



***GARLAND INDEPENDENT SCHOOL DISTRICT  
PURCHASING DEPARTMENT***

***501 S. Jupiter  
Garland, Texas 75042***

**REQUEST FOR PROPOSAL  
ORACLE UPGRADE SERVICES  
PROPOSAL # 2-21**

**PLEASE SUBMIT PROPOSAL NO LATER THAN 10:30 A.M. CST, NOVEMBER 12, 2020.**

**Mark the sealed return envelope in the lower left hand corner with PROPOSAL#, time, and due date, as noted above. (Should the district close for unforeseen reasons (force majeure) on the date the solicitation is due, the above referenced date should be changed to 10:30 A.M. the first date the district is open to conduct business)**

You are invited to submit a Proposal to provide Oracle Upgrade Services for the Garland Independent School District (GISD).

This Proposal includes Instructions to Vendors, Award/Evaluation of Proposals, Certifications, Terms and Conditions, Compliance Form, Specifications and Form of Agreement. These provisions shall be considered as part of any resulting legal and binding contract/purchase order as if thereto attached or therein repeated.

**THIS RFP WILL NOT BE OPENED OR READ PUBLICLY**

DELIVERY DATE IS \_\_\_\_\_ Business Days ARO  
(After Receipt of Order)

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

\_\_\_\_\_  
Authorized Representative Name \_\_\_\_\_ Title \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name \_\_\_\_\_ Email Address \_\_\_\_\_

\_\_\_\_\_  
Telephone # \_\_\_\_\_ Fax # \_\_\_\_\_

*Mark A. Booker*

Mark A. Booker  
Executive Director of Purchasing

## 1. INSTRUCTIONS TO PROPOSERS

### 1.1 Submission of Proposals

#### 1.1.1. CLARIFICATION OF SPECIFICATIONS

For clarification of the specification(s) of this Request for Proposal, proposers may contact: Janet Curtis-Fuller, Buyer at [jcfuller@garlandisd.net](mailto:jcfuller@garlandisd.net)

+The individual listed above may be contacted for clarification of specification(s) only. No authority is intended or implied that specification(s) may be amended or alternates accepted prior to opening without written approval of the Garland ISD Director of Purchasing.

#### 1.1.2. SUBMITTING QUESTIONS

Suppliers finding errors, requests for additional information, omissions, or corrections shall contact the Purchasing Department Questions by submitting an email to [bids@garlandisd.net](mailto:bids@garlandisd.net) and a copy to [jcfuller@garlandisd.net](mailto:jcfuller@garlandisd.net) no later than **October 20, 2020 at 12:00 P.M, CST.**

#### 1.1.3. ADDENDA

All addenda will be issued as amendments to the Bid(s). All addenda will be posted by **October 26, 2020 at 4:00 P.M., CST.** It is the supplier's responsibility to check the district's website (<http://www.garlandisd.net/connect/do-business/current-opportunities>) for addendums prior to submitting responses.

#### 1.1.4. NUMBER OF COPIES

PLEASE PROVIDE ONE (1) ORIGINAL PROPOSAL RESPONSE AND ONE (1) COPY SUBMITTED ON FLASH DRIVE.  
ENSURE THE SUBMISSION IS CLEARLY LABELED.

**DELIVERY OF PROPOSAL:** Delivery of submission copy must be in accordance with the procedures listed. Mark the sealed return envelope in the lower left hand corner with BID#, time, and due date. If assistance is required for proposal submission, you may call Purchasing at 972.487.3009 during normal operating hours.

Hand-carried submissions must be placed in the exterior bid depository (Purchasing Drop Box) is available at the entrance to the Harris Hill Administrative offices located at the address provided above. The submission must be placed inside the depository at your convenience but no later than 10:15 a.m. on the prescribed due date listed in the solicitation. A submission is considered received when Purchasing retrieves the package from the Purchasing Drop Box and the submission is date/time stamped before the deadline.

Note: Submissions must be sealed and not exceed 14"x10" x 5" to use the Purchasing Drop Box

#### **Proposals submitted via the U. S. Postal Service are to be mailed to:**

Garland ISD Purchasing Department P. O. Box 469026, Garland, Texas 75046-9026

Clearly mark all Proposal envelopes as instructed on the front page. Allow sufficient transit time.

Delivery of submission to other Departments within the District is not considered as delivery to the Purchasing Department. The submission must be date/time stamped by Purchasing before the deadline.

**1.1.5. SIGNED ORIGINAL**

Once completed and signed, return your Proposal form to the Garland ISD Purchasing Department (as instructed above).

**1.1.6. LATE SUBMISSIONS**

Proposals received at the GISD Purchasing Department after the time and date specified above will not be considered and will be filed unopened. The Garland ISD shall not be held liable for late proposals.

**1.1.7. OTHER FORMS OF SUBMISSION**

Oral or telegraphic proposals transmitted via the District's facsimile machine are not acceptable. **DO NOT FAX OR EMAIL YOUR PROPOSALS. Only forms provided by the Garland ISD Purchasing Department may be submitted with this proposal unless written instructions permit additional pages.**

**1.1.8. AUTHORIZED SIGNATURE**

Proposals must be signed by an authorized individual to contractually bind their firm when submitting the Proposal. Failure to sign the Proposal will be considered as a "mistake in Proposal", and the Proposal will be rejected as "non-responsive".

**1.1.9. NUMBER OF PAGES**

All pages of this Request for Proposal are to be returned with your proposal. Proposer shall contact the Purchasing Department if discrepancies exist.

**1.1.10. WITHDRAWING PROPOSALS**

No Proposal may be withdrawn prior to opening of proposals without written request (addressed to the Garland ISD Director of Purchasing) by an authorized agent of the proposing firm and upon written approval by the District. Proposals become the property of Garland ISD upon receipt.

**1.1.11. PROPOSAL TABULATIONS**

Proposers desiring a Proposal tabulation sheet resulting from this Request For Proposal may visit our web site at <http://www.garlandisd.net/connect/do-business/Proposal-tabulations>. The tabulations will be posted once the GISD Board of Trustees has approved the contract. If you are unable to download the information, please contact the Purchasing Department at 972-487-3009 and we will forward you a copy via email.

**1.1.12. DEVIATIONS**

Any and all deviations to this competitive solicitation proposed by the Proposal must be listed on the Compliance Form, not on a cover letter, catalog, etc.

**1.1.13. PUBLIC INFORMATION**

Garland Independent School District is a public entity subject to the provisions of the Texas Public Information Act (Texas Government Code Chapter 552). Responses to this invitation may be subject to release as public information unless the response or specific parts of the response are accepted from public disclosure under such Act. Proposers should consult with their legal counsel regarding disclosure issues and take the appropriate precautions to safeguard trade secrets or any other confidential or proprietary information before responding to this invitation. The District assumes no liability or responsibility for release of any information not properly identified and documented in accordance with the enclosed Confidential Information Declaration & Copyright Authorization Form. The District assumes no liability or responsibility for release of any information that the Texas Attorney General or a court of law determines to be subject to release.

#### **1.1.14. POST-SUBMISSION CHANGES**

A proposal that has been opened may not be changed for the purpose of correcting an error in the proposed price. Proposers submitting an erroneous proposed price may be given the option of either honoring the price as proposed or withdrawing the (erroneous) proposal [Local Government Code Subchapter B, Sec. 271.026].

### **1.2 Award/Evaluation of Proposals**

#### **1.2.1. WAIVING INFORMALITIES**

The Garland Independent School District Board of Trustees reserves the right to accept or reject all or any part of any proposal, waive minor proposal formalities/technicalities and award the proposal deemed to be most advantageous to the District.

#### **1.2.2. PRINCIPAL PLACE OF BUSINESS**

The Garland ISD shall not award a governmental contract to a proposer whose principal place of business is not in Texas, unless the nonresident under prices the lowest proposal submitted by a responsible resident proposer by an amount that is not less than the amount by which a resident Proposer would be required to under price a nonresident proposer to obtain a comparable contract in the state in which the nonresident's principal place of business is located. [This requirement does not apply to a contract involving federal funds.]; Texas Government Code, Title 10, Section 2252.002. (Refer to Supplier Questionnaire)

#### **1.2.3. MULTIPLE AWARDS**

The District reserves the right to award to a single vendor, multiple vendors, each line item separately or in any combination it determines to be in its best interest. Proposals shall cover the entire program as described herein. Proposers shall also include copies of any contracts/agreements required (by the proposing firm) and clearly identify/label it as such.

#### **1.2.4. TIE PROPOSALS/EVALUATION FACTORS**

Tie proposals, which are **equal in all respects**, shall be resolved and awarded in accordance with Local Government Code (Texas) Para. 271.901. Otherwise proposals, which reflect a tie in price, only may be awarded pursuant to the permissible factors listed in Texas Education Code, Subchapter B, Sec. 44.031(b) and set forth below:

1. the purchase price;
2. the reputation of the vendor and of the vendor's goods or services;
3. the quality of the vendor's goods or services;
4. the extent to which the goods or services meet the district's needs;
5. the vendor's past relationship with the district;
6. the impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses;
7. the total long-term cost to the district to acquire the vendor's goods or services; [and]
8. for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner:
  - a. has its principal place of business in this state; or
  - b. employs at least 500 persons in this state; and
9. **Per Texas Education Code, Subchapter B, Sec. 44.031(b) \*ALL CONTENTS PROVIDED IN THIS SOLICITATION, WILL BE CONSIDERED AS AN EVALUATION FACTOR!**
10. In compliance with the provisions of Texas Government Code, Title 10, Subtitle D, Section 2155.074, Section 2155.075, Section 2156.007, Section 2157.003 and Section 2157.125, and Texas Administrative Code, Title 1, Chapter 113.6,

information obtained from the Texas Building and Procurement Commission's Proposer Performance Tracking System may be used in evaluating responses to solicitations for goods and services to determine the best value for the Garland Independent School District.

[www.window.state.tx.us/procurement/prog/vendor\\_performance](http://www.window.state.tx.us/procurement/prog/vendor_performance)

#### **1.2.5. BOARD OF TRUSTEE APPROVAL**

Proposal results will be presented to the GISD Board of Trustees for consideration (if total amount awarded exceeds \$75,000) at the earliest opportunity following the official opening date. The estimated value of this contract is \$1,000,000 - \$2,000,000; however, this value reflects the District's estimated current requirements for entire contract term (or time frame as otherwise specified). The District may elect to place several orders during the term of this Request for Proposal.

#### **1.2.6. ADDITIONS OR IMPROVEMENTS**

Proposers and prospective proposers are encouraged to suggest improved product and/or services for future consideration by the District. Any literature/brochures regarding such products or services should be submitted separately from the proposal submitted in response to this Request for Proposal.

#### **1.2.7. UNIT OF MEASURE**

Each line item must be proposed using the same unit of measure as requested by this Request for Proposal. Any questions regarding unit of measure must be resolved between the prospective proposer and the Garland Independent School District Purchasing Department. Failure to propose specified unit of measure may be cause for rejection of proposal for the specific item(s) in question. Any packaging proposed which differs from that specified in the item description must be identified on the Deviation/Compliance Form.

#### **1.2.8. FELONY CONVICTIONS**

Upon notification of potential selections for award, the person or entity submitting this proposal must give notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in this conviction of a felony (this requirement does not apply to a publicly held corporation).

#### **1.2.9. ALTERNATE AWARDS**

The District awards contracts to vendors as an alternate in case the primary vendor is unable to fulfill the contractual obligations as stated in the specifications/terms and conditions.

#### **1.2.10. PRICE ESCALATION PROVISIONS**

The District may elect to place several orders during the term of this Request for Proposal. Proposers must specify minimum order quantities – if any – and are required to hold proposed prices for the entire term of the contract.

### **2. CERTIFICATIONS**

#### **2.1. CERTIFICATION AFFIRMATIONS**

By signing this Request for Proposal, the signed proposer affirms and certifies that its company, corporation, firm, partnership or individual's response to this proposal is in all respects compliant with all provisions in this section.

#### **2.1.1. ANTI-COLLUSION AND FRAUD**

Proposer affirms that its company, corporation, firm, partnership or individuals response to this proposal is in all respects bona fide, fair and was not made with collusion or fraud with

any person, joint venture, partnership, corporation or other legal entity engaged in this type of business prior to the official opening of this proposal.

#### **2.1.2. DEBARMENT AND SUSPENSION (Executive Orders 12549 and 12689)**

A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide Excluded Parties List System in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1986 Comp., p. 189) and 12689 (3 CFR Part 1989 Comp., p. 235), "Debarment and Suspension." The Excluded Parties List System in SAM contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Proposer certifies that the individual and/or firm on whose behalf this proposal is submitted is not listed on the Federal Government's excluded parties list (SAM).

#### **2.1.3. SOLE SOURCE**

If the proposer professes to be the exclusive source of the item(s) or service(s) requested herein, the proposer must provide with its proposal a written statement to the fact that the sole source is due to one or more of the following (as applicable): a patent, copyright, secret process, or monopoly; a film, manuscript, or book; a utility service (electricity, gas, or water); or a captive replacement part or component for equipment. Such statements must be signed by the owner or corporate official of the firm submitting this proposal and must be notarized. This declaration shall not exempt the proposer from signing and submitting a signed proposal.

#### **2.1.4. PUBLIC INFORMATION**

By submitting a response to this request, proposer represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code, Disclosure of Certain Relationships with Local Government Officers; Providing Public Access to Certain Information. A list of local government Officers may be obtained at <http://www.garlandisd.net/content/conflict-disclosure>. Failure to comply with this provision may result in the bid being considered non-responsive.

### **3. TERMS AND CONDITIONS**

#### **3.1. PURCHASE ORDERS AND CONFIRMATION**

The Garland Independent School District will email purchase orders in lieu of facsimile transmission. In addition to purchase orders, all solicitation notices, and award notifications will be communicated by email. Purchase Orders will be placed as items are approved for purchase and funds become available.

#### **3.2. NO SMOKING POLICY**

No smoking or use of any tobacco products is permitted on school property.

#### **3.3. AUTHORIZED NEGOTIATORS**

Designated GISD Purchasing Department personnel are the only individuals allowed to negotiate contract agreements/terms & conditions and/or pricing before an award is made as well as after an award has been made. Firms hereby agree that any negotiations regarding this RFP pertaining to agreements/terms & conditions and/or pricing shall be between proposing firm and the Purchasing Department ONLY throughout the term of the contract.

#### **3.4. FORCE MAJEURE**

Neither party shall be liable for delay in delivery or performance or for failure to give notice of delay when such delay is due to factors beyond its control, including, but not limited to, fires, strikes, explosions, governmental regulations, court orders or decrees, or acts of nature such as flood, wind, earthquake, tornado or hurricane. If the Proposer is unable to perform any of its obligations as a

result of force majeure, proposer shall immediately give written notice to the District of the date of inception of the force majeure condition and the extent to which it will affect performance.

**3.5. TEXAS HOUSE BILL 1295, CERTIFICATE OF INTERESTED PARTIES**

If the individual contract/award exceeds \$1,000.000 or goes to the Board of Trustees, the person or entity submitting this proposal must comply with House Bill 1295 which is codified in the Texas Government Code §2252.908 effective January 1, 2016, by submitting a completed and signed Form 1295, Certificate of Interested Parties within 10 days after notification of intent to award. The appropriate form and additional information is available from the Texas Ethics commission at [www.ethics.state.tx.us/index.html](http://www.ethics.state.tx.us/index.html).

**END OF SECTION**

**PROPOSAL #2-21**  
**ORACLE UPGRADE SERVICES**

## **1. Introduction**

The Garland Independent School District (GISD) is seeking qualified firms to provide a range of consulting services for multiple scopes of work to be performed over phases. Provided in this RFP is a breakdown of GISD's current environment, requirements and services desired for the scopes of work, and the RFP preparation and submission requirements.

The awarded firm and/or partners shall be capable of providing a diverse range of consultants specializing in project management, functional and technical consulting services. The firm should have a proven history of assessing, implementing, configuring, upgrading and enhancing the Oracle E-Business (EBS) Suite, Oracle Fusion Middleware, Oracle Database, and all interrelated components of the associated technology stack.

GISD's preference is for respondents to propose a single, consolidated bid and solution design for all scopes of work contained in this RFP. As such, GISD prefers to award a single prime contractor and, where necessary, encourages respondents to utilize partners to meet any gaps in requirements. Notwithstanding, GISD reserves the right to award this proposal in the best interest of the District.

## **2. Background and Current Environment**

GISD is the 12th largest school district in Texas. The District enrolls approximately 55,000 students and has over 8,000 employees. Facilities are spread across 94 square miles in 3 cities, consisting of 72 campuses and 10 administrative facilities.

### **2.1. Current Software and Technology Stack**

GISD first implemented Oracle E-Business Suite (EBS) in 2004, with Oracle Financials, Human Capital Management, and Supply Chain Management suites. Over the years, new modules have been implemented and business functionality expanded. Currently, GISD runs Oracle EBS r12.1.3 on-premise, with 1 production environment (PROD) and 4 non-production environments (PATCH, DEVL, TEST, QA). The following tables provide an overview of the technology stack.

<b>Oracle EBS Applications (r12.1.3, on-premise)</b>	
General Ledger	Human Resources
Payables	Payroll
Receivables	Advanced Benefits
Projects	Employee Self-Service
Cash Management	Manager Self-Service
Fixed Assets	iProcurement
Purchasing	iExpense
Order Management	iSupplier
Inventory	Sourcing
User Productivity Kit	Approvals Management Engine
<b>Oracle Planning and Budgeting Cloud Service</b>	
Oracle PBCS	
<b>Fusion Middleware (on-premise)</b>	
Oracle BI Discoverer	10g (10.1.2)
OBIEE	11g (11.1.1.9)

OBIA	11g (11.1.1.9)
Oracle Forms	10g (10.1.2.3)
Oracle Reports	10g (10.1.2.3)
Java	v7 Update 67 (1.7.0_67)
<b>Oracle EBS Platform (on-premise)</b>	
H/W – UCS B200 M4	3 tiers - DB, App, DMZ
OS – Oracle Enterprise Linux	DB - OEL 6.7, App OEL 6.10, DMZ OEL 6.10
Oracle RDBMS	12c (12.1.0.2)
SAN	XIO
<b>OBIEE Platform (on-premise)</b>	
H/W – UCS B200 M4	3 tiers - DB, App, DMZ
OS – Oracle Enterprise Linux	OEL 6.7
Oracle RDBMS	11g
<b>APEX Platforms (on-premise)</b>	
VM – VMWare (Host 1)	
OS – Oracle Enterprise Linux	OEL 6.7
Oracle RDBMS	18c
VM – VMWare (Host 2)	
OS – Oracle Enterprise Linux	OEL 5.8
Oracle RDBMS	4

## 2.2. CEMLI's

Following is intended to assist with the general understanding of GISD's Customizations, Extensions, Modifications, Localizations, and Integrations (CEMLI's). It is not an exhaustive list, however, provides the overall breadth of customizations to be considered in the context of the EBS upgrade. Included within these numbers, GISD supports approximately 35 data integrations with the Oracle EBS.

<b>CEMLI's</b>	
Alerts	14
Forms (FMB)	5
Reports – BI XML Publisher	40
Reports – Oracle (RDF)	30
Concurrent Programs	221
Workflows	5
<b>Custom Database Objects</b>	
Package	225
Procedure	78
Function	55
Table	350
Trigger	4
View	312
Materialized View	13

## 2.3. BI Discoverer Current State

GISD has been utilizing Oracle BI Discoverer for reporting against the Oracle EBS since 2005. There have been a number of cleanup and consolidation efforts through the years, leading to a fairly minimal and clean set of reports available to and used by end users.

Following is intended to assist with the general understanding of GISD's current state of BI Discoverer. It is not an exhaustive list, however, provides the overall breadth of reporting to be considered for replacement on the OBIEE reporting platform. The majority of BI Discoverer reports are operational in nature. They are largely based upon custom views, versus the standard Discoverer End User Layer (EUL), and are secured by a handful of EBS responsibilities. Oracle Discoverer currently serves about 50 users, spanning areas of Financials, Procurement, and Human Capital Management.

BI Discoverer Report Inventory	
Financials	35
Procurement	15
Human Capital Management	50

#### 2.4. iProcurement Document Approval Flows (AME) Current State

Over five years ago, GISD enhanced iProcurement requisition approval flows through the implementation of Approvals Management Engine (AME). While this has served the District well in terms of routing requisitions to the appropriate authority, maintenance and support have become very cumbersome, especially during peak personnel season from May – September, as a significant portion of the workforce is being hired, moved, or leaving the District.

In its entirety, GISD has a couple hundred iProcurement AME rules that must be actively maintained. Most are standard flows that utilize a combination of the position hierarchy, appropriate authority levels and spending limits. However, there are also numerous special requirements for requisition flows across several key departments and functions. These exception or outlier flows address policies around technology software/hardware purchases and also federal funding sources serving departments like Special Programs, Student Nutrition, and others.

### 3. Requirements and Scope of Work

GISD has identified the following high-level scopes of work and projects to be implemented over two phases. While GISD has an in-house IT team of Oracle EBS functional and technical support resources, the primary focus of those resources will be ongoing support and operations of the current ERP environment. Those resources will serve on the project in a supplementary role, on an availability basis.

Phase	Project	Description	Est. Go-Live
Phase 1	ERP Assessment and Upgrade	Assessment and Upgrade of Oracle E-Business Suite (EBS) to Release 12.2.x	11/29/2021
	Enterprise Reporting Tool Solution	Assessment and Upgrade of Oracle Business Intelligence Enterprise Edition (OBIEE) solution; replace Oracle BI Discoverer reports with OBIEE reporting solution	11/29/2021
	Assessment, Upgrade and Deploy		
Phase 2	Assess and Streamline Document Approval Flows	Assess and Streamline iProcurement Document Approval Flows Utilizing Approvals Management Engine (AME)	3/7/2022

At the time of releasing this RFP, Oracle EBS release 12.1.3 will move into Sustaining Support after December 31, 2021 (per Oracle Lifetime Support Policy). GISD's objectives are to maintain Premier Support standing for the Oracle EBS in addition to seeking out opportunities to innovate and optimize

business enablement. As such, Phase 1 projects would commence with an assessment of the current/future state and follow with recommendations and upgrade to EBS r12.2.x.

Also included in Phase 1, GISD's current reporting solution, Oracle BI Discoverer, will no longer be compatible with EBS r12.2.x and must be replaced with an alternate reporting solution. GISD seeks an assessment of its reporting needs and an upgrade to the latest release of OBIEE, the in-house reporting platform alternative to BI Discoverer. Using the reporting needs assessment as input, GISD will then require assistance with replacing existing BI Discoverer reports on the upgraded OBIEE reporting platform.

In order to maintain Premier Support and avoid moving to Sustaining Support, **both Phase 1 projects must be complete by December 31, 2021. As a risk mitigation strategy, projects are to remain well ahead of this deadline and GISD is looking for a firm that is confident in delivering Phase 1 projects within 7 – 9 months, preferably with go-live by 11/29/2021.** Therefore, GISD requires a consulting partner that has proven, premier experience with Oracle EBS and OBIEE upgrades and implementations. Moreover, GISD is seeking firms that have experience with accelerated upgrade timelines and a historical track record of delivering similar projects on time, on budget, and within scope.

After Phase 1 is complete, GISD is looking to shift focus in Phase 2 with the assessment and streamlining of iProcurement Requisition document approval flows, using Oracle's Approvals Management Engine (AME). Phase 2 will not begin until Phase 1 has been successfully completed.

The following sections contain detailed requirements for the various phases and projects.

### **3.1. ERP Assessment and Upgrade (Phase 1)**

**3.1.1. Assessment** – Conduct a thorough business and technical needs assessment of the District's current Oracle EBS operating environment and provide recommendations for innovation and business enablement through an upgrade to Oracle EBS r12.2.x. Assessment should address the following minimum requirements:

#### **3.1.1.1. Project Management**

**3.1.1.1.1. Scope of Work**

**3.1.1.1.2. Project Plan and Resources** – Specifically address time requirements and associated tasks for GISD personnel responsible for participating in the upgrade

**3.1.1.1.3. Risk Analysis** - Potential risk and associated mitigation factors which would hinder upgrade to r12.2.x by the outlined target dates

**3.1.1.1.3.1.** There exists a reasonable risk of the project being delayed or not completed by the 12/31/2021 end of Premier Support date. If so, GISD is in a position of no longer receiving any new Tax, Legal, Regulatory Updates, Security Alerts, Critical Patch Updates, and Critical Bug Fixes. **Provide a reasonable risk mitigation strategy for bridging critical patching.** For example, Oracle

Advanced Customer Services (ACS) Market-Driven Support product offering should be considered if the upgrade project is delayed and/or a move beyond Premier Support is projected. A vital pre-requisite for ACS Market-Driven Support requires the customer to be on Oracle Database 19c. If so, does this information alter the upgrade approach from a 19c/12.2.x simultaneous upgrade go-live, to a split/phased 19c upgrade go-live (early on) and then a 12.2.x upgrade go-live (later on)?

### **3.1.1.2. Functional**

**3.1.1.2.1.** Gaps/Opportunities – identify/review both existing and new r12.1.3 through r12.2.x features that could benefit GISD operations

**3.1.1.2.2.** Process Analysis - Provide recommendations on both required and optional business process changes, as a result of upgrading to r12.2.x

### **3.1.1.3. Technical**

**3.1.1.3.1.** Infrastructure – technology stack needs and sizing, including storage, compute, memory; hardware, OS, security, database, middleware, and applications

**3.1.1.3.2.** Environment/Cloning Strategy – non-production environment needs for conducting the r12.2.x upgrade

**3.1.1.3.3.** CEML's – customization inventory and analysis (remediation)

**3.1.1.3.4.** Licensing – inventory and analysis of licensing and opportunities for optimization

### **3.1.1.4. Testing and Training**

**3.1.1.4.1.** Testing – assess existing test scripts and identify test strategy

**3.1.1.4.2.** Training – identify r12.1.3 – r12.2.x delta training and training strategy; differentiate areas in which training is required for business versus IT personnel; GISD will utilize a train-the-trainer delivery model, with exception of technical training.

**3.1.2. Upgrade** – using output from upgrade assessment, solidify recommendations, future state decisions, plan and execute upgrade project to Oracle EBS r12.2.x

**3.1.2.1. Support** – provide up to three weeks of post go-live support, as needed

## **3.2. Enterprise Reporting Tool Solution Assessment, Upgrade and Deploy (Phase 1)**

**3.2.1. Assessment** – Conduct a thorough business and technical needs assessment of the District's current reporting needs and targeted solution. Provide recommendations for replacement of BI Discoverer with existing in-house OBIEE reporting platform. Assessment should address the following minimum requirements:

### **3.2.1.1. Project Management**

**3.2.1.1.1.** Scope of Work

**3.2.1.1.2.** Project Plan and Resources – Specifically address time requirements and associated tasks for GISD personnel responsible for participating in the upgrade and reporting solution replacement

**3.2.1.1.3.** Risk Analysis - Potential risk and associated mitigation factors which would hinder project go-live by the outlined target dates; must be completed in parallel or advance of Oracle EBS r12.2.x go-live

### **3.2.1.2. Functional**

**3.2.1.2.1.** Assess reporting requirements, feasibility and fit of GISD's current plan of replacing BI Discoverer reports on OBIEE reporting platform; also up for consideration is the currently licensed OBIA

**3.2.1.2.2.** High-level advantages/disadvantages of alternative reporting solutions for Oracle EBS r12.2.x

**3.2.1.2.3.** Inventory of Reports, Proof of Concept, and Product Demonstrations

**3.2.1.2.4.** Gaps/Opportunities – identify/review both existing and new 11g through 12c major features that could benefit GISD reporting solution

### **3.2.1.3. Technical**

**3.2.1.3.1.** Technical Solution Design – recommendation and best practices for solution design of OBIEE reporting platform; methodologies for "lift and shift" of BI Discoverer reports

**3.2.1.3.2.** Infrastructure – technology stack needs and sizing, including storage, compute, memory; hardware, OS, security, database, and middleware

3.2.1.3.3. Environment/Cloning Strategy – non-production environment needs for conducting the 12c upgrade

3.2.1.3.4. Licensing – inventory and analysis of licensing and opportunities for optimization

#### 3.2.1.4. Testing and Training

3.2.1.4.1. Testing – identify test strategy

3.2.1.4.2. Training – identify 11g – 12c delta training and training strategy; differentiate areas in which training is required for business versus IT personnel; GISD will utilize a train-the-trainer delivery model, with exception of technical training.

3.2.2. Upgrade and Deploy – solidify recommendations, future state decisions, execute upgrade project and deploy reports to OBIEE 12c, or recommended solution

3.2.2.1. Support – provide up to three weeks of post go-live support, as needed

### 3.3. Assess and Streamline Document Approval Flows (Phase 2)

Given the constraints of the current iProcurement Requisition approvals solution, GISD's primary goal is to balance improvements for timing of Requisition to Purchase Order, ensure overall District approval requirements are being met, while improving support and sustainability of the approval solution.

3.3.1. Assessment – Conduct a thorough business and technical needs assessment of the District's current iProcurement Requisition approval flow needs and solution. Provide recommendations for design of new approval flows. Assessment should address the following minimum requirements:

#### 3.3.1.1. Project Management

3.3.1.1.1. Scope of Work

3.3.1.1.2. Project Plan and Resources

#### 3.3.1.2. Functional

3.3.1.2.1. Assess approval requirements – re-baseline approval requirements, refine, standardize and streamline approvals across all campuses and departments and special business flows

3.3.1.2.2. Inventory of Approval Flows

3.3.1.2.3. Considerations

3.3.1.2.3.1. Approvals must be implemented in a manner that meet the business requirements, while also being standardized, scalable, supportable and sustainable, particularly during peak personnel season of May – September

3.3.1.2.3.2. High-level understanding of GISD's other document approval flows and how requisition approvals will align or differ; consider/seek standards for positions, authority levels, and spending limits for authorization to spend/procure

3.3.1.2.3.3. Supplier requisitions versus Internal (Warehouse) requisitions

3.3.1.2.3.4. Special funding source approval requirements

3.3.1.2.3.5. If possible, any special approval flows (outliers) should be closely reviewed and either justified, or eliminated

3.3.1.2.3.6. Minimize the number of approvers in the flow, separating those that need to provide authorization of the requisition, from those that simply need to be informed; consider an alternate solution (e.g., reporting, notifications) for those that only need to be informed

#### 3.3.1.3. Technical

3.3.1.3.1. Technical Solution Design – identify best technical approaches to meet GISD's business and support goals, AME or otherwise

3.3.1.3.2. Considerations

3.3.1.3.2.1. Minimize the overall amount of logic and number of rules; rules and logic must be dynamic in nature, versus static and/or hardcoded

#### 3.3.1.4. Testing and Training

3.3.1.4.1. Testing – identify test strategy

**3.3.1.4.2.** Training – identify delta training and training strategy for technology staff

**3.3.2. Streamline/Deploy** – solidify recommendations, future state decisions and execute approvals deployment project

**3.3.2.1. Support** – provide up to three weeks of post go-live support, as needed

#### **3.4. Potential for On-Site Personnel**

**3.4.1.** To minimize overall cost, GISD is open to the respondent's project team working remotely/offsite, while only coming onsite during key phases of the project. Remote offshore work, outside of the United States, is not being allowed or considered for this engagement.

**3.4.2.** GISD is interested in proposals from vendors that are willing to provide a portion of their key resources on-site. Potential for on-site opportunities include:

**3.4.2.1.** Key resources (Project Manager, Functional Lead, and Technical Lead) on-site during project kick-off week

**3.4.2.2.** Project Manager on-site 2 – 4 days surrounding key project milestones and/or once per month, e.g., project kick-off, business process requirements deliverables, Conference Room Pilot (CRP) and/or User Acceptance Testing (UAT), Training, and Go-Live

### **4. Proposal Responses**

#### **4.1. Proposal Format**

**4.1.1.** Respondents must submit proposals, as follows:

- The proposal must include one (1) original in a sealed package or box, clearly labeled with RFP number and name as well as the company name. Original should be in a 3-ring binder divided into sections by tab index sheets (see Tab Labels section below).
- An electronic version of the proposal must also be submitted with the original. Electronic media must be a USB drive and shall have a label on the outside containing the RFP number and name as well as the name of the company name.

**4.1.2. Proposal - Tab Labels**

Response to Proposals must be formatted according to the table below. Additionally, all responses to specifications within a tab (section) must adhere to the respective numbering provided in this RFP.

Failure to provide any of the requested information or documents in this solicitation, and in the prescribed format, may disqualify the bid.

<b>Tab Number</b>	<b>Tab Description</b>
Tab 1	Transmittal Letter
Tab 2	Table of Contents
Tab 3	Company Profile and Qualifications
Tab 4	Overview and Approach to Implementation
Tab 5	Alternate Proposed Products and Services
Tab 6	Exceptions to RFP and Conflicts of Interest
Tab 7	Required Forms
Tab 8	Price Proposal

#### **4.2. Transmittal Letter (Tab1)**

Provide a brief transmittal letter prepared on the respondent's letterhead and signed by an individual who is authorized to commit the respondent to the services and requirements in the RFP and proposal. This transmittal letter shall include:

- Your understanding of the scope of work and timeline requirements
- Why the firm believes it is best qualified to perform the engagement
- How your firm will differentiate meet GISD's objective of a Phase 1 go-live by 11/29/2021
- Your firm's experience with accelerated upgrade timelines and a historical track record of delivering similar projects on time, on budget, and within scope.
- Acknowledgement that you meet all minimum eligibility criteria required for this RFP

- A statement of the ability to comply with all terms and conditions of this RFP and your acceptance of the format/terms and conditions of the agreement, and whether exceptions/deviations are being taken
- Acknowledgement of all Addenda to this RFP
- The name, title, address, telephone number, and email address of the person authorized to bind the respondent to the contract and who will receive all official notices concerning this RFP.

#### **4.3. Table of Contents (Tab 2)**

**4.3.1.** The Table of Contents and proposal must conform to the order, headings, and sub-headings of this RFP as appropriate.

#### **4.4. Company Profile and Qualifications (Tab 3)**

##### **4.4.1. Proposer Business Information**

- 4.4.1.1.** Company name, parent company name
- 4.4.1.2.** Address, city, state, and zip code of business offices
- 4.4.1.3.** Accounts receivable contact name, title, phone, email, address, city, state, and zip code
- 4.4.1.4.** Account executive name, title, phone, email, address, city, state and zip code
- 4.4.1.5.** Primary project contact name, title, phone, email, address, city, state, and zip code
- 4.4.1.6.** Federal Tax ID number
- 4.4.1.7.** Include a copy of Dun & Bradstreet's Comprehensive Report on the company issued within the last 12 months
- 4.4.1.8.** Identify HUB certification

##### **4.4.2. Proposer Business Description**

- 4.4.2.1.** State the nature and scope of the business, including areas of expertise and specializations
- 4.4.2.2.** Business philosophy and mission statement
- 4.4.2.3.** Number of years the firm has been in business
- 4.4.2.4.** Number of years the firm has been licensed to do business in the State of Texas
- 4.4.2.5.** Number of employees in the firm
- 4.4.2.6.** Number of employees in the firm dedicated to the Scope of Work contained in this RFP
- 4.4.2.7.** A brief organizational chart showing the positions that will be involved with this project
- 4.4.2.8.** Approach to knowledge acquisition and evaluation of new technologies within your firm; Indicate what procedures are in place to maintain the base of knowledge in the firm
- 4.4.2.9.** State whether the organization pursues business on a national, regional, or local scale
- 4.4.2.10.** Identify any claims during the past five (5) years and provide information on any pending litigation, lawsuits etc. Failure to provide accurate information may be determined to be a material breach of any future agreement or contract with the District.

##### **4.4.3. Experience and Other Qualifications**

- 4.4.3.1.** Describe the experience your firm has for this project, as identified in the Scope of Work. Specifically demonstrate the firms' previous experience with Oracle EBS 12.2.x upgrades, OBIEE/OBIA/OAS implementations and upgrades, and streamlining approval flows with Approvals Management Engine (AME). Provide evidence with case studies and/or client highlights.
- 4.4.3.2.** Indicate any relevant Oracle Partner or Consultant certifications.
- 4.4.3.3.** Provide the firms' total number of Oracle EBS 12.2.x upgrades in past 5 years, with numbers broken down as follows:

<b>Oracle EBS 12.2.x Upgrades in Past 5 years</b>		
<b>Sector</b>	<b>Example</b>	<b>Respondent Count</b>
K12 Education	5	
Higher Education	10	
Other Public Sector	15	
<b>Total Public Sector</b>	<b>30</b>	
Private Sector	20	
<b>Total Upgrades</b>	<b>50</b>	

**4.4.3.4.** Provide the firms' total number of Oracle OBIEE/OBIA/OAS implementations and/or upgrades in past 5 years, with numbers broken down as follows:

Oracle OBIEE/OBIA/OAS Projects in Past 5 years		
Sector	Example	Respondent Count
K12 Education	5	
Higher Education	10	
Other Public Sector	15	
<b>Total Public Sector</b>	<b>30</b>	
Private Sector	20	
<b>Total Projects</b>	<b>50</b>	

**4.4.3.5.** Provide the firms' total number of consulting engagements involving AME in the past 5 years, with numbers broken down as follows:

Oracle AME Consulting Engagements in Past 5 years		
AME Type	Example	Respondent Count
iProcurement	3	
Other	7	
<b>Total AME Engagements</b>	<b>10</b>	

#### **4.4.4. References**

Submit references (see **Appendix A - References**) for at least five (5) of the most similar contracts (per the Scope of Work), preferably K-12 education, higher education, or other governmental agencies, or related engagements that your firm has completed within the past five (5) years. REFERENCES WILL BE CONTACTED AND SCORED.

#### **4.4.5. Past Relationship with District**

**4.4.5.1.** Please describe any delivery of goods or services or other relationship your organization has had with GISD in the past. Indicate the type of service and dates for any work conducted.

### **4.5. Overview and Approach to Implementation (Tab 4)**

#### **4.5.1. Overview of Solution**

**4.5.1.1.** Provide a summary narrative of the solution(s). Describe the methodology, approach and processes you would use to complete each project's objectives and tasks outlined in the Scope of Work. Specifically highlight the required minimum number of months in order to comfortably meet the requirements in the expected timeline. Provide your recommendation (and assumptions) to achieving go-live under Premier Support, or a reasonable alternative solution in bridging critical patching.

#### **4.5.2. Proposed Project Team**

**4.5.2.1.** Identify and describe all required project team members, by role, as required to address each project in the Scope of Work. Propose the breakdown of FTE's (both on-site and off-site) for the project manager and all other team members. Address responsibilities and time commitments for each individual team member and duration of service.

**4.5.2.2.** Provide resumes and qualifications of the project manager and all team members that will have a direct role in the delivery and supervision each project. Demonstrate their experience and technical capabilities for a successful implementation.

#### **4.5.3. Detailed Project Plan**

**4.5.3.1.** Provide a detailed project plan for all services to meet each of GISD's projects in the Scope of Work. The respondent must provide its proposed project work plans, preferably in Microsoft Project. The awarded vendor will be responsible for the development and maintenance of a detailed work breakdown structure that must include, but is not limited to, the identification and definition of all project phases, stages, and tasks. The respective start dates, duration of tasks, dependencies of tasks, critical path, milestones, deliverable due dates, and responsible resources (roles) should also be included. For Phase 1, ensure the project plan addresses your strategy for bridging critical patching, e.g., one or two go-lives.

**4.5.3.2.** District Blackout Dates – the District is closed on the following dates; these dates should be taken into consideration by the respondent and incorporated into the project plan (see <http://www.garlandisd.net/content/school-year-calendar> for District calendar):

Event	Date(s)
Spring Break	3/15/21 – 3/19/21
Student/Staff Holiday	4/2/21
Student/Staff Holiday	5/28/21
Memorial Day	5/31/21
Summer Break	7/5/21 – 7/9/21
Labor Day	9/6/21
Fall Break	10/4/21 – 10/8/21
Thanksgiving Break	11/22/21 – 11/26/21
Winter Break	12/20/21 – 12/31/21
Martin Luther King, Jr Day	1/17/22

**4.5.4. Project Plan Management Approach**

**4.5.4.1.** Describe the proposed approach to effectively managing the project work plans. At a minimum, the proposer must describe the method for ensuring timely updates to the work plan, the approach for managing and communicating changes to GISD, and the approach for tracking baseline versus actual progress or the methods and procedures employed in other upgrades and implementations.

**4.5.4.2.** Project Controlling/Reporting - During the term of this agreement, the awarded vendor shall deliver weekly status reports to GISD's Project Sponsor and Project Manager summarizing project progress during the preceding week, including issues and risks that could delay the vendor's performance of anticipated activities during the upcoming month. At a minimum, the status report shall include: (i) the current status of project progress; (ii) all actual delays; (iii) all anticipated delays; and (iv) other information as GISD may reasonably request. GISD shall have the right to assume vendor does not know of any problems, difficulties, or issues that may have an adverse impact on the projects (whether from a timing, cost, scope, or quality/performance standpoint) unless the vendor specifically identifies such issues in its written status reports. Please indicate your compliance with this requirement.

**4.5.5. Risk Management Approach**

**4.5.5.1.** Describe the proposed approach to risk management. At a minimum, the proposer must describe its approach to risk identification, risk analysis, risk response development, risk monitoring and control or the methods employed in other upgrades.

**4.5.5.2.** There exists a reasonable risk of the project being delayed or not completed by the 12/31/2021 end of Premier Support date. If so, GISD is in a position of no longer receiving any new Tax, Legal, Regulatory Updates, Security Alerts, Critical Patch Updates, and Critical Bug Fixes. **Provide a reasonable risk mitigation strategy for bridging critical patching.** For example, Oracle Advanced Customer Services (ACS) Market-Driven Support product offering should be considered if the upgrade project is delayed and/or a move beyond Premier Support is projected. A vital pre-requisite for ACS Market-Driven Support requires the customer to be on Oracle Database 19c. If so, does this information alter the upgrade approach from a 19c/12.2.x simultaneous upgrade go-live, to a split/phased 19c upgrade go-live (early on) and then a 12.2.x upgrade go-live (later on)?

**4.5.6. Change Management Approach**

**4.5.6.1.** Describe the proposed approach to change management regarding organizational, business process and/or systems changes resulting from the Scope of Work. At a minimum, the proposer must describe the framework and approach to change identification, analysis and implementation or the methods employed in other upgrades.

**4.5.6.2.** Describe the proposed approach to project change management as it relates to managing the Scope of Work. At a minimum, the proposer must describe the change control system to be used and its approach to change identification, impact evaluation, change authorization, and change implementation or the methods employed in other upgrades. See **Exhibit A – Change Order Request Form** as a template to be used for this engagement.

**4.5.7. Issue Management Approach**

**4.5.7.1.** Describe the proposed approach to issues management. At a minimum, the proposer must describe the issue management control system to be used and its approach to issue identification, impact evaluation, issue assignment, issue resolution, or the methods employed in other upgrades.

**4.5.8. Quality Management Approach**

**4.5.8.1.** Describe the proposed approach to quality management. At a minimum, the proposer must describe its approach to quality planning, quality assurance, and quality control, or the methods employed in other upgrades.

**4.5.8.2.** Describe the testing methodology, Conference Room Pilots (CRP), and User Acceptance Testing (UAT). How do you ensure the configured/upgraded system will perform according to key business process requirements?

**4.5.9. Knowledge Transfer Approach**

**4.5.9.1.** Describe the proposed approach to facilitating knowledge transfer to GISD staff.

**4.5.9.2.** Describe the proposed approach for train-the-trainer deployment method.

**4.5.9.3.** Describe the proposed approach for technical team training and knowledge transfer.

**4.5.10. Communications Plan**

**4.5.10.1.** Describe the proposed approach for communication to all affected stakeholders.

**4.6. Additional Proposed Services or Products (Tab 5)**

**4.6.1.** Respondent may use this section to optionally propose any additional services or products not included in the requested Scopes of Work. Explain the rationale for the additional services and/or products and any impact if not provided. Price proposals for the additional services or products shall also be included in **Appendix B – Price Proposal Form**.

**4.7. Exceptions to RFP and Conflicts of Interest (Tab 6)**

**4.7.1.** Note Exceptions - Note any exceptions to the requirements and conditions where applicable. Indicate the specific section in this RFP to which the exception applies. If exceptions are NOT noted here, the District assumes that the respondent's proposal meets stated requirements and any discovered deviation may result in disqualification of the proposal.

**4.7.2.** Conflict of Interest - Address the potential, if any, for conflict of interest. Comply with federal, state, and local laws, statutes and regulations, in particular, those addressing conflict of interest.

**4.8. Required Forms (Tab 7)**

**4.8.1.** Provide required forms (**see Appendix D – Required Forms**):

**4.8.1.1.** Compliance Form

**4.8.1.2.** Certification for Criminal History Check

**4.8.1.3.** Confidential Information Declaration & Copyright Authorization Form

**4.8.1.4.** Insurance Requirements

**4.9. Price Proposal (Tab 8)**

**4.9.1.** Complete the Price Proposal Form (**see Appendix B - Price Proposal Form**)

**4.9.2.** Provide a proposed payment schedule, by Phase, that is aligned with milestone events, as identified in the Detailed Project Plan(s).

**4.9.3.** Complete the Schedule of Rates Form (**see Appendix C – Schedule of Rates Form**)

## **5. Minimum Eligibility Qualifications**

In order to be considered for further evaluation and award, respondent must meet or exceed minimum eligibility qualifications. Failure to comply with the following qualifications will disqualify the proposal and will suspend further consideration of the RFP response.

**5.1. Provide Comparable References**

Respondent must have project references that demonstrate having successfully completed projects of similar size and scope in recent years, as evidenced in Appendix A - References. Note: References will be further evaluated for validity and respondent may be subject to disqualification if the minimum required references are later found to be invalid or non-responsive.

- 5.1.1. If respondent is bidding the ERP Assessment and Upgrade, must have demonstrated experience and successful completion of at least two (2) public sector Oracle EBS release 12.2.x upgrade projects, in the past 5 years
- 5.1.2. If respondent is bidding the Enterprise Reporting Tool Solution, must have demonstrated experience and successful completion of at least two (2) Oracle OBIEE projects, in the past 5 years

## 6. Agreement

- 6.1. GISD intends to begin negotiations for services based upon our standard contract template, provided as **Exhibit B – Upgrade Services Agreement**. A statement shall be included in the transmittal letter accepting the format/terms and conditions of the agreement or clearly state any exceptions/deviations taken on the Compliance Form.

## 7. Evaluation

Proposals will be evaluated by an evaluation committee consisting of GISD employees. The evaluation team will establish their independent evaluation results using a standard the scoring rubric below. Price proposals will be scored by the Purchasing Department using a pre-determined formula. Written and price proposals will be combined and ranked according to evaluation criteria. The top 3 ranked finalists will be asked to deliver oral presentations. Final evaluations and award will be based on combined points from the written proposal, price proposal, and oral presentation.

	<b>Evaluation Criteria:</b>	<b>Max Points</b>
1	<b>The purchase price</b> 4.9 Price Proposal	40
2	<b>The reputation of the vendor and of the vendor's goods or services</b> 4.2 Transmittal Letter 4.4.1 Proposer Business Information 4.4.2 Proposer Business Description	5
3	<b>The quality of the vendor's goods or services</b> 4.4.3 Experience and Other Qualifications 4.4.4 References - similar industry, size & scope 4.4.4 References - quality/scoring of references	20
4	<b>The extent to which the goods or services meet the district's needs</b> 4.5 Overview and Approach to Implementation 4.6 Additional Proposed Services or Products 4.7 Exceptions to RFP and Conflicts of Interest	20
5	<b>The vendor's past relationship with the district</b> 4.4.5 Past Relationship with District	3
6	<b>The impact on the ability of the district to comply with the laws and rules relating to historically under-utilized businesses (HUB)</b>	0
7	<b>The total long-term cost to the district to acquire the vendor's goods and services</b>	0

8	<b>For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner: A. has its principal place of business in this state B. employs at least 500 persons in this state</b>	0
9	<b>Ability to comply with requested RFP response format</b> 4.1 Proposal Format	2
10	<b>Oral Presentation</b>	10
	<b>Total Points</b>	<b>100</b>

## 8. Oral Presentation

Approximately 10 – 15 business days after written proposals are due (see Timetable section), the top 3 ranked finalists will be asked to deliver oral presentations to the GISD evaluation committee. Presentations will be onsite at GISD Harris Hill Administration Building. You will be provided 2 hours and are encouraged to present with your proposed implementation team. There is no prescribed format, however, you should allocate time wisely for presentation, questions, and discussion, since time will not be extended. GISD reserves the right to cancel presentations if it deems them unnecessary for award. All costs associated with presentations will be the vendor's responsibility.

## 9. Timetable

The following timeline is subject to change by the District.

Event	Date and Time
RFP Release Date	10/8/2020
Deadline for Questions from Vendor	10/20/2020 12:00 PM CST
Answers to Questions Posted via Addendum	10/26/2020 4:00 PM CST
Proposals Due	11/12/2020 10:30 AM CST
Thanksgiving Break	11/23/2020 – 11/27/2020
Finalists Notified	12/3/2020
Winter Break	12/21/2020 – 1/1/2021
Oral Presentations	1/6/2021
Letter of Intent to Award	2/5/2021
Board Finance & Audit Committee Meeting	2/9/2021
Board Meeting	2/23/2021
Anticipated Project Start	3/1/2021
Spring Break	3/15/2021 – 3/19/2021

**APPENDIX A – REFERENCES  
PROPOSAL #2-21  
ORACLE UPGRADE SERVICES**

Provide at least five (5) of the most similar contracts (per Scope of Work), preferably K-12 education, higher education, or other governmental agencies, or related engagements that respondent has completed within the past five (5) years. The contact information provided should be an individual that was directly involved and/or most familiar with the project. REFERENCES WILL BE CONTACTED AND SCORED.

1	<b>Client/Company Information</b>		<b>Contact Information</b>	
	<b>Client Name</b>		<b>Name</b>	
	<b>Contract Term/Period</b>		<b>Title</b>	
	<b>Est. Contract Value</b>		<b>Phone</b>	
	<b>Number of Employees</b>		<b>Email</b>	
	<b>Brief Project Description</b>			
2	<b>Client/Company Information</b>		<b>Contact Information</b>	
	<b>Client Name</b>		<b>Name</b>	
	<b>Contract Term/Period</b>		<b>Title</b>	
	<b>Est. Contract Value</b>		<b>Phone</b>	
	<b>Number of Employees</b>		<b>Email</b>	
	<b>Brief Project Description</b>			
3	<b>Client/Company Information</b>		<b>Contact Information</b>	
	<b>Client Name</b>		<b>Name</b>	
	<b>Contract Term/Period</b>		<b>Title</b>	
	<b>Est. Contract Value</b>		<b>Phone</b>	
	<b>Number of Employees</b>		<b>Email</b>	
	<b>Brief Project Description</b>			
4	<b>Client/Company Information</b>		<b>Contact Information</b>	
	<b>Client Name</b>		<b>Name</b>	
	<b>Contract Term/Period</b>		<b>Title</b>	
	<b>Est. Contract Value</b>		<b>Phone</b>	
	<b>Number of Employees</b>		<b>Email</b>	

	<b>Brief Project Description</b>	
<b>5</b>	<b>Client/Company Information</b>	<b>Contact Information</b>
	<b>Client Name</b>	<b>Name</b>
	<b>Contract Term/Period</b>	<b>Title</b>
	<b>Est. Contract Value</b>	<b>Phone</b>
	<b>Number of Employees</b>	<b>Email</b>
	<b>Brief Project Description</b>	

## APPENDIX B - PRICE PROPOSAL FORM

### PROPOSAL #2-21 ORACLE UPGRADE SERVICES

**Complete the Price Proposal Form for each identified scope of work and any additional proposed services or products.** At a minimum, price proposals shall reflect the items listed below, however, further itemization of fees is recommended. All fees submitted must be all-inclusive. Total pricing for each scope of work shall be on a not-to-exceed basis. Respondents must bid on all items listed or indicate no bid. Price shall remain fixed for the initial contract award year(s).

<b>ERP Assessment and Upgrade (Phase 1)</b>		<b>Price</b>
<b>Item #</b>	<b>Description</b>	
1	Assessment of current Oracle EBS r12.1.3 and recommendations for upgrade to Oracle EBS r12.2.x	\$
2	Upgrade of Oracle EBS 12.1.3 to r12.2.x	\$
3		\$
4		\$
	<b>Subtotal</b>	<b>\$</b>

  

<b>Enterprise Reporting Tool Solution Assessment, Upgrade and Deploy (Phase 1)</b>		<b>Price</b>
<b>Item #</b>	<b>Description</b>	
1	Assessment of current reporting solution, needs, and recommendations for replacement reporting solution on OBIEE	\$
2	Upgrade of OBIEE reporting platform and replacement of Oracle BI Discoverer reports on OBIEE reporting platform	\$
3		\$
4		\$
	<b>Subtotal</b>	<b>\$</b>

  

<b>Assess and Streamline Document Approval Flows (Phase 2)</b>		<b>Price</b>
<b>Item #</b>	<b>Description</b>	
1	Assessment of iProcurement document approval flows and recommendations utilizing Approvals Management Engine (AME)	\$
2	Streamline and deploy iProcurement document approval flows utilizing Approvals Management Engine (AME)	\$
3		\$
4		\$
	<b>Subtotal</b>	<b>\$</b>

  

<b>Additional Proposed Services or Products</b>		<b>Price</b>
<b>Item #</b>	<b>Description</b>	
1	Identify all fees for additional services and/or products not included in the requested scopes of work	\$
2		\$
3		\$
	<b>Subtotal</b>	<b>\$</b>
	<b>Total Not-to-Exceed</b>	<b>\$</b>

## APPENDIX C – SCHEDULE OF RATES FORM

## PROPOSAL #2-21 ORACLE UPGRADE SERVICES

Complete the Schedule of Rates Form for additional work outside of the scope of this engagement. The rate schedule shall include a rate for each position or role required for the initial engagement and/or continuation of services post-implementation. Respondents should include positions such as Project Manager, Functional Consultant, Technical Consultant, Solution Architect, DBA, and/or any other roles that are required to support the current and additional scopes of work. Pricing submitted must be all-inclusive of travel and other related expenses. Rates shall remain fixed for the initial contract award year(s).

## **APPENDIX D – REQUIRED FORMS**

### **PROPOSAL #2-21 ORACLE UPGRADE SERVICES**

Please complete and attach all required forms.

## EXHIBIT A – CHANGE ORDER REQUEST FORM

### PROPOSAL #2-21 ORACLE UPGRADE SERVICES



# Change Order Request

<Partner Logo>

The Change Order Request form is to be completed when changes in project scope have been identified, specifically as it relates to the Request for Proposal, Master Services Agreement, and/or Statements of Work. Upon creation, both Garland ISD and <Partner> should review and determine if the change order request will be approved.

<b>Contract Number/Name:</b>	RFP 2-21 Oracle Upgrade Services
<b>Project Name:</b>	Oracle EBS r12.2.x Upgrade and Services
<b>Project Manager (GISD):</b>	Jason Genovese
<b>Project Manager (&lt;Partner&gt;):</b>	
<b>Change Request Number:</b>	PCR-<nnnn>
<b>Request Date:</b>	
<b>Request Name:</b>	
<b>Priority:</b>	

#### ORIGINATOR

<b>Originator Name:</b>	
<b>Originator Title:</b>	

#### CHANGE REQUEST DETAILS

<b>Description of Change:</b>	
<b>Justification/Reason for Change:</b>	
<b>Risks:</b>	
<b>Estimated Cost Impact:</b>	
<b>Estimated Schedule Impact:</b>	
<b>Estimated Resource Impact:</b>	

# Change Order Request Signature Page

Details of the project change request have been discussed and agreed upon by both parties.

**Garland ISD**

**<Partner>**

<b>Signature:</b>		<b>Signature:</b>	
<b>Name:</b>		<b>Name:</b>	
<b>Title:</b>	<Project Manager/Sponsor>	<b>Title:</b>	<Project Manager/Sponsor>
<b>Date:</b>		<b>Date:</b>	

**EXHIBIT B – UPGRADE SERVICES AGREEMENT**

**PROPOSAL #2-21  
ORACLE UPGRADE SERVICES**

The Upgrade Services Agreement will be provided via Addendum, per Timetable section.

# Compliance Form

An authorized company representative must sign this form to indicate compliance with the Instruction Sheet, Instructions to Proposer, Award/Evaluation of Proposals, Certifications, Shipping and Delivery, Terms and Conditions and all other information contained in this solicitation. All **deviations** shall be listed on this page, with complete detailed conditions and information included or attached. The District will consider any deviations in its award decisions, and the District reserves the right to accept or reject any bid based upon any deviations indicated below or in any attachments or inclusions.

In the absence of any deviation entry on this form, the bidder assures the District of their full compliance with the Instruction Sheet, Instructions to Proposer, Award/Evaluation of Proposals, Certifications, Shipping and Delivery, Terms and Conditions and all other information contained in this solicitation.

Please list deviations below (attach additional sheets, if needed):

Company Name

## Address

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Printed Name \_\_\_\_\_ Title \_\_\_\_\_

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**Signature**

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Email Address

Telephone #  Fax #

## **FINGERPRINTING/CRIMINAL HISTORY CHECK**

**Suppliers who will only deliver but not enter a school building to perform services, will be required to complete and submit the CERTIFICATION FOR CRIMINAL HISTORY CHECK FORM only, prior to beginning services.**

Suppliers who will deliver and enter a school building to perform services, will be required to complete the Criminal History Check process described below, prior to beginning services, and return after all personnel have been fingerprinted.

### **Criminal History Checks**

During the term of this agreement, the firm's employees have the potential to have continuing duties and direct contact with students. Subsequently, the supplier is responsible for complying with Texas Education Code § 22.0834. Supplier may not commence work until all employees have been approved by the Purchasing Department.

At a minimum, the company recommended for award shall:

1. Obtain required criminal history record information, through the Department of Public Safety's Fingerprint-based Applicant Clearinghouse of Texas (FACT), regarding its employees assigned to work GISD premises. The following steps should be followed to complete the process:

If you are a **sole proprietor** (one-person company) you must:

- 1.1 Contact GISD Purchasing Department to obtain FAST pass.
- 1.2 Follow instructions on the FAST Pass to arrange an appointment for employees to be finger printed. Employers may select the most convenient location to their zip code.  
\*If there is not a convenient location based on your zip code, please enter 75042 and choose "Garland: Garland ISD" to schedule your fingerprint appointment. \*
- 1.3 After fingerprinting is completed, email Eva Gracia, Administrative Assistant to Director of Purchasing at [Egracia@garlandisd.net](mailto:Egracia@garlandisd.net) and provide the following: RFP number, full name and date of birth for all personnel assigned to work on site during the contract term. If it is not possible to verify an employee based on the name and date of birth, it may be necessary to provide a driver's license number or state identification card.

All other **suppliers, contractors and subcontractors** must:

- 1.4 Supplier will receive award letter or signed contract from the Purchasing Department.  
**Subcontractors will obtain an award letter or contract from the general contractor, before contacting DPS.**
- 1.5 Contact the Department of Public Safety (DPS) at (512) 424-2474, select option 2, to establish a vendor account and obtain a FAST pass. This process can take up to seven to ten business days.
- 1.6 Follow instructions on the FAST Pass to arrange an appointment for employees to be finger printed. Employers may select the most convenient location to their zip code.  
\*If there is not a convenient location based on your zip code, please enter 75042 and choose "Garland: Garland ISD" to schedule your fingerprint appointment. \*

2. After fingerprinting is completed, email Eva Gracia, Administrative Assistant to Director of Purchasing at [Egracia@garlandisd.net](mailto:Egracia@garlandisd.net) and provide the following: RFP number, full name and date of birth for all personnel assigned to work on site during the contract term. If it is not possible to verify an employee based on the name and date of birth, it may be necessary to provide a driver's license number or state identification card.

If an employee is arrested while under contract, you must contact Dana Knox, GISD Human Resource Specialist of Fingerprinting/Investigations at 972-487-3213. The incident must be reported within 3 business days of the arrest.

Notify GISD Purchasing Department if employees leave employment with the firm during the contract term or cease responsibilities on GISD property.

## **Certification for Criminal History Check (In Compliance With Texas Education Code § 22.0834(A))**

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***“Covered employee”*** - A “covered employee” is a person who is an employee, applicant, agent or Subcontractor of the Contractor or of any Subcontractor of the Contractor, if (a) the person has or will have work duties related to the Project that will be performed on District property or at another location on a regular or repeated basis, (b) students are regularly present at such location, and (c) the person will have verbal or physical interaction with, or be in direct proximity to, one or more students.

***“Direct contact with students”*** - The contact that results from activities that provide substantial opportunity for verbal or physical interaction with students that is not supervised by a certified educator or other professional district employee. Contact with students that results from services that do not provide substantial [the] opportunity for unsupervised interaction with a [an individual] student or students, such as addressing an assembly, officiating a sports contest, or judging an extracurricular event, is not, by itself, direct contact with students. However, direct contact with students does result from any activity that provides substantial [the] opportunity for unsupervised contact with students, which might include [such as], without limitation, the provision of [individualized] coaching, tutoring, or other services to students.

***“Disqualifying conviction”*** - A “disqualifying conviction” is a conviction of (a) any felony under the Texas Penal Code, (b) any offense for which the person is required to register as a sex offender under Chapter 62 of the Texas Code of Criminal Procedure, (c) any equivalent offense under the laws of the United States or any other state, (d) any offense against a child, (e) misdemeanor possession of a controlled substance within 10 years, (f) any weapon offense, (g) theft, larceny, fraud, issuance of a bad check, theft by check above the class C misdemeanor level, or more than one offense at the class C level, (h) forgery, (i) altering an Official Document, (j) perjury, or (k) securing executing of a document by deception.

**On behalf of \_\_\_\_\_ (“Contractor”), I certify that [check one]:**

- None of Contractor’s employees are *covered employees*, as defined above. The service contractor shall also certify that it will take reasonable steps to ensure that the conditions or precautions that have resulted in a determination that any person is not a covered contract employee continue to exist throughout the time that the contracted services are provided.

**Or**

- Some or all of Contractor’s employee are *covered employees*. If this box is selected, I further certify that:
- (1) **Contractor has obtained all required criminal history record information, through the Texas Department of Public Safety, regarding its covered employees. None of the covered employees has a disqualifying conviction.**
  - (2) **If Contractor receives information that a covered employee has a disqualifying conviction, Contractor will immediately remove the covered employee from contract duties and notify the District in writing within 3 business days that it has done so. Noncompliance by Contractor with this certification may be grounds for contract termination.**

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Signature

Title

Date

## Confidential Information Declaration & Copyright Authorization Form

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**The bidder must stamp in bold red letters the term "CONFIDENTIAL" or "PROPRIETARY" on every page of any part of a bid that the bidder claims is confidential or proprietary. Furnishing confidential or proprietary information is discouraged.** The District cannot guarantee that the District will be allowed to keep the information submitted confidential. The District may reject as non-conforming any bid that contains confidentiality claims that the District in its sole discretion considers vague or unreasonable.

All Invitations to Proposal and parts of bids that are not marked as confidential or proprietary will generally be considered public information once the contract is awarded. The District assumes no liability or responsibility for release of any information not properly marked. The District assumes no liability or responsibility for release of any information that is properly marked but is determined by the Texas Attorney General or a court of law to be subject to release. In the event that the District receives a request for disclosure of material marked "confidential" or "proprietary", the District may request a ruling from the Texas Attorney General concerning whether such material must be disclosed.

Proposals asserted to be copyright protected in their entirety are unacceptable and may, in the District's sole discretion, be disqualified as non-responsive. By submitting copyrighted materials as part of your bid, you hereby grant the District authorization to reproduce and provide copies of such information in response to a valid request for information under the Texas Public Information Act, Texas Government Code Chapter 552. By submitting copyrighted materials, you are representing that you have the authority to grant such authorization for the reproduction and release of such information. You further agree to waive any and all claims against the District regarding the release of such copyrighted information including, but not limited, to any claim of copyright infringement when released in response to a valid request for information under the Texas Public Information Act, Texas Government Code Chapter 552.

- Contents of this document are NOT considered Confidential or Proprietary
- Contents of this document ARE considered Confidential or Proprietary. Please identify the pages and/or sections declared Confidential or Proprietary by properly marking the pages &/or sections as confidential or proprietary and listing them below:  

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The undersigned affirms that the District assumes no liability/responsibility for the release of any information if this form is not properly completed, signed and the appropriate pages clearly marked as directed. The undersigned further grants authorization for the reproduction and release of any information asserted to be copyright protected in response to a request for information under the Texas Public Information Act, and waives any and all claims regarding the release of such information.

---

Printed Name

---

Signature

Title

Date

## **INSURANCE REQUIREMENTS**

The Vendor shall purchase and maintain, in a company or companies licensed to do business in the State of Texas. Such insurance as will protect the Vendor and the District from claims set forth below, which may arise out of, or result from, the operations under the contract. The Vendor shall be a subscriber to the Texas Workers' Compensation Act for Workers' Compensation Insurance. The vendor shall file with the Director of Purchasing, before work is begun, certificates of such insurance which shall be subject to approval by the District as to the company providing insurance and the manner and adequacy of insurance protection. The Vendor shall, during the performance of this Agreement, keep in force the following insurance:

- a. Comprehensive General Liability\*(CGL)
    - 1) Bodily Injury \$250,000 each person, \$500,000 each occurrence,  
\$1,000,000 aggregate
    - 2) Personal Injury \$250,000 each person, \$500,000 each occurrence,  
\$1,000,000 aggregate
    - 3) Property Damage \$500,000 each occurrence
  - b. Comprehensive Automobile Liability\*(CAL)
    - 1) Bodily Injury \$500,000 each person, \$500,000 each occurrence,  
\$1,000,000 aggregate
    - 2) Property \$100,000 each occurrence
  - c. Workers' Comp. (as a subscriber to the Act) Statutory (per benefits of Texas Workers' Comp. Act)
  - d. Employer's Liability
    - 1) Each accident \$300,000
    - 2) Disease \$300,000
    - 3) Disease for each employee \$300,000
- \*In the alternate, CGL and CAL insurance coverage a combined single limit policy of \$500,000 for both property damage and bodily injury may be provided with 1 million dollar aggregate. Vendors having unsupervised access to students must have a minimum of \$100,000 claim/\$300,000 aggregate coverage for sexual abuse and molestation endorsed to their General Liability.

The Vendor shall either: (1) require each of its sub-contractors to procure and to maintain during the life of the sub-contract, Sub-contractor's Workers' Compensation Insurance as a subscriber to the act, Comprehensive General Liability, Automobile Liability, and Property Damage Liability Insurance of the type and in the same amounts as specified above, or (2) insure the activity of its sub-contractors in its own policy(ies).

All such policies of insurance shall contain a provision that they shall not be cancelled or altered nor the amount of coverage reduced until at least thirty (30) days after notice of such cancellation, alteration, or reduction has been delivered to the District.

Such policies of insurance shall be written by companies authorized by the Texas Department of Insurance to conduct business in the state and shall be satisfactory to the District. Vendor shall not commence work under this Agreement until satisfactory evidence of such insurance has been delivered to, and approved by the District.

**Self-Insurance:** A vendor who self-insures for workers compensation must possess a Certificate of Authority to Self-insure issued by the Texas Workers Compensation Commission as a subscriber to the Workers' Compensation Act. By signing below, the bidder/prospective Vendor certifies that it possesses such certificate, and shall furnish a copy of the Certificate of Self Insurance with Bid Invitation.

**The Certificate of Insurance must be presented prior to start of service. The policy must reflect Garland I.S.D. as "additional insured" or "co-insured".** The amount of deductibles and self-insurance retention must be shown on Certificate of Insurance.

By initialing below, the bidder certifies that it is capable of providing the type(s) and coverage of insurance required. \_\_\_\_\_ (Initials)

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Company Name	Insured By:	Printed Name	Certificate Number
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