RICHARDSON INDEPENDENT SCHOOL DISTRICT

Finance/HR/Payroll System

Request for Competitive Sealed Proposals (RFCSP)

# 1521

June 2018
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GENERAL TERMS AND CONDITIONS
1 GENERAL REQUIREMENTS

1.1 OVERVIEW

Richardson Independent School District is located in Dallas County, Texas, and serves over 39,000 students in 61 buildings. Richardson Independent School District (hereafter referred to as “RISD” or “District”) is seeking to replace its current Finance/HR/Payroll system. The District is currently using Oracle E-Business Suite, which is located on-premise at the District. Richardson Independent School District is seeking proposals for SaaS (subscription-based) or on-premise (perpetual license) Finance/HR/Payroll solutions.

1.2 INTENT

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

1.3 SCHEDULE OF EVENTS

<table>
<thead>
<tr>
<th>EVENT</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFCSP Released</td>
<td>June 7th, 2018</td>
</tr>
<tr>
<td>Vendor Pre-bid Conference Call</td>
<td>June 14th, 2018 at 10:00 AM CT</td>
</tr>
<tr>
<td>Deadline for submittals of questions related to this RFCSP</td>
<td>June 21st, 2018 at 12:00 PM CT</td>
</tr>
<tr>
<td>Contacts: <a href="mailto:melody.greig@risd.org">melody.greig@risd.org</a> and <a href="mailto:christopher.carr@plantemoran.com">christopher.carr@plantemoran.com</a></td>
<td></td>
</tr>
<tr>
<td>Deadline for Proposals &amp; Public Proposal Opening</td>
<td>July 11th, 2018 at 1:30 PM CT</td>
</tr>
<tr>
<td>Vendor Demonstrations</td>
<td>Week of August 27th, 2018</td>
</tr>
<tr>
<td>Anticipated award date</td>
<td>November 5, 2018</td>
</tr>
<tr>
<td>Implementation Schedule</td>
<td>January 1, 2019 – December 31, 2020</td>
</tr>
<tr>
<td>Performance Management/Appraisals Go-live:</td>
<td>July 1, 2019</td>
</tr>
<tr>
<td>Applicant Tracking/Recruiting Go-Live:</td>
<td>July 1, 2019</td>
</tr>
<tr>
<td>Finance Go-Live:</td>
<td>July 1, 2020</td>
</tr>
<tr>
<td>HR/Payroll Go-Live:</td>
<td>October 1, 2020</td>
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</tbody>
</table>

1.4 DEADLINE FOR PROPOSALS

Late proposals will not be accepted. Proposals shall be submitted as follows:
(1) Printed Signed Original
(1) Unbound printed copy
(5) Printed bound copies
(1) Thumb drives consisting of three files:

1) One single scanned PDF file of the submitted printed signed proposal including all Appendices, plus one electronic copy each of Appendix A & Appendix B in Excel format marked with company name to:

Client: Richardson Independent School District
Street: 1123 S. Greenville Ave.
City, State, Zip: Richardson, Texas 75081
Attention: Ms. Melody Greig

All proposals must be in a sealed package and contain the wording "Richardson Independent School District Finance/HR/Payroll System" on the package. The wording "ORIGINAL" is to appear on the outside of the binder containing the original signed proposal. Proposals may not be delivered via facsimile or email.

Please note that the Richardson ISD Purchasing Department office will be closed from June 22nd – July 9th. If vendors wish to hand deliver their responses, the office will reopen July 10th at 8:00 AM. Mailed copies will be accepted at 1123 S. Greenville Ave. Richardson, TX 75081.

All proposals MUST be recorded on the proposal response sheets provided in this RFCSP document; supplemental line-item pricing information should be provided and referenced on the response sheets, but only numbers on the Proposal Summary Form, found in Appendix A1 will be recorded at the bid opening.

1.4.1 Intent to Respond

Each Proposer who intends to submit a Proposal in response to this RFCSP may submit, via email, an "Intent to Respond" to: Melody Greig at melody.greig@risd.org and Gina Mancinelli at gina.mancinelli@plantemoran.com with the subject line "Intent to Respond – RISD Finance/HR/Payroll System-[insert your company name]." Please refer to section 1.6 for the contact information to address specific questions related to this RFCSP.

The Intent to Respond shall include the name of the Proposer, the name of the contact person, and that person's email address. RISD and Plante Moran intend to communicate with Proposers via email, including with respect to RFCSP clarifications and addenda. Those Proposers who fail to properly provide an Intent to Respond are not precluded from bidding; however, they will be solely responsible for obtaining any such information in an alternative manner.

1.4.2 Proposals shall be accompanied by a sworn and notarized statement disclosing any familial relationship that exists between the Proposer or any employee of the Proposer 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 Familial Form must accompany your bid proposal (see Appendix A).

1.5 VENDOR’S PRE-BID CONFERENCE CALL

Prospective Vendors are strongly encouraged to attend a pre-bid conference call that is scheduled as indicated in Section 1.3. In advance of the meeting, vendors should notify the contact listed in Section
1.6, indicating intent to attend. Additionally, vendors are strongly encouraged to submit questions prior to this call.

The dial-in number for this call is as follows:

Phone Number: 877.917.5761
Passcode: 9419904

The dial-in option is limited to 40 participants on a first come basis. Vendors are requested to only have one contact call in (or multiple contacts at the same location) in order to allow everyone to participate.

1.6 BID CLARIFICATIONS

Requests for clarification shall be submitted in writing by email only to the following recipients:

Melody Greig, Director of Purchasing | Richardson ISD
Melody.greig@risd.org

Christopher Carr | Plante & Moran, PLLC
Christopher.carr@plantemoran.com

When making requests for clarification, please identify the relevant section number (e.g., section 2.3.1). Any answers furnished that change or substantially clarify the bid will be confirmed in writing to all other known bidding parties.

1.7 PROPOSAL FORMAT

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

1.7.1 Executive Summary

The Executive Summary should at a minimum highlight how the proposed solution achieves the objectives of the District. This letter is to be signed by an officer of the organization submitting the proposal.

1.7.2 Proposal Overview

a) Company background and local branch organization support
b) Implementation Plan (refer to Section 2.8 for all required components)
c) Hardware / Technical Overview
   i. Overview of environment – SaaS or Premise, including description of any equipment and network requirements
   ii. Technical Requirements including listing browsers supported, plug-ins and version numbers and any client software required
   iii. System Performance
   iv. List of all interfaces between proposed system and other K12 administrative systems in use at the District
   v. Overview of hosting / cybersecurity environment and included services
   vi. Ongoing Support & Maintenance
   vii. Hosting & Cybersecurity Environment
   viii. Copy of standard support SLA
d) Roadmaps
   i. Application Development Roadmap
   ii. Technical Architecture Roadmap
   iii. Current Architecture Diagram

e) Staffing Plan

f) Full Texas Client List

1.7.3 Project Plan

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

1.7.4 Product Information

The Vendor must include a description of application software, including points of integration between modules, as well as copies of the technical specifications/data sheets for each of the module/application being proposed.

1.7.5 Vendor Response Forms

a) Vendor Response Forms (Appendix A). In addition to requesting information on your company, you must clearly indicate whether you either comply or take exception to any of the sections in this RFCSP. All vendors MUST submit the form Comply/Exception Form from Appendix A. Where applicable, an explanation to the exception must be provided including any exception to the best practice workflows in Appendix C.

b) Completed Pricing Forms (Appendix A) must be provided.

c) Responses to all Application Software Requirements (Appendix B) must be provided. Specific statements concerning those areas where the proposal differs from the specifications should be presented. Software modification costs required should be estimated in the bidder response forms in the Appendices.

d) Additional required in Appendix A2 (listed below) must be provided.
   a. Form A: Certificate of Residency
   b. Form B: Criminal History Certification
   c. Form C: Minimum Insurance Requirements
   d. Form D: Deviations
   e. Form E: Federal Vendor Certifications

1.7.6 Additional Information

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

1.8 MODIFICATION OF RFCSP

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

1.9 CONFIDENTIAL INFORMATION

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

1.10 RIGHT TO REQUEST ADDITIONAL INFORMATION

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

1.11 RIGHT OF REFUSAL

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

1.12 PROPOSAL PREPARATION COSTS

The vendor is responsible for any and all costs incurred by the vendor or his/her subcontractors in responding to this request for proposal.

1.13 PRICING ELIGIBILITY PERIOD

All vendor proposal bids are required to be offered for a term not less than 150 calendar days in duration. A claim of mistake in computation of a proposal shall not void the proposals after they are opened and accepted.

1.14 CONTRACT PERIOD

The contract award resulting from this Request for Proposal shall be five years. The District reserves the right to modify the contract term based on the final solution.

1.15 ADDITIONAL CHARGES

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

1.16 TURNKEY SOLUTION

All prices quoted must include all application, report writing, database and utility software subscriptions / licensing, consulting, training, configuration, implementation, design, information gathering, testing and hosting services, related hardware, etc. that will be necessary to make the system specified fully operational for the intent, function and purposes stated herein. These costs must be included in the base bid. ALL hardware and prerequisite software for the appropriately sized server environment proposed must be proposed; no assumption should be made as to existing licenses within the local District network environment. Note – for on-premise solutions, vendors must identify all server /storage equipment and operating system software necessary including detailed specifications but do not need to include associated pricing.
1.17 FEDERAL OR STATE SALES, EXCISE, OR USE TAXES

Richardson Independent School District is a tax-exempt entity for all purposes except if the project makes enhancements, and/or additions to real property.

1.18 CONTRACT REQUIREMENTS

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

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

A. IDENTIFICATION OF PARTIES TO THE AGREEMENT CLAUSE

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

B. ENTIRE AGREEMENT CLAUSE

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

C. AGREEMENT EXTENSION AND MODIFICATION CLAUSE

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

D. TERM OF THE AGREEMENT CLAUSE

The term of all licenses and support agreements shall be clearly identified in the contract, but shall not be for less than one (1) year from the effective date.

E. APPLICABLE AND GOVERNING LAW CLAUSE

The Agreement shall be subject to all laws of the Federal Government of the United States of America and to the laws of the State of Texas. All duties of either party shall be legally performable in Texas. The applicable law for any legal disputes arising out of this contract shall be the law of (and all actions hereunder shall be brought in) the State of Texas, and the form and venue for such disputes shall be of the appropriate district, county or justice court.
F. COMPLIANCE WITH FEDERAL, STATE, AND LOCAL REGULATIONS

The proposed solution must comply with all federal, state, local and where applicable, international laws and regulations including, but not limited to: PCI-DSS, state and federal reporting, HIPAA/HITECH, GDPR, ACA, and PEIMS reporting.

G. NOTICES CLAUSE

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

1) Actually received, or
2) Upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the party, or
3) If not actually received, 10 days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the respective other party at the address set out in the section of the Agreement titled "Identification of the Parties to the Agreement" or such other address as the party may have designated by notice or Agreement amendment to the other party, or
4) Upon delivery by the District of the notice to an authorized Vendor representative while at the District site.

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

H. SURVIVAL CLAUSE

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

I. FORCE MAJEURE CLAUSE

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

b) Force Majeure Requisites

Force majeure shall not be allowed unless:

A. Within three (3) calendar days of the occurrence of force majeure, the party whose performance is delayed thereby shall provide the other party or parties with written notice explaining the cause and extent thereof, as well as a request for a time extension equal to the estimated duration of the force majeure events.

B. Within seven (7) calendar days after the cessation of the force majeure event, the party whose performance was delayed shall provide the other party written notice of the time at which force majeure ceased and a complete explanation of all pertinent events pertaining to the entire force majeure situation.

c) 120-Day Maximum

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

d) Right of Cancellation

Either party shall have the right to cancel the contract Agreement if Force Majeure suspends performance of scheduled tasks by one or more parties for a period of one hundred-twenty

(120) or more days from the scheduled date of the task. If a cancellation due to a Force Majeure occurs before title passes to the District, the Vendor may keep any parts of the system as it can salvage, but must remove same at its own expense. If cancellation occurs due to a Force Majeure after title passes to the District, the system shall remain with the District and the Vendor shall be entitled to any such payments as have accrued according to the payment schedule.

J. INCORPORATION BY REFERENCE

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

K. NON-WAIVER OF AGREEMENT RIGHTS

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

L. GENERAL INDEMNIFICATION

The Vendor agrees to indemnify, hold harmless and defend the District, its Board and its Board members, in their official and individual capacities, its successors, assignees, employees, contractors and agents from and against any and all claims, costs, expenses, damages, and liabilities, including reasonable attorney’s fees, arising out of the negligent act or willful misconduct of the Vendor, its officers, directors, employees and agents, (ii) any breach of the terms of this Agreement by the Vendor or (iii) any breach of any representation or warranty by the Vendor under this Agreement. The District agrees to notify Vendor by certified mail, return receipt requested, immediately upon knowledge of any claim, suit, action, or proceeding for which it may be entitled to indemnification under this Agreement. Vendor shall have the sole right, but not the obligation, to control the defense of any such claim. The District agrees to provide reasonable assistance to Vendor, at Vendor’s expense, in defense of same.

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

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

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

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

N. PAYMENT TERMS

The District intends to adhere to milestone payments for services including a holdback to be paid at time of Acceptance of the system. The District intends to negotiate a payment schedule for initial licensing and/or subscriptions (will not be 100% within 30 days of contract execution).

O. NONDISCRIMINATION BY VENDORS OR AGENTS OF VENDOR

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

P. SUBCONTRACTORS

Vendors may use subcontractors in connection with the work performed under this Agreement. When using subcontractors, however, the Vendor must obtain written prior approval from the District for activities or duties to take place at the District site. In using subcontractors, the Vendor agrees to be responsible for all their acts and omissions to the same extent as if the subcontractors were employees of the Vendor.

Q. EFFECT OF REGULATION

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

R. ASSIGNMENTS

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

S. WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE

The District has presented detailed technical specifications of the particular purpose for which the software and equipment is intended. The District has provided detailed descriptions and criteria of how the system can be defined to accomplish particular purpose. The District has also defined the exact procedures and techniques to be employed in testing whether the system has achieved the defined performance of this particular purpose. Given this advanced preparation concerning, and documentation about the District's particular purpose, the Vendor at the time this Agreement is in force has (1) reason and opportunity to know the particular purpose for which products are required, and (2) that the District is relying on the Vendor's experience and knowledge of these products to provide those which are most suitable and appropriate. Therefore, the Vendor warrants that the system is fit for the purposes for which it is intended as described in this document.

T. WARRANTY

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

U. NON-COLLUSION COVENANT

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

1.19 PROJECT MANAGEMENT STAFF DESIGNATION

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

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

1.20 VENDOR AS INDEPENDENT CONTRACTOR

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

1.21 INSURANCE

**Workers’ Compensation Coverage:** The Vendor shall procure and maintain during the life of this contract, Workers’ Compensation Insurance, including Employer’s Liability Coverage, in accordance with all applicable statutes of the State of Texas.

**Commercial General Liability Insurance:** The Vendor, at the Vendor’s sole cost and expense, shall procure and maintain during the life of this contract, Commercial General Liability Insurance on an “Occurrence Basis” with limits of liability not less than one million dollars ($1,000,000) per occurrence and/or aggregate combined single limit, Personal Injury, Bodily Injury, and Property Damage. Coverage shall include the following features: (A) Contractual Liability; (B) Products and Completed Operations; (C) Independent Contractors Coverage; (D) Broad Form General Liability Extensions or equivalent; (E) Deletion of all Explosion, Collapse and Underground (XCU) Exclusions, if applicable; (F) Per contract aggregate.

**Motor Vehicle Liability:** The Vendor, at the Vendor’s sole cost and expense, shall procure and maintain during the life of this contract, Motor Vehicle Liability Insurance, including applicable No-fault coverages, with limits of liability of not less than $1,000,000 per occurrence combined single limit Bodily Injury and Property Damage. Coverage shall include all owned vehicles and all hired vehicles.

**Cyber Liability:** The Vendor, at the Vendor’s sole cost and expense, shall procure and maintain during the life of this contract Cyber Liability Insurance with limits of liability of not less than $1,000,000 per occurrence or claim. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Vendor in this agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide first-party and third-party coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

**Additional Insured:** The following shall be named Additional Insureds: Richardson Independent School District, and including all elected and appointed officials, all employees and volunteers, all boards, commissions and/or authorities and their board members, employees, and volunteers.
This coverage shall be primary to the Additional Insureds, and not contributing with any other insurance or similar protection available to the Additional Insured, whether other available coverage be primary, contributing or excess.

**Notice of Cancellation or Change.** Workers’ Compensation Insurance, Commercial General Liability Insurance and Motor Vehicle Liability Insurance, as described above, shall include an endorsement stating the following: Sixty (60) days Advance Written Notice of Cancellation or Non-Renewal shall be sent to: Richardson Independent School District, 1123 S. Greenville Ave., Richardson, TX 75081.

**Proof of Insurance Coverage:** The Vendor shall provide the District at the time the contracts are returned for execution, Certificates of Insurance and/or policies, acceptable to the District, as listed below:

a. Two (2) copies of Certificate of Insurance for Worker’s Compensation Insurance;

b. Two (2) copies of Certificate of Insurance for Commercial General Liability Insurance;

c. Two (2) copies of Certificate of Insurance for Vehicle Liability Insurance;

d. Two (2) copies of Certificate of Insurance for Cyber Liability Insurance;

e. Original Policy, or binder pending issuance of policy, for Owners Contractors Protective Liability Insurance;

f. If so requested, certified copies of all policies shall be furnished.

**Continuation of Coverage.** If any of the above coverage expires during the term of this contract, the Vendor shall deliver renewal certificates and/or policies to Richardson Independent School District at least ten (10) days prior to the expiration date.

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

**1.22 FINAL ACCEPTANCE OF THE SYSTEM**

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

**1.23 STANDARD FORMS AND CONTRACTS**

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

**1.24 ADVERTISEMENT**

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

The District intends to enter into a long term relationship with a well-established vendor whose products, features, design philosophy and support policies come closest to meeting the District's needs. The selected vendor must be a well-established, financially stable firm committed to technology in K12, will have a commitment to attracting and retaining an excellent staff of technical and product support personnel, and will have a proven track record of support from installation planning through implementation and ongoing use. There should also be evidence of responsiveness to clients’ suggestions for improvements. Finally, there must be a good fit between vendor staff and the District’s staff to assure a good working relationship.

The Vendors will be evaluated based on the following selection criteria:

- Vendor fit
- Technical solution
- Compliance with functional requirements
- Cost, both initial and ongoing

1.26 SPECIAL NOTES

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

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

1.27 REJECTION OR AWARD OF CONTRACT

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

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

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

1.28 CRIMINAL BACKGROUND SCREENING

It is the District’s policy not to have individuals with a criminal history working on the District’s projects. The District reserves the right to require a criminal background check or drug screening for any contractors at the vendor’s expense. If background checks or drug testing has already been performed by the Vendor, that existing documentation will be sufficient as long as it complies with State of Texas requirements. Selected vendor must have background checks performed and results sent directly to the District.
PROJECT REQUIREMENTS & SPECIFICATIONS
2 GENERAL REQUIREMENTS

2.1 INTENT

Richardson Independent School District is currently using Oracle E-Business Suite version 12.1.3 for finance, HR and payroll. RISD also utilizes a number of third-party systems, including, but not limited to the following:

<table>
<thead>
<tr>
<th>System</th>
<th>Purpose</th>
<th>Seeking Replacement?</th>
<th>Interface Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>EZChildTrack</td>
<td>Student payments for before/after school services</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>RevTrak</td>
<td>Student payments for AP examination fees, summer school fees, misc. other student fees</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>PayPams</td>
<td>Student nutrition payments</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Governmental Data Systems (GDS)</td>
<td>Online property tax billing and collections</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>TMA Systems</td>
<td>Work order and facilities/maintenance/custodial management system</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Kronos</td>
<td>Time &amp; Attendance</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>AppliTrack</td>
<td>Applicant Tracking</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Emphasys Investment Management/Treasury Desktop</td>
<td>Investment portfolio accounting, reporting and analysis</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>BMC Remedy</td>
<td>Fixed Assets</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

As the District continues to streamline and optimize operations and is more reliant on data for decision-making, this system is no longer meeting needs. The District intends to replace this system with a system that is capable of providing improved efficiency, as well as the additional reporting and visibility the District now requires. Richardson Independent School District is seeking proposals for SaaS or on-premise Finance/HR/Payroll solutions.

2.2 SCOPE

Richardson Independent School District requires that responding vendors propose a complete solution, including software, project management, and other technology services for the scope of the project that vendor is bidding (e.g., if vendor is bidding on all except Reporting, the remaining modules must be turnkey).

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

<table>
<thead>
<tr>
<th>REQUIRED MODULES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Writer</td>
</tr>
</tbody>
</table>
General Ledger | Inventory
---|---
Accounts Payable | Human Resources
Employee Expense Reimbursement | Payroll
Accounts Receivable & Invoicing | Applicant Tracking
Cash Receipts | Benefits
Treasury & Cash Management | Time & Attendance
Budget | Workers’ Compensation & Risk Management
Fixed Assets | Position Control
Project & Grant Accounting | Portals (including Employee Self-Service, Vendor Self-Service, and Manager Self-Service)

**REQUIRED SERVICES**

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>Training Services, including development of training materials</td>
</tr>
<tr>
<td>Implementation Services</td>
<td>Testing Services</td>
</tr>
<tr>
<td>Software Installation and Configuration</td>
<td>Change Management</td>
</tr>
<tr>
<td>Hardware Installation and Configuration</td>
<td>Knowledge Transfer to Staff</td>
</tr>
<tr>
<td>Data Conversion</td>
<td>System Documentation Development</td>
</tr>
<tr>
<td>Reports &amp; Forms Development</td>
<td>On-going Support and Maintenance Services</td>
</tr>
<tr>
<td>Integration/Interface Development</td>
<td>On-Going Hosting Services</td>
</tr>
<tr>
<td>Software Modifications, if any</td>
<td></td>
</tr>
</tbody>
</table>

The Key Volumes document contains information regarding key data volumes. The goals of this system are to:

- Reduce or eliminate manual and paper-based processes
- Streamline business processes through workflow, automation, and self-service
- Increase data quality, integrity and reliability
- Support full integration between all system modules
- Enable strategic decision-making and planning
• Provide robust reporting and document management capabilities to all end users

2.3 MINIMUM REQUIREMENTS

The proposed system must meet the following minimum requirements. If your system does not comply, please do not submit a proposal:

Installed Base. The proposed system must have an installed base in K-12 school districts in Texas.

Current Version. The proposed solution must currently be operational at other clients. Do not respond based on a future release. By implication, you must be able to demo a live (albeit anonymous) database.

Web-based. The system must be accessible via a variety of web browsers. There is a preference for the system to be developed using web technologies.

Integration. The proposed solution must integrate seamlessly. The proposed solution must also have the ability to integrate with ancillary systems.

Report Writer. The system must have a flexible, intuitive report writer tool, accessible to end users, which can access data from all modules, as well as external data, and has the ability to select, filter, sort, correlate, and summarize.

2.4 IMPLEMENTATION SCHEDULE

Richardson Independent School District intends to implement a Finance/HR/Payroll system(s) with a go-live date as stated in Section 1.3. The vendor should completely explain within the body of the proposal how the vendor intends to address this schedule, as well as any recommendations as to phasing or sequencing of the implementation.

2.5 PRICING MODEL

Vendors are to provide pricing for both a SaaS model and an on-premise model for Richardson Independent School District.

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

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

The licensing can be either subscription-based or perpetual (the district owns the license) in this model. Please clearly identify your licensing model in your proposal.

2. Premise Based: The system is installed and hosted at Richardson Independent School District. The successful vendor is responsible for the installation and configuration of all software and utilities necessary for a fully operational system and shall provide the hardware cost/implementation services as
well. Additionally, the vendor shall specify the hardware specifications necessary for the system, should the District procure it from a separate source. The successful vendor will be responsible for all installation, training and conversion services for the District. The District may procure the hardware and operating system separate from this RFCSP, however vendor will still be responsible for installation and configuration of the hardware. For the premise-based model, the District will be responsible for the ongoing support of the hardware but will be reliant on the vendor for regular software updates and releases.

Both models assume that the successful vendor shall be responsible for the full installation/conversion/training services.

Please note the following when preparing your proposal:

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

In presenting software license fees, the vendor should:

- Explain all factors that could affect licensing fees;
- Make clear what type of license is offered for each price (named user, concurrent user, installed copies, processor-based, etc.);
- Indicate which product versions, operating platform(s), and machine classes are included for each price;
- Make clear the extent of any implementation services that are included in the license fees (installation, configuration, training, etc.).
- Identify whether the licensing is perpetual or subscription based.

### 2.6 PROJECT MANAGEMENT

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

- Work Breakdown Structure including tasks, responsibilities, interdependencies and milestones. It is expected that this tool will be used to manage activities during all phases of the implementation.
- Issues Log to track the status and resolution of all issues during the implementation.
- Regular (weekly or bi-weekly) status meetings and reports to advise project leadership at Richardson Independent School District on the status of the implementation including:
2.7 IMPLEMENTATION PLAN

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

a) General implementation approach
b) Project management approach
c) Change management
d) Data conversion plan (see below for additional details)
e) Report & forms development (see below for additional details)
f) Integrations and interfaces
g) Training (see below for additional details)
h) Testing (see below for additional details)
i) System documentation (see below for additional details)
j) Knowledge transfer including any tools, templates, and/or training materials that the vendor will provide to Richardson Independent School District
k) Ongoing support & maintenance

The vendor should not be constrained to only include the above items in the vendor’s Proposal if the vendor feels that they add value to the overall implementation. Richardson Independent School District requests that the vendor provide their work plan in a Gantt chart format as part of the Proposal. Additionally, the successful vendor must provide and maintain a detailed Gantt chart, showing tasks, dates, responsibilities, interdependencies, milestones and critical path items throughout the implementation.

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

2.8 SOFTWARE INSTALLATION & CONFIGURATION

The vendor is expected to specify, furnish, deliver, install and support all system software for the hosted solution. The vendor is expected to meet with Richardson Independent School District to review and discuss software configuration prior to implementation. The outcome of these meetings will determine how the software shall be configured to best meet the needs of Richardson Independent School District.

Please see detailed questions in Appendix A.

2.9 DATA CONVERSION PLAN

As part of this implementation, vendors are required to provide data conversion of the files indicated in Appendix A. Vendor is required to perform data verification to confirm that all data was transferred successfully, and will be required to obtain Richardson Independent School District signoff to
confirm as well.

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

Vendors should provide pricing for converting current/active data only (and in some cases prior year data) as the base bid (see Conversion Data tab in Appendix A for full base bid conversion requirements). Vendors should also provide optional pricing for an additional two years’ worth of historical data for all modules.

Please see detailed questions in Appendix A.

### 2.10 REPORT DEVELOPMENT

It is expected that the system will provide the ability for end-user querying and reporting to be performed without impacting the performance of the transactional system. It is also expected that the system will provide the ability to upload and download information ensuring integrity of uploaded information.

The vendor is expected to provide assistance to Richardson Independent School District staff in the development of needed reports, via technical training on the tools used for report development, database schema and architecture, etc.

Please see detailed questions in Appendix A.

### 2.11 INTEGRATIONS AND INTERFACES

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

### 2.12 TRAINING

Richardson Independent School District has an expectation that:

A. All power user and technical training will be performed on-site through implementation and be performed by the vendor.

B. End user implementation training will be via vendor-provided training for power users and can be a train-the-trainer approach for extended areas with significant users including joint participation by the relevant Richardson Independent School District process owner and Richardson Independent School District IT Services staff person supporting the process area.

C. The vendor will include training for Richardson Independent School District staff on the technologies required to support the new system.

D. The awarded vendor will be responsible for providing training materials (in electronic format) for the initial vendor-delivered training as well as for use by Richardson Independent School District
for subsequent training.

Any training that cannot be easily accommodated or is not practical to be performed on-site should be specifically identified. Alternatively, Richardson Independent School District is open to conducting remote training via the Internet but wishes to understand the pros and cons of such an approach.

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

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

Please see detailed questions in Appendix A.

2.13 TESTING

The vendor should describe their recommended approach to the following types of testing that are anticipated to be performed during the implementation effort and the type of assistance they anticipate providing to Richardson Independent School District related to testing:

A. System testing
B. Integration testing
C. Stress / performance testing
D. User acceptance testing

2.14 SYSTEM DOCUMENTATION

The vendor is expected to provide user manuals and on-line help for use by Richardson Independent School District as part of the initial training and on-going operational support. Additionally, the vendor is expected to provide technical documentation. Describe what types of documentation you anticipate developing during the course of the project. Vendors must also provide access to existing documentation for review by the Selection Committee.

2.15 KNOWLEDGE TRANSFER

The vendor should describe their process for ensuring that knowledge transfer occurs back to Richardson Independent School District staff (both technical staff and end users) such that staff is capable of providing level 1 end user support in the most efficient manner.

2.16 STAFFING PLAN
The vendor must detail the type and amount of implementation support to be provided (e.g., number of personnel, level of personnel, time commitment, etc.). Include resumes for all personnel that will be assigned to the project to include the following information:

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

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

A. Identify the degree to which vendor staff will be onsite versus off-site during the project
B. Demonstrate your ability to provide continuity of skilled consultant resources throughout the duration of the project
C. Describe the degree in which activities will be performed during normal business hours versus off-hours

Likewise, Richardson Independent School District requests that the vendor provide an overall staffing plan for the project including identification of the District resources during the course of the implementation in terms of hours or full-time equivalents (FTEs), both for Richardson Independent School District IT Services department staff as well as those within the various Richardson Independent School District process owning and process-using departments.

2.17 ON-GOING SUPPORT AND MAINTENANCE

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

Likewise, Richardson Independent School District requests that the vendor provide information respect to expectations on the District staff involvement to provide on-going support of the application.

2.18 BEST PRACTICE PROCESS WORKFLOWS

Appendix C contains best practice business process workflows that have been developed by the District. These workflows are also intended to be used as the basis for configuration of the new solution to be implemented in this project. Vendors are required to review these process flows and indicate in Appendix A any exceptions to the process flows. If no exceptions are noted, the District will expect that the proposed solution will support these workflows.

2.19 HOSTING REQUIREMENTS

The District does not intend to enter into a separate Agreement for hosting services. If a third party is to provide the hosting services (hereinafter referred to as “Hosting Provider”), the successful Vendor must subcontract the Hosting Provider. Proposals for SaaS model solutions must meet the following requirements:
A. The system must be available 24 x 7 x 365 with a minimum of 99.95% uptime, measured on a monthly basis (excluding maintenance windows).

B. Maintenance windows must be scheduled outside of normal business hours, and agreed upon with RISD staff. Windows should be pre-defined and communicated to RISD staff. Any non-standard window must be communicated to RISD staff at least two weeks in advance, with the exception of emergencies. In an emergency, Hosting Provider and/or Vendor staff are to work with RISD IT staff to determine appropriate time and communication to staff.

C. All data must reside in the United States at all times.

D. All system data and files should be regularly backed up to a secondary data center/disaster recovery site outside of the main data center’s same weather pattern and power grid.

E. Hosting Providers / Vendors should have a documented Security Incident Response Plan (SIRP) that addresses the vendor’s plan for preventing, detecting, and responding to security breaches or cyberattacks in which the ISD’s data or operations may be compromised.

F. Hosting Providers / Vendors must have a documented Disaster Recovery Plan (DRP) that addresses recovery and maintenance of system data and operations in response to hazard or emergency scenarios. This plan should be tested regularly to ensure that it is both tangible and actionable.

G. Hosting Providers / Vendors should have a documented Business Continuity Plan (BCP) that addresses localized or system outages that create an impact to one or more business functions. The BCP should account for the rapid restoration of services and redundancies in technology or process.

H. Hosting Providers / Vendors must be compliant with SSAE18 SOC2 and must provide a copy of their most recent audit report prior to contract award.

I. Hosting Providers / Vendors must support and be compliant with all relevant regulations and requirements including, but not limited to: PCI-DSS, FERPA, HIPAA/HITECH and GDPR.

Provide a description of the proposed hosting services with your proposal. Vendors must respond to questions in Appendix A with regards to new releases, OS patching and data locations. Please provide a copy of your service level agreement that guarantees 99.95% uptime.

2.20 RIGHT TO INSPECT

In the case of a SaaS solution, Richardson Independent School District reserves the right to inspect and investigate thoroughly the data center facilities, equipment, business reputation, and other qualifications of the Vendor and any proposed Subcontractors and to reject any proposal irrespective of price if it shall be determined that the Vendor is deficient in any of the essentials necessary to assure acceptable standards of performance. Richardson Independent School District reserves the right to continue this inspection procedure throughout the life of the contract that may arise from this RFCSP.

2.21 SYSTEM PERFORMANCE

System response time must not impede the ability for staff to perform their required job functions using the system. The system must be available 24 x 7 x 365 with a minimum of 99.95% uptime. Describe system performance of the proposed solution including reference to the following performance areas:
A. Guarantees on system performance
B. Studies/benchmarks on system failure frequency, duration and impact and root-cause analysis
C. Problem avoidance techniques
D. Evidence of system scalability to meet future needs as noted in key volumes section

Additionally, minimum hardware, software, storage, memory, operating system and other requirements for desktops and laptops to access the application must be provided such that RISD can determine the extent to which existing computers must be upgraded or replaced.

### 2.22 OTHER COSTS

If any costs are associated with your proposed services that have not been identified in prior sections, they must be detailed here. Any such charges will be clearly identified and all non-recurring and monthly costs provided. These other costs if any must be shown using the form [Appendix A](#).
APPLICATION SOFTWARE REQUIREMENTS
3 APPLICATION SOFTWARE REQUIREMENTS

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

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

Y Functionality is provided out of the box through the completion of a task associated with a routine configurable area that includes, but is not limited to, user-defined fields, delivered or configurable workflows, alerts or notifications, standard import/export, table driven setups and standard reports with no changes. These configuration areas will not be affected by a future upgrade. The proposed services include implementation and training on this functionality, unless specifically excluded in the Statement of Work, as part of the deployment of the solution.

R Functionality is provided through reports generated using proposed Reporting Tools.

T Functionality is provided by proposed third party functionality that has a standard integration/interface with the primary vendor solution (i.e., third party is defined as a separate software vendor from the primary software vendor). This third party software must be included in your costs in order to be identified as a “T” in your response.

M Functionality is provided through customization to the application, including creation of a new workflow or development of a custom interface, which may have an impact on future upgradability. Costs for modifications must be included. If not, vendor should mark these items as an “N” and note in comments that it could be achieved at a cost that is yet to be determined.

F Functionality is provided through a future release that is to be available within 1 year of the proposal response.

N Functionality is not provided.

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

Provided Separately:

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

Appendix B – Software Specifications

Appendix C – Best Practice Workflows