP |
| April 17, 2018 at 11:30 a.m. PST | Pre-Proposal Conference   |
| April 19, 2018 by 5:00 p.m. PST  | Deadline for submitting questions to District regarding RFP                 |
| April 24, 2018 by 3:00 p.m. PST  | Date by which District will post final responses to questions regarding RFP |
| April 30, 2018 by 3:00 p.m. PST  | Deadline to submit proposals  |
| W/E May 11, 2018                 | Target date for District's proposal review                                  |
| Week of May 14, 2018             | Anticipated interview(s) and demonstration(s):                              |
| W/E May 25, 2018                 | Anticipated District selection of proposal                                  |
| June 21, 2018                    | Board of Trustees Approval at Regular Scheduled Board Meeting               |
| July 01, 2018                    | Implementation Start-up (approximately)                                     |
| January 01, 2019                 | Go live - run (2) systems simultaneously (6 month trial)                    |
| July 01, 2019                    | Start running new system successfully                                       |



# Questions?



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