

ADDENDUM 03

MAY 1, 2026

RFP 02_25_26 ENTERPRISE RESOURCE PLANNING (RFP) SOFTWARE

FOR

THE SANTA CLARA COUNTY OFFICE OF EDUCATION

This Addendum is hereby made into part of the bid documents for the above-referenced project and serves to modify the original project specifications as outlined below. Please acknowledge receipt of this Addendum in your proposal. Failure to do so may result in disqualification of your response.

Questions	Answers
Can SCCOE provide district-by-district volumes for payroll (employees, substitutes, pay cycles), benefits participants, annual W-2/1099, requisitions, purchase orders, invoices processed, etc. ?	SCCOE cannot provide this level of district-by-district volume detail at this time, as the data is subject to change on an annual basis.
Can you please clarify or provide additional context around this requirement: AR 8- Ability to do online payments on different marketplaces.	This requirement refers to the system’s capability to support online payments made directly to external vendor marketplaces (e.g., Amazon, Best Buy, and similar platforms). It typically involves enabling users to complete purchases within those marketplaces while ensuring the transactions are properly authorized, recorded, and integrated into the organization’s financial and procurement processes.
Can you please lay out the timeline for budget cycle for the districts and does that match the budget cycle for SCCOE	The budgeting timeline for the districts aligns with SCCOE’s fiscal structure and is generally consistent across all entities. The budget development cycle typically runs from February through June each year. This timeframe supports planning, reviewing, and approval activities leading up to the start of the new fiscal year.

	SCCOE and all districts operate on the same fiscal year, which runs from July through June. As a result, all districts are required to complete and finalize their budgets by the end of June to ensure readiness for the new fiscal year beginning July 1.
For AB 1200 oversight, which workflows must include county approvals or county review/suspension rights, and are these consistent across all districts	We cannot provide these workflows at this time. These will be discussed in detail during the implementation phase, including which processes require county approval, review, or suspension rights under AB 1200, and whether those workflows are consistent across all districts.
How do the projects (capital and grant) get managed today?	We cannot provide this breakdown at this time, as each entity is set up and managed independently.
How many banks and how many bank accounts need to be integrated into the new ERP system?	The number of banks and bank accounts to be set up and integrated into the new ERP system is expected to be less than 10 at this time.
How many different budgeting cost allocations are performed? What are the categories?	We cannot provide this breakdown at this time, as the number and categories of budgeting cost allocations vary from year to year.
How many financial/operating reports do you require to facilitate your budgeting and forecasting process?	The number and type of financial and operating reports required will depend on the capabilities of the new ERP system and the reports it provides to support budgeting and forecasting processes.
How many labor bargaining units are in scope?	The number of labor bargaining units in scope will depend on the specific labor bargaining agreements in place at each district and the COE.
How many users participate in the budgeting process?	We cannot provide this breakdown at this time, as each entity is set up and operates independently.
Is the budget process a centralized or decentralized process. Will the schools and districts adhere to the same budgeting processes?	The budgeting process is decentralized across the schools and districts; however, all entities adhere to the same overall budgeting policies, guidelines, and standardized processes established for consistency.
Is the Payables processing (invoicing and Payments) centralized across all School Districts?	Yes, the payable function is currently centralized at the COE for all districts.
Is there an anticipated budget range or funding authorization level established for this ERP software and implementation initiative? Can this be shared?	We are not able to provide this information.

<p>Is your forecasting process different from your budgeting process? If so, how does it differ?</p>	<p>We are not able to provide this information.</p>
<p>Please describe how HCM and Payroll processes are currently handled at the LEA (District) and SCCOE organizational levels, and expectations for how these processes will be completed in the new system.</p>	<p>HCM is currently decentralized, and each district may be using a different HCM solution. However, payroll is entered at the district level and then processed at the COE level.</p> <p>For the new system, the expectation is that HCM and payroll processes will continue to support this distributed input model at the district level, while maintaining centralized processing and oversight at the COE level, ensuring consistency, control, and standardization across all entities.</p>
<p>There are multiple requirements which state that the data has to be available at a County and a district level. Does the data availability for the two counties have to be segregated such that one county cannot see the transactions of the others or is the expectation that the transactions for both counties should be viewable and/or modifiable by a common group across the following transaction types:</p> <ul style="list-style-type: none"> a) Requestions, b) Purchase Orders, c) Procurement Contracts, d) AP Invoices, e) GL Journals f) Fixed Assets 	<p>The data for the two counties and districts must be segregated, meaning each entity should only have visibility into its own transactions. One county should not be able to view or access the transactions of the other. Each organization’s data should remain isolated, with access restricted based on appropriate roles and permissions.</p>
<p>What are the processes that are followed for grants management and does that include reporting from each district?</p>	<p>We cannot provide detailed processes at this time, as these may vary by entity. However, we would like to understand and evaluate the processes and capabilities that ERP vendors can offer for grants management, including how district-level reporting is supported within their solutions.</p>
<p>What departments such as Facilities, Fleet, etc. need to be included in Work Order implementation?</p>	<p>We cannot provide this information.</p>
<p>What is the capital budget process and how are the projects approved?</p>	<p>We cannot provide the detailed capital budget processes at this time, as they may vary by entity and are subject to change. However, we would like to evaluate how ERP vendors support capital budgeting workflows, including project approval processes, and the level of configurability offered to align with district and COE requirements.</p>

What is the user count for work order maintenance such as field staff, warehouse staff, managers etc.?	We cannot provide this breakdown at this time, as the user counts for work order maintenance vary across entities and may change over time.
What payroll cycles are currently supported (e.g., bi-weekly, monthly), and how many payroll runs occur per cycle?	The payroll cycle is currently run monthly, with payroll processed once per cycle.
Which processes are centralized at the district level and at the Office of Education level.	Payroll and AP Checks are processed at the COE level
Will the processing for procurement, invoicing and payments be separate for the School Districts of San Benito and Santa Clara Counties Offices?	Yes, the processing for procurement, invoicing, and payments will be handled separately, as the School Districts of San Benito and Santa Clara County Offices are independent entities.
For Payroll Processing does SCCOE and SBCOE process their own LEAs, or are they processed together as a single payroll process across both Counties?	Payroll are processed by each County of Education Office separately.
For Vendor Warrants processing does SCCOE and SBCOE process their own LEAs, or are they processed together as a single vendor warrant process across both Counties.	Vendor Warrants are processed by each County of Education Office separately.
For Budgeting, will each LEA generate its own Budget book, or is this a function of the COE?	Each LEA generates its own Budget Book
Regarding Requirements COEFN54.00 and COEPY215.00, can you provide more information regarding the County Treasurer's role in the bank reconciliation process? We are trying to determine how the bank reconciliation process will work between COE, the County Treasurer, and the Banks themselves.	We are not able to provide this breakdown at this time
Would SCCOE consider a two (2) week extension to the proposal submission deadline?	The deadline for proposed submittals has been extended from May 8 to May 15, 2026
To ensure we are able to develop a comprehensive proposal accounting for the many complex COE and LEA requirements, we request an additional two-week extension of the proposal deadline to May 22, 2026.	The deadline for proposed submittals has been extended from May 8 to May 15, 2026
Can SCCOE provide an overview of current benefits carriers, enrollment volumes, and retiree populations?	We cannot provide this breakdown at this time, as the information is dynamic and changes annually.
For Talent Acquisition (Recruiting), are there any security requirements that restrict an authorized district user (Recruiter or Recruiting Admin) from seeing another district's candidate data?	Each District is set up an stand-alone and does not share candidate data on Talent Acquisition.
How complex are workforce scheduling rules across LEAs (e.g., shift differentials, rotations, premiums, shift bidding, scheduling based on credentials/certifications, etc.)?	We cannot provide this breakdown as each entity is setup independently

<p>Please confirm whether SCCOE expects the proposed solution to natively generate COBRA notices, manage elections, bill participants, track payments, and administer cancellations for non-payment, or whether integration with an external benefits administration platform would be acceptable.</p>	<p>We do not have a preference in this matter but expect the ERP vendor/SI to propose a solution in the proposal.</p>
<p>For Retirement (PERS, STRS, and ARS) does SCCOE and SBCOE process their own LEAs separately, or are they process together across both Counties?</p>	<p>Retirement (PERS, STRS, and ARS) are processed by each County of Education Office separately.</p>
<p>For Benefits (non-retirement), does each LEA offer and manage its own benefit plans and rates, or is this a function of the COE?</p>	<p>Each LEA offers and manages its own benefit plans and rates.</p>
<p>SCCOE mentions an optional item of interest is a time accounting and reporting solution. In order to be able to understand the scope needed, we have several questions regarding this topic.</p> <ol style="list-style-type: none"> 1. Describe how COE employees currently turn in hours/time for payroll. How many submit time? 2. Describe how district employees currently turn in hours/time for payroll. How many submit time? 3. Does anyone within the COEs/Districts use physical time clocks and if so, what kind and how many? 4. Please give the total number of employees within both COEs and all districts that would need to track time. <p>Salary Exempt Salaried Non Exempt (Hourly paid annually) Hourly Part Time Substitutes</p>	<p>The main scope of this ERP RFP is Finance and HR Applications.</p>
<p>Is there a desire to consolidate or standardize timekeeping and substitute management processes across all district locations into a unified solution within the ERP, specifically to help with troubleshooting and reduction in integrations?</p>	<p>Each District is set up as independent, and there is no desire to consolidate or standardize timekeeping and substitute management processes across all district locations into a unified solution within the ERP</p>
<p>Does SCCOE or any of the districts or LEA's have any specific needs surrounding time collection via physical time clocks? If yes, can you please provide more background information.</p>	<p>Each District is set up as independent, and there is no need surrounding time collection via physical time clocks</p>
<p>Are any of the SCCOE districts or LEA's currently partnering with a timekeeping provider? If yes, can you please provide the organizations that they are partnering with to ensure integrations are possible.</p>	<p>Each District is set up as independent.</p>
<p>Are any of the SCCOE districts or LEA's currently partnering with a substitute management provider? If yes,</p>	<p>Each District is set up as independent.</p>

can you please provide the organizations that they are partnering with to ensure integrations are possible.	
Can the COE please confirm that this is the complete list of all collective bargaining agreements? (Appendix G – COE Payroll Requirements, General Requirements) https://www.sccoe.org/depts/hr/lists/contracts%20and%20agreements/allitems.aspx	The collective bargaining agreements (Districts and COEs) can be revised, created and updated at any time. They will be provided at the time of implementation.
Can the COE clarify that the collective bargaining agreements apply to all districts? (Appendix G – COE Payroll Requirements, General Requirements)	Each collective bargaining agreement is unique to each District/COE. It does not apply across all districts.
Do all districts have the same benefits open enrollment period? Does Santa Clara and San Benito have the same benefits open enrollment period? (Appendix E – General Payroll and HR Requirements, BEN 33.00)	The Open Enrollment Period is unique to Santa Clara and Sn Benito.
Can SCCOE confirm whether the duplicate listing of Campbell Union High School District in Appendix A is a formatting duplication or whether multiple entities are intended (e.g., separate legal entities)?	Yes, it is a typo. There are two school districts in Campbell. These are Campbell Union School District and Campbell Union High School District.
Has SCCOE been in contact or had demonstrations or presentations with other software vendors or systems integration partners/vendors prior to the release of this RFP? Has SCCOE If so please list.	No. SCCOE has not participated in any demonstrations or presentations with other vendors or systems integration partners related to this ERP RFP prior to its release.
On page 21 of RFP 02_25_26 – Enterprise Resource Planning (ERP) Software, Appendix C–H is referenced for vendor responses. Could you please clarify whether vendors should submit responses to Appendices C–H as separate attachments in their native Excel format, or if these materials should be embedded within the main technical proposal?	Vendors should submit responses to Appendices C - H as separate attachments in their native Excel format. We will consolidate all vendor responses using this format.
On page 27 of RFP 02_25_26 – Enterprise Resource Planning (ERP) Software, the document references a “Non-Collusion Form (with Notary Form).” However, the provided Non-Collusion Form itself does not indicate that notarization is required. Can you please confirm whether the Non-Collusion Form must be notarized?	In accordance with California Public Contract Code requirements, the Non-Collusion Declaration must be executed under penalty of perjury. Notarization of the declaration is not required and will not be used as a basis for determining responsiveness or bid compliance.
Given our shared commitment to environmental sustainability, would you consider waiving the requirement for hard-copy RFP submissions and permitting an electronic-only response to reduce paper use and associated environmental impact?	No. Each vendor is required to submit one (1) original proposal in hard copy form (via mail or in person), and one (1) proposal in electronic format via email or thumb drive, no later than 3:00 PM on Friday, May 15, 2026.
In section 2.2 it mentions that vendors are required to submit a proposal in electronic format via email; however, it mentions that “...electronic copies of the proposal will not be accepted” on page 1. Can you	No. Each vendor is required to submit one (1) original proposal in hard copy form (via mail or in person), and one (1) proposal in electronic format via email or thumb drive,

confirm that vendors are required to provide electronic copies via email?	no later than 3:00 PM on Friday, May 15, 2026.
Please clarify the method of submission. Page 9 of the RFP in section 2.2 states “Each vendor is required to submit one (1) original proposal in hard copy form, and one (1) proposal in electronic format via email to the SCCOE contact as listed below. However, page 10 of the RFP in section 2.4 states “Proposals, one (1) hard copy original and one (1) digital copy of the complete vendor proposal in form of thumb drive/USB...”.	No. Each vendor is required to submit one (1) original proposal in hard copy form (via mail or in person), and one (1) proposal in electronic format via email or thumb drive, no later than 3:00 PM on Friday, May 15, 2026.
Would you consider an alternative cost workbook structure where all non-optional (core) modules are consolidated into a single sheet, and each optional module is presented on separate sheets? This approach would preserve transparency for decision-making on optional scope while avoiding arbitrary allocation of shared costs across required modules. (Appendix I – Cost Proposal)	You should submit the cost based on the format of the COST PROPOSAL (Appendix I). However, you may also provide a more detailed breakdown using an alternative cost workbook structure—where all non-optional (core) modules are consolidated into a single sheet, and each optional module is presented on separate sheets. Optional modules will not be considered in the scoring.
With reference to Section 4.2 – Evaluation Selection Process, Phase 2 outlines the cost components to be considered; however, can the COE clarify the methodology that will be used to evaluate costs over the ten (10) year period, including any assumptions, normalization approach, and weighting (if applicable)? (4.2 Evaluation Selection Process, pg28)	We will determine the cost of each proposal, based upon the following: <ul style="list-style-type: none"> a. Hardware Costs b. Software Costs c. Customization d. Installation services e. Integration, Implementation, Training, Conversion f. Software Licensing g. Maintenance and Support Costs
Are processes consistent and uniform across all of the school districts or is the intent to standardize all processes across the districts. If not, can you identify the specific processes that unique at district or school levels?	No, the processes are not consistent or uniform across all districts and COEs.
Are there any additional entities (charters, JPAs, foundations, adult ed programs) that will transact in the ERP but are not listed in Appendix A? How many Legal Entities/Legal Employers in total will use the system? How many FEIN's.	We are looking at 45 Legal Entities (COEs and Districts)
Are there any future processes that San Benito or Santa Clara expect to NOT be standardized in the future system?	It depends on the individual district or COE.
Can SCCOE provide a listing of all systems SCCOE would like integrated with the future ERP system? What substitute/absence management system, recruiting	SCCOE does not currently have a finalized or complete listing of all systems intended for integration with the future ERP system. The

platform, credential tracking and monitoring solution will SCCOE integrate with in the future ERP systems? What are all of the legacy systems today that are being replaced (example: Procurement, HR, ERP, Asset Management, physical time clocks, Laserfiche, etc.),	integration scope is assessed during implementation for districts and COEs.
Can you provide a list of systems that will be kept and must be integrated to the new system?	Not at this time. The determination of systems to be retained and integrated into the new ERP will be made based on the selected vendor and the final implementation design.
Does SCCOE have any project timelines guidance as to kick off, go-live dates, significant interruption periods during the project, phased or single go live dates, etc. Are there systems sunsetting that must be factored into project schedules?	This is a multi-year process, and SCCOE does not have a fixed timeline currently for kick-off, go-live, or system sunset dates. Key milestones such as implementation phases, potential interruptions, and whether the deployment will be phased or single go-live will be determined in collaboration with the selected vendor during project planning and design. At this stage, there are no finalized system sunset dates; these will be assessed and incorporated into the project schedule as part of the implementation roadmap.
For the business functions included within the scope of work, please provide information regarding the degree of current process centralization and decentralization. What processes or functions are centrally handled by the Local Education Agencies (LEAs) or Districts, and what processes are handled at the individual schools level.	The current operating model is generally centralized at the SCCOE and district level for core business functions included in the ERP scope, with varying configuration degrees at the individual school site level depending on the LEA.
How does SCCOE manage a help desk for these systems being replaced. Are they managed centrally or at the district level?	The help desk of the current ERP System is managed centrally.
Is San Benito County on the same ERP as Santa Clara County or on a different ERP?	San Benito County and Santa Clara County are on different ERP instances. However, both are using the same ERP platform (QSS), but each county operates its own separate instance of the system.
Please clarify whether SCCOE intends to lead the Change Management workstream. If SCCOE will be leading this workstream, would you like the implementor to provide guidance and advisory support for Change Management?	SCCOE anticipates that Change Management will be a joint effort. The majority of the work is expected to be led by the implementation team, with SCCOE providing coordination and stakeholder engagement support as needed.
Will San Benito adopt the same processes that SCCOE adopts in the systems?	Yes. San Benito will adopt the same processes that SCCOE adopts within the system.
Can you provide the list of districts within the county that will be using the ERP system, as well as which districts	Please refer to Appendix A, which lists all the districts.

will remain offline but be included in PERS and STRS reporting files?	
In Section 2.1, it is stated that the counties and LEAs serve approximately 33,770 employees. Can you share the corresponding Full-Time Equivalent (FTE) count?	SCCOE does not maintain a consolidated Full-Time Equivalent (FTE) count separate from employee headcount across all counties and LEAs currently. The most accurate FTE figures are maintained at the individual district and county office level. Therefore, to obtain precise and current FTE data, it is recommended to refer to each LEA or county's official website or published staffing reports.
We understand all districts will follow SACS chart of accounts structure and segment values. Do the LEAs have the ability to define any segment values such as projects?	Yes. LEAs follow the SACS chart of accounts structure and standard segment values. LEA has added manager code, site code, project, cost center, and sub-object code.
Regarding Requirement COEFN34.00, can you provide a list of Districts/Colleges/JPAs that have their own financials system? Secondly, while these entities have their own financial system can we assume that the COE will still process their payroll and retirement benefits?	The ERP of choice will define the file specifications and data exchange formats that districts will be required to adhere to.
Please confirm our understanding regarding Requirement COEPY32.00. Where employees, such as substitute teachers, work across districts they will receive multiple W-2s and the COE is responsible for processing W-2s for all employees across all districts.	Where employees, such as substitute teachers, work across districts, they will receive multiple W-2s, and the respective COE is responsible for processing W-2s for all employees across their districts.
Is the list of post payroll processing electronic files in Appendix G (requirements COEPY213.00 through COEPY233.00) the entire list of interfaces that are generated following payroll processing? Are there any other benefit vendor interfaces that must be generated?	The list of post-payroll processing electronic files in Appendix G (requirements COEPY213.00 through COEPY233.00) represents the primary required interfaces generated following payroll processing.
	In addition to those listed, there are also other benefit-related vendor interfaces that may need to be generated, including (but not limited to):
	Tax Shelter Annuity deductions and reporting files
	Child Support withholding and remittance files
	Elective Health Benefit interfaces, including Health Savings Accounts (HSA) and Flexible Spending Accounts (FSA)
	Final interface requirements will be confirmed during implementation based on selected vendor capabilities and district/COE-specific benefit arrangements.

Regarding Requirement AP108.00 and AP109.00, our assumption is that AP checks are processed by the COE. While these requirements are in Appendix D – General Finance Requirements, we want to confirm checks are processed and printed by COE and not the districts.	AP Checks are processed by the COE.
In the legacy ERP system today, is there a single vendor file shared across districts, or does each district have its own vendor file? Are districts allowed to add vendors or is that a function of COE? For conversion purposes, does SCCOE anticipate the significant cleanup of vendors will be needed.	Each district has its own Vendor file.
In the legacy ERP system today, is there a single customer file shared across districts, or does each district have its own customer file? Are districts allowed to add customers or is that a function of COE? For conversion purposes, does SCCOE anticipate the significant cleanup of customers will be needed.	Each district has its own Customer file.
Are purchasing workflows standardized across districts or do districts have the authority to implement their own workflow rules, including number of approvals, approval thresholds, etc.	Purchasing workflows are not standardized across districts.
Is the contract management process consistent across districts or do the districts have the authority to manage RFPs and Contracts themselves.	The ERP does not enforce or centrally govern contract management across all districts.
	Contract management processes are not fully consistent across districts; rather, districts generally have the authority to manage their own RFPs and contracts based on local policies, approval structures, and operational needs.
Do all districts utilize inventory or is that limited to the larger districts with many schools and locations? If it is limited, can you provide an estimate of the number of districts that will utilize inventory in the new ERP.	Inventory functionality is not widely used across all districts and is generally limited to the larger districts with multiple schools and distributed locations.
	At this time, it is estimated that approximately 10% of the districts will actively utilize inventory management functionality in the new ERP.
Do all districts utilize work orders or is that limited to the larger districts? If it is limited, can you provide an estimate of the number of districts that will utilize work orders in the new ERP.	Work order functionality is not currently utilized
Do any of the districts have asset maintenance or fleet management systems that we will need to integrate with?	No, there are no known district-wide asset maintenance or fleet management systems that will require integration with the new ERP.

<p>In section 1.2 the RFP mentions “Eliminate standalone business processing systems, independent tracking mechanisms and paper-intensive manual processes.” Can you give more details about the paper-intensive manual processes and independent tracking mechanism you are using?</p>	<p>The paper-intensive and manual processes primarily refer to spreadsheet-based information tracking</p>
<p>Do the 33 School Districts in Santa Clara County share one applicant tracking system or do you want each District to have their own applicant tracking system? Is SCCOE preferring 33 different applicant tracking solutions or one system for all?</p>	<p>Each district currently operates independently with respect to applicant tracking.</p>
<p>Is SCCOE looking for a Substitute Dispatch System as well?</p>	<p>A substitute dispatch system is not part of the current ERP scope; however, it is under consideration for future evaluation depending on the selected vendor’s capabilities and overall solution approach.</p>
<p>Are there additional collective bargaining agreements for San Benito? If so, can the COE please provide them?</p>	<p>The collective bargaining agreements (Districts and COEs) can be revised, created and updated at any time. They will be provided at the time of implementation.</p>
<p>Can the County Office of Education (COE) please clarify if there is an existing LMS/LXP to house the training (including training tracking)? (3.7.4 Training Plan, pg24)</p>	<p>The COE does not currently require the ERP to function as a Learning Management System (LMS) or Learning Experience Platform (LXP) to house or deliver training content.</p>
<p></p>	<p>The ERP is expected to support tracking of required training, including credentials, completion status, and compliance reporting; however, the training content itself is typically managed in a separate system.</p>
<p>Can the COE please clarify how many people are included in each of the groups: core project team, end-users, and technology personnel? (3.7.4 Training Plan, pg24)</p>	<p>The specific counts for core project team members, end-users, and technology personnel have not been finalized at this time.</p>
<p></p>	<p>These numbers will be determined and provided during the implementation planning phase once the project is initiated and detailed staffing and training plans are developed with the selected vendor.</p>
<p>Does SCCOE have an internal training team that can be leveraged for delivering training materials? (3.7.4 Training Plan, pg24)</p>	<p>SCCOE does not have a dedicated internal training team designated to lead ERP training delivery.</p>
<p></p>	<p>We expect the vendor to provide the training as part of the implementation. SCCOE may also consider a train-the-trainer model as an option, where internal staff could be enabled</p>

	to support and deliver training with guidance and materials provided by the vendor.
Can the COE please clarify how the scoring will be impacted in the event that a vendor elects to not include an optional module (as all the optional requirements are currently embedded in the scoring model)? (4.2 Evaluation Selection Process, pg28)	Optional modules will not negatively impact scoring if a vendor elects not to include them. The evaluation scoring will be based on core requirements and required functionality. Optional modules are included for informational and comparison purposes only and will not be held against the scoring model.

+++ END OF ADDENDUM 03 +++