



# FORT BEND CENTRAL APPRAISAL DISTRICT

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2801 B.F. Terry Blvd. Rosenberg, Texas 77471-5600

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[www.fbcad.org](http://www.fbcad.org)

April 21, 2023

**REQUEST FOR PROPOSAL  
FINANCIAL, BUDGET, REVENUE, AND HUMAN RESOURCE MANAGEMENT ERP SOFTWARE  
SOLUTION**

Sealed responses are being accepted for the following:

Request for Proposal (RFP) for Fort Bend Central Appraisal District (FBCAD) from qualified firms to provide Financial and Human Resources ERP Solution. The RFP information is available on [FBCAD's website](#) and [Texas Smartbuy's website](#).

The deadline to submit the RFP to FBCAD is **Wednesday, May 31, 2023, before 2pm**. RFPs will be reviewed, and a recommendation will be made to the FBCAD's Board of Directors for consideration and possible action.

Please submit RFPs in a sealed envelope marked "DO NOT OPEN – RFP - FINANCIAL AND HUMAN RESOURCES ERP SOLUTION to Fort Bend Central Appraisal District, Attention: Finance Department, 2801 B. F. Terry Blvd., Rosenberg, Texas 77471.

FBCAD reserves the right to accept or reject any or all proposals and to waive any informalities in the bidding.



**REQUEST FOR PROPOSAL (RFP)**

**For**

**FINANCIAL, BUDGET, REVENUE, AND HUMAN RESOURCE MANAGEMENT ERP  
SOFTWARE SOLUTION**

Fort Bend Central Appraisal District  
2801 B. F. Terry Blvd.  
Rosenberg, Texas 77471  
(281) 344-8623  
[www.fbcad.org](http://www.fbcad.org)

Issued by Finance Department

**RFP Close Date: May 31, 2023, 2pm CST**

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## SOLICITATION SCHEDULE

Milestone	Date/Time
RFP Published to FBCAD Website & ESBD websites	April 25, 2023
Onsite or Virtual Software Demo	May 8 -10, 2023 Optional
Deadline for written questions/inquiries	May 9, 2023
Estimated Responses to written questions/inquiries	May 11, 2023
Proposal Submission Due Date	May 31, 2023, by 2pm CST
Anticipated BOD Approval	June 2023
Contract Negotiation and Execution by Chief Appraiser (anticipated date)	July 2023

FBCAD reserves the right to revise this schedule. Any such revision will be disclosed by the issuance of an addendum to the RFP posted on [www.fbcad.org](http://www.fbcad.org) and <https://www.txsmartbuy.com/esbd>.

## Introduction

The Fort Bend Central Appraisal District, hereinafter referred to as the “District” or “FBCAD”, is soliciting proposals pursuant to Chapter 252, Sec. 252.021 of the Local Government Code from qualified firms to provide Financial, Budget and Human Resources ERP Software and Implementation services. The purpose of this Request for Proposal (RFP) is to transition the District to an Enterprise Resource Planning (ERP) software system that will help automate and manage our core operational processes for optimal performance and efficiency. The single source provider will also deliver implementation, and training to FBCAD administration staff to cover the following processes: budgeting, financial reporting, forecasting, payroll, cash management, billing, accounts receivable, accounts payable, recruiting, onboarding, human resources management, employee self-service, and vendor management.

## General Information

FBCAD is a political subdivision of the State of Texas that was established in 1982 for the purpose of discovering and appraising property for ad valorem tax purposes for each local taxing unit within the boundaries of the District.

FBCAD presently employs approximately 148 team members. Fort Bend County covers an area of approximately 873 square miles and has approximately 376,000 property accounts to appraise yearly with a market value of an estimated \$107 billion.

Fort Bend County is experiencing continued growth and development which impacts our operations, resources and need to have adequate technology and tools for planning purposes.

The District is governed by a Board of Directors, legal, statutory, and administrative requirements of the Texas Property Tax Code and where applicable, the District also complies with the Government Code, Local Government Code, Occupations Code, and other bodies of law.

## Vendor Communication

Communication between the Administrative Department and vendors is encouraged and helpful however the following process must be observed to protect the integrity of the bidding process:

- All requests for clarifications, information, and questions must be submitted in writing during the Question-and-Answer timeline listed in the solicitation document. It shall be the responsibility of the Respondents to inquire about any portion of the RFP that is not fully understood or that is susceptible to more than one interpretation prior to the question period closing. All questions concerning the RFP must be submitted via email

only, to the administrator, Angela Randolph, at [angelarandolph@fbcad.org](mailto:angelarandolph@fbcad.org) and shall reference the page number, section heading, and paragraph, if applicable.

- All responses and necessary corrections to the solicitation will be communicated through the addendum process by the assigned administrator, Angela Randolph.
- Other than the assigned administrator listed, all communications regarding this solicitation are strictly banned and may result in disqualification.

The above referenced guidelines ensure the District is maintaining a fair and equitable opportunity among all eligible vendors during the solicitation process.

## Section I. PROJECT OVERVIEW AND SCOPE OF SERVICES

### 1) Project Overview

FBCAD is accepting sealed proposals from qualified respondents to provide financial, budget, revenue and human resource management software, implementation and training services from your organization while remaining in compliance with local, state and federal proposal laws and requirements. The District seeks to award a singular contract for this RFP.

### 2) Scope of Services

The intent of the RFP is to select a Financial, Budget, Revenue and Human Resource Management software solution to assist in the District's strategic goals and objectives and statutory budgetary and financial reporting requirements. The software solution should also help the District reduce manual processes around our financial and HR workflows and enhance the speed and depth of our analytical capabilities. One of FBCAD's goals is to gain real-time insight and data for strategic decision making and planning. The District aims to maximize the efficiency of our business processes and improve financial controls allocating the savings of resources to other high level critical and analytical work flows. The District strives to seamlessly adopt best practices around our annual budget process and financial reporting to our Board of Directors, taxpayers and stakeholders.

The proposer will provide all the materials, equipment, labor, insurance, supervision, tools, supplies and other expenses necessary to provide software and deliver implementation, training, and support of the ERP system.

It's the District's intent to find a user-friendly integrated software solution that offers the features, functionality and scalability to support the full installation and operation of the Administrative office's budget planning, financial reporting, human resource management and forecasting.

With a growing county, legislative changes, and reporting requirements, FBCAD seeks a provider of financial and human resource management software to replace our existing

systems and processes. Key capabilities of the provider and/or software solution should include, but are not limited to:

#### GENERAL

- a. An ERP solution that integrates our finances, payroll, human resources, purchasing, fixed assets, revenue streams and operations.
- b. Ability for the system to be maintained and run primarily by administrative/finance staff with minimal coding requirements, minimal IT intervention and support.
- c. Software support and implementation throughout the project and beyond.
- d. Online push of updates in test environment initially to minimize disruptions or loss of data.
- e. Modernize all processes that are occurring outside of the ERP.
- f. Integrates with other operational software for the District.
- g. Provide cloud-based backup solution software with unlimited users with levels of permissions.
- h. Strong provider of support and training for initial implementation and project mapping, ongoing technical support.
- i. Materials to train FBCAD users of the ERP solution.
- j. Disaster recovery capabilities for unexpected equipment failure, or inclement weather conditions.
- k. Cybersecurity threat detection monitoring of entire network to mitigate, eliminate, and/or preempt cyber-attacks.
- l. Experience with local, county, or special district governments.
- m. Performance metrics tracked and reported on project outcomes at various intervals.

#### FINANCIAL/REPORTING

- a. Generate standard financial statements, trial balance and general ledger reports, chart of accounts, budget reports, budget comparison and cash analysis reports.
- b. Export capability of reports (all) to Microsoft Excel, Word, Adobe PDF or Text.
- c. Provide real-time dashboards with performance metrics, budget comparisons, financial data, etc.
- d. Facilitate multi-year forecasting based on trends and/ or user defined assumptions.
- e. Ability to drill down easily through reports to source data.
- f. Integration of human resources position control module with the budget.
- g. Create Annual Budgets by department for planning and monitoring, reporting.
- h. Enable end-user visibility to budget status, expenditure activity and other user-defined dashboard metrics.
- i. Generate budget analysis graph and reports for each budgeted line item to compare encumbered and actual amounts against budgeted amounts for fiscal year.

- j. Facilitate collection and management of annual fiscal year budget requests for departments and operating expenses.
- k. Enhance the budget reporting and analytics capabilities for all budget participants.
- l. Integrate dashboards and financial data to facilitate Annual Comprehensive Financial Reports (ACFR) statements to stakeholders.
- m. Federal and state mandated tax reporting - F940, F941, W2, 1099 electronic quarterly and year-end reporting.
- n. 1099 processing with detailed reports including any back-up withholding.
- o. Generate detailed revenue reports by customer type (school district, city, county, special purpose, MUD etc.) via text and graphically.

#### CASH MANAGEMENT

- a. Cash Flow forecasting for bank accounts providing a budget vs. actual report.
- b. Automatic posting of routine banking transactions like bank transfers, interest income, payroll, benefits, taxes, with user defined GL coding eliminating the need to make manual journal entries in the general ledger.
- c. Automatic bank reconciliations tying to the general ledger accounts eliminating manual process outside the accounting system.
- d. Automatic bank feeds into the general ledger or import capabilities.
- e. Disbursement and check reconciliation functions from accounts payable and payroll.
- f. Import capabilities for outstanding journal entries into reconciliation module.

#### DISBURSEMENTS

- a. Streamline and integrate the accounts payable and purchase order process, approving invoices online reducing manual coding and printing.
- b. Manage vendor invoices, and vouchers, track open payables and prepare pre-check registers.
- c. Streamline, integrate and automate the payroll process with timesheet reporting, federal, state, retirement, health and other deductions and withholdings.
- d. Track capital assets purchases, expenditures and investments.
- e. Eliminate bottlenecks or silos with multi-level online approval capabilities of purchases/invoices.
- f. Contract management of vendors and the competitive bid process.
- g. Ability to view or add scanned document images supporting transactions.
- h. Automatically generate checks with authorization and approval levels with electronic check signing.
- i. Maintain vendors and expenditure history with integration to the budget.
- j. Purchase orders fulfillment capabilities in part or whole and available online.
- k. Ability to process EFT/ACH payments to vendors and Positive Pay Validation.
- l. Facilitate audit requests with receipt attachments to purchased items.
- m. Ability to pay multiple invoices with a single check.
- n. Provide multiple lines for general ledger and project allocations per invoice.

- o. Import invoice data from vendors or third-party systems.
- p. Purchasing Cards (P-cards) capability with defined users, with GL account coding and full history of purchases per card.

#### REVENUE/RECEIVABLES

- a. Automate and streamline routine processes like recurring invoicing.
- b. Improve the collection process with easier and convenient flexible payment options for our customers (taxing units) to pay billing invoices online including but not limited to- credit cards, debit cards, and eChecks.
- c. Post invoices to general ledger to track receivables and eliminate manual post of journal vouchers.
- d. Real-time payment processing that reflects updates to payer account balances immediately.
- e. Ability to generate and apply credits against invoices for taxing units that prepay or overpay amounts.
- f. Facility to post payments as deposits to general ledger.
- g. Detailed and real-time outstanding accounts receivable reports for cash flow management and forecasting.
- h. Ability to create one-off invoices for nonrecurring items including itemized charges with computed amounts.
- i. Store and manage our customer (taxing units) contact information from a central location with update capabilities.
- j. Streamline the billing process with auto capture of customer payments.
- k. Automatically compute and apply late payment penalties and interest as defined by user.
- l. Generate payment history reports and statements with current balances by customer.
- m. Ability to electronically transmit billing invoices within the ERP to recipients with read receipt, delivery confirmation.
- n. Generate aging, and open invoice report by customer.
- o. Process payments against invoices and ability to print or email customer payment receipts.

#### RECRUITING/TALENT MANAGEMENT

- a. Automate the HR onboarding process of new staff, payroll, benefits, retirement.
- b. Electronic document management reducing paper, overhead, and storage costs.
- c. Enhance talent recruitment, application processing and assessment.
- d. Efficiently and effectively maintain data for job applicants.
- e. Allow job applicants to sign up for pre-employment tests, orientation, and training via the ERP self-service.
- f. Use workflow to move job requisitions through the approval process.
- g. Make applications available to both employees and non-employees via the ERP self-service module.



- h. Allow applicants to enter personal information to ensure it is accurate and up to date securely and easily.
- i. Allow employees to self-report external training, view training for current position or for a job they are preparing for in the future.
- j. Allow a centralized HR group or individual departments to enter their own requisitions to describe open positions.
- k. Allow online applicants to attach an addendum, feature a résumé, copy of transcripts, etc.

#### HUMAN RESOURCES MANAGEMENT

- a. Integrates all employee data from hire to retire in one ERP system.
- b. Facilitate employee self-service to monitor, view, update and/or change their personal and employment data like withholdings, retirement, benefits, payroll, leave accruals, leave requests, performance evaluations etc. with auto updates to payroll with approval.
- c. Central location for all employee data – personal information, benefit elections, wages, promotions, performance evaluations, etc.
- d. Position control capabilities to include position number, unique identification number, name, employee class, certifications, education, training history, current salary, budgeted salary, actual salary expenditures, and other requirements associated with a position.
- e. Auto feed of employee updates or changes in ERP employee self-serve to payroll.
- f. Employee on-demand access to individual payroll records, W4 elections, pay history and paycheck calculator capabilities to show impact of changes to earnings, withholdings and deductions.
- g. Employee dashboard to view HR notifications, announcements, download forms, etc.
- h. Auto generate earnings and leave statements for employee retrieval.
- i. Ability to manage and process position related data such as salary, distribution, allocation, budget changes, salary savings/lapse, and/or position status.
- j. Automate open and new hire benefits enrollment to a paperless process allowing employees to access online portal for all insurance benefits.
- k. Maintain comprehensive employee records including addresses, dependents, emergency contacts, W-2, I9 information, training, licensing, education, medical information, pay scales, benefits, disciplinary actions, grievances and reviews.
- l. Manages accident and injury claims covered by worker's compensation including OSHA reportable events.
- m. Control viewing of Social Security (SS) numbers for unauthorized users, conceal SS numbers on inquiry screens and reports.
- n. Create multiple budget scenarios with position control budgeting features and automatically transfer personnel budgets to the budget module.

## EMPLOYEE EXPENSE REPORTING

- a. System that integrates with the general ledger, payroll and accounts payable and electronic process that eliminates paper expense reports with printed receipts.
- b. Ability to create online employee expense claim form template to include date, time, expense amount, description and other information.
- c. Capability to process employee expense reimbursement either through payroll or accounts payable modules.
- d. Document attachment capabilities for electronic receipts review and approval.
- e. Custom built process for workflow approval of expense reimbursements.
- f. Allow approver the ability to modify/edit expense reports prior to approval.
- g. Defined role-based security levels of permission to view, update, maintain expense codes, claim templates, employees, and claims, and convert to accounts payable or payroll.

## PAYROLL

- a. ERP system that supports our payroll function that reduces manual data entry ensuring all local, state, and federal requirements are met.
- b. Electronic time sheet entry that includes area for daily work log entries and integrates with Payroll.
- c. Supports accounting and reporting for deductions associated with all benefit and insurance plans.
- d. Ability to report FBCAD's liability for accrued benefits at fiscal year-end.
- e. Integration with Employee access providing paystubs, W-2, tax, benefit elections and accrual information.
- f. Generates detailed payroll reports, employee information, audit trails and retirement plans.
- g. Generates summary and detailed reports for leave history of all employees individually or by department.
- h. User-defined secure access to employee info, deductions, pay types and tables.
- i. Record and store every change to employee files with date/time and user ID using online employee audit trail records.
- j. Ability to process check types i.e., regular, payroll, direct deposit, vacation, void, deduction refund, manual and 1099 contractor payments.
- k. Facilitates Fair Labor Standards Act (FLSA) in overtime calculations with reconciliation.
- l. Utilize payroll calendars and work schedules for prescheduled time entry.
- m. Electronic filing of W-2, W-2C, and 1099s.
- n. Automated garnishment computations meeting federal requirements.
- o. Facilitate salary and benefit projections via integration of financial and HR modules to forecast all employee-related costs including raises, vacancies and benefits for up to 10 years into the future.
- p. Ability to process mid-cycle, annual raises, and process expense reimbursements.
- q. Prevent, detect check fraud and provide automatic check reconciliation.

- r. Automatically load time entry groups into batches with the ability to save and reload later. Payroll automatically advances date ranges of each entry record to match current payroll dates.
- s. Supports full-time equivalent (FTE) percentages and factors benefits and accruals based on FTE.
- t. Ability to run, expense and accrue payroll in one fiscal year with liquidation of expenses occurring in subsequent fiscal year.

## 5) Submission Deliverables

Please provide all the information requested as follows:

- i. Proposed Solution Summary – Describe how the company will address all the requirements of the system, including but not limited to:
  - a. Basic system design and operation – Provide a description of how the District, Administration and departments interact with the system to conduct:
    - i. Annual budgeting
    - ii. Multi-year planning
    - iii. Financial Processes and Reporting
    - iv. Human Resource Management
  - b. Estimate the District’s resources and skill level needed to maintain the system.
  - c. Provide how department users will interact with the system to access and use reports and/or dashboards.
- ii. Company Background – Background information should include but not be limited to:
  - i. Headquarters information (size, location, staff)
  - ii. Financial History and Disclosure
  - iii. Total Number and Percentage of Appraisal Districts
  - iv. Company Awards and Merits
  - v. Number of years in Public Sector Software
  - vi. List of Vendor products, software solutions
  - vii. Technology Evolution and Direction
- iii. Past Projects – Identify five (5) past projects within the past three years that are good example of proposed services on this RFP, for each provide a short case study that includes: 1) Scope of project, 2) Business processes that were improved, 3) Description of challenges faced, 4) Lessons Learned 5) Summary of client’s current situation.
- iv. Implementation – Describe the implementation process and support:
  - a. Provide a description of your implementation process, including a schedule for the project showing key phases, deliverables and milestones for the project.
  - b. List typical policy and procedure decisions needed by the District to complete implementation.

- c. List data feeds required from FBCAD systems and data conversion methods and processes.
    - d. Describe how you will staff the implementation using partners or internal resources.
- v. Architecture & Integration – Describe in as much detail as possible how the District’s data will flow through the application. Please also describe the key advantages of your technical application architecture.
- vi. Training – Describe training required for District staff (both finance and non-finance) in order to effectively administer, use, and support the system, including:
  - a. Training for project implementation team.
  - b. Initial or required training for system administrators and end-users.
  - c. Provide estimates of how long the learning curve is for various users to become acclimated with your product based on prior implementations for public sector clients.
- vii. Support and Maintenance – Provide a description of the nature and levels of support channels available during and after the implementation.
  - a. Options for telephone, email, and online support.
  - b. Response times for each channel listed above.
  - c. Support escalation path for unresolved or emergency issues.
  - d. Delivery method and frequency of future upgrades/product enhancements.
  - e. Describe any downtime during updates/upgrades, if any.
  - f. Services for adding data elements and corresponding reports.
  - g. Identify any fees or additional costs associated with support and maintenance.
- viii. Hardware Specifications – Describe the overall minimum requirements that will support the software’s optimal performance and usability of the system as follows:
  - a. Server Details
  - b. Operating Systems
  - c. Network Environment
  - d. Processor Information
  - e. Size of Memory
  - f. Hard Drive Arrays
  - g. Workstation Requirements (desktop, laptop, etc.)
  - h. Printer Compatibility
  - i. Provide all configuration options.
  - j. Who is responsible for hardware and system software maintenance?
  - k. If 3<sup>rd</sup> party vendor for hardware, and system, who is responsible for support?

- I. Recommendations for enhancements to improve overall performance.
- ix. License and Maintenance Agreements – Please append a sample license and maintenance agreement/contracts to the proposal for all components of the recommended solution.

Section II. SCHEDULE OF ITEMS AND PRICING

**Name of Bidder/Contractor** \_\_\_\_\_

**Instructions**

Please provide a financial proposal based on the Scope of Services outlined in this RFP. Proposer must complete this section in its entirety and may supplement this section with additional pages as to provide the District with a more detailed breakdown, backup and/or options of related costs associated with the services being solicited in this RFP. The total cost for the solution provided must be a turnkey cost inclusive of, but not limited to, travel and other ancillary expenses.

**Price Schedule**

- a. All costs must be itemized and included in the vendor's response. (e.g., license or service fees, fees for modification, training, installation, documentation, discounts etc.)
- b. The respondent is to provide information and pricing for all items listed in the Price Schedule to support the purchase of the requested product/service.
- c. Describe the pricing model (e.g., purchase of perpetual license and subscribe to ongoing maintenance, subscribe to a hosted service, fee rate based on number of users, etc.
- d. Clearly distinguish one-time costs and recurring costs and specify an estimate for the percentage annual increase in recurring costs.

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Base Bid Pricing		
Item Description	Costs	
	One-Time	Ongoing/Annual
Base price of system		
Implementation, including consulting, training, configuration assistance		
Post implementation training		
Post implementation support		
Additional modules/capabilities		

The proposal should detail all costs related to the services requested, as well as an estimate of any additional fees not listed that may accrue over the course of the contract.

**Additional Services**

In the event the District may require additional related services to be performed by the awarded Contractor that are outside the scope of the Agreement (“Additional Services”) it may submit a written request for a proposal from the Contractor (“Proposal”), which the Contractor may provide if the Contractor is willing and able to perform such Additional Services. Such Proposal shall contain (a) a scope of work to be performed; (b) a fixed billing rate for the proposed services; and (c) any other information relevant to such Proposal. The Contractor shall deliver such Proposal to the District within a reasonable timeframe. Upon approval, a purchase order will be issued to authorize the work. The District may deny such Proposal at its sole and absolute discretion.

**Value Added Services**

Respondents are to indicate any value-added services offered by an individual or firm for its services. These services include any skillset, abilities, or services(s) that may add overall value to a project that has not been previously requested in this document nor inherent in the delivery of said service(s). Please use this section to propose additional services related to the scope of work that are not specifically outlined in this RFP along with the standard price sheet.

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**Price Proposal Signature**

The information in this RFP is to be utilized solely for preparing the proposal response to this RFP and does not constitute a commitment by the District to procure any product or service in any volume.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**Section III. EVALUATION CRITERIA**

The Evaluation Committee (“Committee”) will review all proposals to determine which proposers have qualified for consideration according to the criteria stated herein. The Committee’s evaluations will be based on all available information, including qualification statements, subsequent interviews, if necessary, reports, discussions, reference checks and other appropriate checks. The highest rated proposer(s) evaluated by the Committee may be invited to make an oral presentation of their written proposal to the Committee. Upon review of all information provided by Respondents, the Committee will make a recommendation for selection to FBCAD officials. Upon approval of the selected Respondent, a contract shall be executed by the appropriate FBCAD officials after review and negotiation by legal counsel.

An evaluation committee will score proposals based on the following evaluation criteria:

<b>Evaluation Criteria</b>	<b>Available Points</b>
Firm’s Qualification and Experience, and Demonstrated Qualifications of Personnel and Team	30
Past Performance and Case Studies	20
Proposed Approach and Methodology	20
Price Proposal	20
Proposed Project/Performance Timeline	10
<b>TOTAL</b>	<b>100</b>

### **Eligibility for Award**

For the proposer to be eligible to be awarded the contract, the proposal must be responsive to the solicitation and the District must be able to determine that the proposer is responsible and has the resources and capacity to perform the resulting contract satisfactorily. Responsive proposals are those that comply with all material aspects of the solicitation, conform to the solicitation documents, and meet the requirements set forth in this solicitation. Proposals which do not comply with all the terms and conditions of this solicitation will be rejected as non-responsive.

- i. Responsible proposers, at a minimum, must meet the following requirements:
  - i. Have adequate financial resources, or the ability to obtain such resources as required during the performance of any resulting contract.
  - ii. Be able to comply with the required performance schedule, considering all existing business commitments.
  - iii. Have a satisfactory record of past performance.
  - iv. Have necessary personnel and management capability to perform any resulting contract.
  - v. Be qualified as an established firm regularly engaged in the type of business necessary to fulfill the contract requirements.
  - vi. Certify that the firm is not delinquent in any tax owed by the State of Texas under Chapter 171 and is not delinquent in any applicable Texas property taxes in your jurisdiction.
  - vii. Be otherwise qualified and eligible to receive an award under the applicable laws and regulations.
- ii. Proposer(s) may be requested to submit additional written evidence verifying that the firm meets the minimum requirements described above and, as necessary, to perform the requirements of the solicitation and be determined a responsible proposer. Failure to provide any requested additional information may result in the proposer being declared nonresponsive and the proposal being rejected.
- iii. Only individual firms or lawfully formed business organizations may apply. The District will contract only with the individual firm or formal organization that submits a response to this RFP.

### **Section IV. SUBMISSION INSTRUCTIONS**

- a) Labeled - Proposals must be clearly marked "FINANCIAL AND HUMAN RESOURCES ERP SOLUTION". Respondent's name and address must appear on the outside of the envelope.
- b) Deadline- Respondents are required to submit one (1) original, and three (3) hard copies of the proposed package no later than 2:00pm, Wednesday, May 31, 2023.
- c) No emails will be accepted for proposal submission.
- d) Electronic Media Proposal File: Respondents shall submit along with the hard copy proposals, one (1) electronic version of the Technical Proposal and one (1) electronic version of the Price Proposal on separate removable devices (e.g., thumb drive).



- e) Proposals should be directed to the attention of Angela Randolph, Director of Finance, and clearly labeled in a **sealed package**.
- f) Signatures - Respondent shall sign and date the Proposal. Proposals which are not signed and dated will be rejected. All proposals must be received at the designated location by the deadline shown. Proposals received after the deadline will not be considered for the award of the contract and shall be considered void and unacceptable.
- g) Additional Information - Specifications and related documents may be obtained from the Administrative Department at 2801 B. F. Terry Blvd., Rosenberg, Texas 77471, Monday through Friday 8 AM to 4:30 PM CST or from the Appraisal District's website at [www.fbcad.org](http://www.fbcad.org) and <https://www.txsmartbuy.com/esbd>.
- h) Technical Proposal - Your Technical Proposal should clearly define (i) your Firm's total capacity and capabilities, (ii) your qualifications to perform the work, (iii) your ability to perform the services outlined in the Scope of Services, (iv) your understanding of FBCAD, and (v) what differentiates you from the competition. At minimum, your Technical Proposal shall include the following:
  - i. Cover Letter – Shall not exceed 2 pages in length summarizing key points in the proposal with background information about your firm, including date of inception, legal form (sole proprietorship, partnership, corporation/state of incorporation), number and location of offices, headquarters/main office, total number of employees company wide, and in the State of Texas and principal lines of business. Certify that the firm is legally permitted or licensed to conduct business in the State of Texas for the services offered.
  - ii. Table of Contents – Immediately following the cover letter and introduction, include a complete table of contents for material included in the response documents.
  - iii. Qualifications and experience of the firm – Provide a brief description of your firm including the total number of supporting personnel related to providing the services of the type and kind required in this RFP. Provide the firm's overall ability in providing the service required in this solicitation and your understanding, knowledge, and experience of the solicitation requirements. Also provide a detailed list where your firm has provided services of the type and kind required in this RFP during the past five years including, but not limited to, public and private organizations including: counties, cities, school districts, and appraisal districts.
  - iv. Demonstrated Qualifications of Personnel and Team – Discuss the proposed designated staff of the responding firm (key personnel) committed to the District and providing the services described in this solicitation. Describe how the team will be organized to deliver the service. Provide brief resumes for each key personnel specifying the number of years' experience providing the type of service as described in this RFP. Also include the availability and commitment of respondent, its principal(s) and assigned professionals to undertake the services described in this RFP via a staffing schedule showing expected participation levels by month for all resources.
  - v. Proposed Approach and Methodology - Provide an approach and methodology overview which consists of a concise and detailed description of the requested services in this RFP. Identify the key metrics you propose to use to measure

- performance in delivering services of this type and kind in this RFP. Address how you measure and monitor quality of work, ensure delivery is met and how problems are tracked, escalated (if required) both internally and with the customer. Also, how you measure and monitor customer satisfaction; describe the method used, frequency and how results are reported.
- vi. Past Performance and Case Studies – Identify five past projects that are good examples of proposed services on this engagement within the past three years and for each provide a short case study that includes: 1) scope of project, 2) business processes that were improved, 3) description of challenges faced, 4) lessons learned, 5) summary of client’s current situation.
  - vii. Price Proposal – Include details of all costs related for the services requested, as well as an estimate of any additional fees not listed that may accrue over the course of the engagement.
  - viii. Project Timeline and Implementation Plan – Provide a detailed implementation plan with projected start and end dates of completion for each task, showing key phases, deliverables and milestones for the project. List any required FBCAD resources or expectations needed in order to meet the proposed deadlines.
  - ix. Firm’s Financial Status – Please provide audited financial statements and/or a statement from the president, owner or financial officer on company letterhead certifying that the company is in good financial standing and current in payment of all taxes and fees included but not limited to state franchise fees.
  - x. Certificate of Interested Parties - Pursuant to Texas Government Code 2252.908, the successful bidder must be able to provide the District with a printed, executed, and notarized original of a completed Certificate of Interested Parties form (Form 1295) with the signed contract. Failure to do so will result in the District’s inability to execute the contract. To complete the disclosure of interested parties form, or for further information, please visit the Texas Ethics Commission website at <https://www.ethics.state.tx.us>.
  - xi. All Required Attachments – Include all required attachments signed and notarized as indicated.

Section V. CONTRACT TYPE

The contract resulting from this RFP shall be in form and content satisfactory to the District and shall include, without limitation, the terms and conditions provided for in this RFP and such other terms and conditions as the District deems necessary and appropriate.

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Section VI. REQUIRED ATTACHMENTS

Proposers shall complete all noted Attachments and submit with Proposal. Attachments 1, 2, 3 and 4 must be signed and/or notarized.

Attachment No. 1	RFP Response Form
Attachment No. 2	Proposer's Certification
Attachment No. 3	Conflict of Interest Questionnaire Form (CIQ)
Attachment No. 4	Financial Interest Disclosure Statement
Attachment No. 5	Certificate of Interested Parties Form 1295
Attachment No. 6	Past Performance and Case Studies
Attachment No. 7	Financial Statements
Attachment No. 8	Personnel Reports and Resumes

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**RFP Response Form(s) for Fort Bend Central Appraisal District  
 RESPONSE TO ALL BLANKS AND REQUIRED DOCUMENTATION IS MANDATORY  
 Invitation to Provide Proposal for FINANCIAL, BUDGET, REVENUE, AND HUMAN RESOURCE  
 MANAGEMENT ERP SOFTWARE SOLUTION**

<b>Vendor Name</b>	
<b>Contact Person</b>	
<b>Address</b>	
<b>City, State, Zip</b>	
<b>FEIN</b>	
<b>Office Number</b>	
<b>Fax Number</b>	
<b>Email Address</b>	

**For: FINANCIAL, BUDGET, REVENUE, AND HUMAN RESOURCE MANAGEMENT ERP SOFTWARE SOLUTION**

Submit to: **Angela Randolph  
 Director of Finance  
 Fort Bend Central Appraisal District  
 2801 B. F. Terry Blvd.  
 Rosenberg, Texas 77471**

The undersigned hereby proposes to furnish all labor, materials, supervision and any other services necessary to complete the above referenced project for the bid amount(s) listed on the Schedule of Items and Prices. The undersigned certifies that the amount(s) contained in have been carefully checked and are submitted as correct and final.

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Typed Name: \_\_\_\_\_ Date: \_\_\_\_\_

SEAL: (If Corporation)