

## SANTA CLARA COUNTY OFFICE OF EDUCATION

ADDENDUM #1

## RFI#01-22-23 SCCOE ERP

This Addendum forms a part of the RFI Documents for above project and modifies the original project specifications as noted below. Please acknowledge receipt of this Addendum#1 in your RFI response.

**ADDENDUM NO. 01****Dated: 02/22/2023****Key Updates:**

**The RFI Due Date is extended from March 30, 2023, to April 14, 2023.**

**Q&A:**

(1) *In Section 2.2 – Purpose*, the RFI states, “Santa Clara County Office of Education’s purpose in issuing this RFI is to obtain information to assist SCCOE leadership in understanding current options and approaches to meeting enterprise software needs to operate efficiently and effectively.” Will SCCOE consider stand-alone services as an alternative approach to a single solution delivering all services in scope?

**Answer: All options will be considered, however, SCCOE is seeking to find a solution for fully integrated ERP core modules.**

(2) Will individual service modules, such as human resources, time entry, applicant tracking, or benefits, be considered as options? Or, is SCCOE only interested in “a comprehensive, fully integrated, public-sector ERP and supporting services,” as stated in *Section 2 – Project Introduction*?

**Answer: SCCOE is interested in “a comprehensive, fully integrated, public-sector ERP and supporting services”. If a vendor can demonstrate integration with stand-alone modules for those core ERP areas, the SCCOE welcomes vendor responses.**

(3) *In Section 4.1 – Software Functional Scope*, the RFI states, “Santa Clara County Office of Education seeks information about resources available in the market to meet the system and software needs described, options for the underlying technical infrastructure supporting those systems, and best practices in implementation and integration.” Will SCCOE consider stand-alone services as a proposed best practice toward integration as an alternative to a single solution delivering all services in scope?

**Answer: SCCOE is open to evaluating all options, providing any stand-alone services can be fully integrated with all required core ERP modules.**

(4) *In Section 4.1 – Software Functional Scope*, the RFI states, “For those elements of functional scope that are not supported by the Respondent’s software, respondents are encouraged to provide information about or alternative approaches to meet the functional scope.” Will SCCOE consider stand-alone services as an alternative approach to meet functional scope as part of an integrated system structure?

**Answer:** SCCOE is open to evaluating all options, providing any stand-alone services can be fully integrated with all required core ERP modules.

(5) *In Section 4.2 – Technical Delivery Scope*, the RFI states, “Through this RFI, Respondents are encouraged to communicate the advantages of the various deployment options that may be available for the ERP software solution and the planned future direction of products to support or transition to alternative deployment models in the future.” Will SCCOE consider stand-alone services as an alternative deployment model? Or, is SCCOE only interested in “a comprehensive, fully integrated, public-sector ERP and supporting services,” as stated in *Section 2 – Project Introduction*?

**Answer:** SCCOE is open to evaluating all options, providing any stand-alone services can be fully integrated with all required core ERP modules.

(6) There are many types of user licenses. Can you please help us understand what type of user licenses and how many seats you may need?

**Answer:** SCCOE and the districts would require many types of user license (admin, superuser, user etc). Upon documenting detailed requirements from each business unit, the exact number and allocation of the licenses to SCCOE roles will not be available. SCCOE and the districts have more than 420 users.

(7) I understand you require a demo sent over that focuses on the core requirements. Given you have detailed 366 items on the requirements page and outlined some key requirements, can you please give us direction on what to focus on for the demo?

**Answer:** SCCOE would like to better understand how your system handles core ERP processes within the following modules of HR, Finance, Budget and Procurement

(8) In order to protect our intellectual property and privacy, we are not comfortable sending our demo recording via mail. We respectfully request that we offer you an online demo that can be recorded.

**Answer:** We can setup SFTP folder to securely obtain the demos as some companies may have concerns with sending product info via mail.

(9) Are Student Activity Accounting Module, Local School Accounting, Food Service Accounting, Project/Grant Accounting, Bid Management must have features of the core RFP? We do not offer these modules. Will you consider purchasing through a separate third party?

**Answer:** All those are considered core modules for SCCOE’s evaluation. Ideally, SCCOE would like a vendor to include a single unified solution either through an integration using another non-native application or via the core vendor application.

(10) Will you consider vendors with no prior experience in California with K-12 education?

Answer: Yes SCCOE will consider vendors with no prior experience in California with K-12 education. It is SCCOE's preference to have a vendor with experience in implementing an ERP software solution for a public school system in the State of California.

(11) We'd like to request a submission extension of 2-4 weeks.

Answer: We are extending the submission due date by 2 weeks. The new date is April 14, 2023.

(12) Confirming that SCCOE provides support for 47 districts spanning Santa Clara and San Benito Counties?

Answer: See RFI SCCOE Background section 2.1

(13) Confirming the student population spanning both counties is approximately 214,000?

Answer: See RFI SCCOE Background section 2.1

(14) Are all ERP operations currently managed in two distinct ERP systems, one for Santa Clara County and one for San Benito County?

Answer: See RFI SCCOE Background section 2.1

(15) Do you expect the future state architecture to deliver all processes in one ERP system supporting both counties and spanning 47 districts?

Answer: This is yet to be determined. Further analysis will determine SCCOE preference.

(16) Will the ERP system support both K12 and Community College systems in Santa Clara and San Benito Counties? If yes, all services for all users?

Answer: The ERP System will not be supporting Community College systems.

(17) What is the employee population spanning all districts in scope that would be supported in the ERP system?

Answer: Yes, the employee population spanning all districts are in scope and would be supported by the ERP system

(18) Are there blackout periods throughout the year where system cutover or go live dates should be avoided?

Answer: Yet to be determined

(19) Are there parallel initiatives, inflight projects ongoing / planned ahead, which need to be considered for this transformation as potentially dependent in the portfolio of projects?

Answer: Yet to be determined

(20) Are there applications or hardware technologies that aren't currently supported under maintenance agreements, are nearing end of life or have expiring contract deadlines that should be considered for deployment sequencing scenarios?

Answer: Yet to be determined

(21) Are there desired preferences of capabilities or process areas that should go-live first? If so, please share those preferences and reasons for each.

Answer: Prioritization of an expansive list will be determined during detailed business and technical analysis following RFI phase.

(22) What primary factors are affecting the districts and creating the need to seek a new technology platform as outlined in the SCCOE RFI?

Answer: See SCCOE RFI Section 2 Project Introduction

(23) Does SCCOE have a desired target date for all districts to be live on the new technology platform?

Answer: Yet to be determined

(24) Will this modernization plan being considered be elective or mandatory for each district to accept?

Answer: Yet to be determined

(25) In developing the requirements for this RFI, has the SCCOE undergone any process reviews or future state planning for this transformation?

Answer: Not yet. The next phase of this effort will include process reviews, detailed requirements, and future state planning.

(26) For Organizational Change Management requirement, does SCCOE have a change management team that will collaborate with your awarded partner, or is Change Management to be fully the responsibility of the partner?

Answer: A change management team will be led by the awarded vendor with support from the SCCOE ERP team

(27) Does SCCOE have the staff with both availability of time and skills to support the ERP system implementation?

Answer: Resource capabilities and availability for an ERP implementation has yet to be determined. SCCOE has the technical and SME resources to support an ERP implementation, however, a comprehensive analysis of internal capabilities has not been documented at the time of this response.

(28) Is there an architectural diagram comprising the current technology landscape that can be shared?

Answer: Not at this time. If SCCOE decides to move forward with an RFP, this level of documentation will be available.

(29) Do you intend to migrate historical data to the new technology platform? If yes, how many years of data will need to be migrated?

Answer: This is yet to be determined, however, SCCOE will follow state and federal requirements for access to a historical data

(30) Identify the level of data consistency in the current ERP system. How is your data quality, are there areas where you believe data cleanup is needed?

Answer: Detailed analysis will determine specific data quality issues. We anticipate a level of data clean up as part of an ERP transformational project.

(31) You mention importing data from your SIS, do you also require an interface to DataQuest for State reporting?

Answer: SCCOE would like to see vendors provide options on interfaces

(32) Are there processes that are unique from one district to the other that should be considered in a phased-deployment strategy? Or will the SCCOE deploy a standard blueprint solution for all districts to leverage?

Answer: Yet to be determined

(33) What is your current report count across HR, Payroll, Finance, Supply Chain and Budget?

Answer: We would like to explore the reports in the new ERP system during the RFP phase.

(34) What is your current interface count across HR, Payroll, Finance, Supply Chain and Budget?

Answer: We would like to explore the interface/API in the new ERP system during the RFP phase.

(35) Do you maintain chart of accounts (COA) hierarchy in GL? Do you envision multiple COA hierarchies in the new system?

Answer: We have different COA hierarchies today. We envision multiple COA hierarchies in the new system as well.

(36) How many different ledgers are in your current ERP?

Answer: We have 47 ledgers in our current ERP system.

(37) What is your current integration platform?

Answer: We would like to explore the integration platform in the new ERP system during the RFP phase.

(38) Will data warehousing be considered as part of the ERP system implementation?

Answer: Yet to be determined

(39) Identify the top ten extensions or customizations that are critical to your operations in the current ERP (excluding reports and integration)?

Answer: SCCOE has yet to prioritize requirements, thus, cannot provide this list at this time

(40) Describe your current payroll processing cycle. How many payrolls are run (centralized or decentralized)? Please provide as much detail as possible

Answer: This level of detail will be provided in RFP.

(41) Will you be paying any non-employees? (i.e., Contingent Workers/Independent Contractors, Pensioners, Recruiters, Surviving Spouse) / If yes, please specify types.

Answers: We need to have the capability to pay non-employees.

(42) Will absence management and employee benefits plans be maintained in the human resources portion of the new ERP system?

Answer: The expectation for the new system is to have the ability to perform these functions or easily integrate with industry standards applications.

(43) How are payroll fulfillment processes currently managed today - direct deposit, check printing, paycards, tax filing services, W4 submissions, W2 creation? Does the organization work with a payroll service bureau or managed internally?

Answer: All those processes are used today. SCCOE manages those functions internally.

(44) Please describe your current time entry process. What method of time collection is most used? What is the desired method of time collection in the new technology platform?

Answer: SCCOE is seeking to have use industry best practices for the future application

(45) What is the most common feedback received from employees regarding human resources, self-service, or talent management related capabilities?

Answer: Yet to be determined. Further analysis including survey feedback is the proposed next steps.

(46) How do current technologies support each districts talent attraction, development, and employee engagement activities?

Answer: Limited interaction and support mechanism in current environment

(47) Are there instances where current technologies have inhibited staff's ability to attract, acquire or retain skilled talent for each district? If so, please highlight functional areas that are affected most.

Answer: Yes, limited functionality in the current environment impacts those areas. Further analysis will determine which areas are affected the most.

(48) Does SCCOE desire a new technology platform and overall experience that is mobile optimized? In which functional areas as described in the RFI will this be most important to the districts?

Answer: Yet to be determined, however, the expectation is to have a scalable application which supports mobile, AI, ML and IoT capabilities.

(49) Are there any restrictions to utilizing nearshore or offshore resources for the implementation project?

Answer: If SCCOE moves forward with an RFP, offshore requirements and restrictions will be provided. Adhering to state and federal requirements including PII, PHI, HIPAA, FISMA and NIST framework

(50) Will it be necessary for consultants to be on-site during the deployment of the project?

Answer: The work environment is yet to be determined. It may consist of remote with occasional travel for critical phases or a hybrid model with most of the work performed remotely.

(51) Following this RFI phase, please describe the next activities that SCCOE will undergo regarding this technology modernization plan? Has budget been secured to support this plan?

Answer: The objective of the RFI is to gather current ERP capabilities from various vendors to share with the business and technology community at SCCOE. No current budget has been confirmed for procuring any future state ERP environment. Further analysis will determine next steps.

(52) Is there any chargeback, or billing considerations that respondents should take into consideration as it relates to SCCOE's support of 47 districts across 2 counties?

Answer: Yet to be determined

(53) What follow up activities will require support from respondents of this RFI?

Answer: Once a decision is confirmed to move forward with the development of the RFP, a communication will be provided to respondents of this RFI.