RESPONSE TO REQUEST FOR PROPOSAL #2025-017
ERP CONSULTANCY SERVICES

RESPONSE SUBMITTED TO

North Central Texas Council of Governments

TXShare
Your Public Sector Solutions Center

Attn: Craigan Johnson, Bid Contact
Phone: (817) 695-9186| Email: cjohnson@nctcog.org
Purchasing Division, 616 Six Flags Drive, Arlington,

SUBMISSION DEADLINE: FEBRUARY 26, 2025 (2:00 PM CST)

Company Details:	Point of Contact Details:
Resource Integrators, LLC 509 W 15th Street, Austin, TX 78701	Sridhar Patibandla, CEO 832.651.4843 | sri@resourceintegrators.com

Table of Contents

Tables:

Exhibits:

I. CERTIFICATE OF OFFEROR AND STATEMENT OF UNDERSTANDING

i. Certificate of Offeror

TXShare
Your Public Sector Solutions Center

REQUEST FOR PROPOSALS
For
Enterprise Resource Planning (ERP) Consultancy Services
RFP # 2025-017

Sealed proposals will be accepted until **2:00 PM CT, Monday, February 5, 2025** and then publicly opened and read aloud thereafter.

Resource Integrators, LLC
Legal Name of Proposing Firm

Sridhar Patibandla — CEO
Contact Person — Title

832-651-4843 — rfp@resourceintegrators.com | sri@resourceintegrators.com
Telephone Number — E-Mail Address

509 W 15th Street — Austin, Texas — 78701
Street Address of Principal Place of Business — City/State — Zip

509 W 15th Street — Austin, Texas — 78701
Complete Mailing Address — City/State — Zip

Acknowledgment of Addenda: #1 ✓ #2 ✓ #3 ____ #4 ____ #5 ____

By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore, that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Sridhar P.
Authorized Signature

Exhibit 1 – Signed Cover Sheet

ii. Statement of Understanding

Resource Integrators, LLC ("RI"), an Austin, TX based IT Solutions and Services Company, is delighted to submit our proposal to provide Enterprise Resource Planning (ERP) Consulting Services to the NCTCOG TXShare Program. RI has experience in serving its clients through similar cooperative programs. For example, we currently hold Texas DIR ITSAC and DBITS contracts.

We have read this RFP in detail and acknowledge our understanding of the wide range of ERP consultancy services (across six major categories) that can be provided as part of the TXShare Cooperative Purchasing Program to eligible organizations. These entities could be any public entity or non-profit, nationwide, that uses the TXShare contract.

Here is a brief description of the service categories and the associated tasks and deliverables:

- **Category 1:** Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure with an objective to extend their life span and enhance functionality.
- **Category 2:** Provide ERP Consultancy Services to assist NCTCOG or TXShare Entity's with research and preparation for ERP implementation. Here our services in the form of ERP research, vendor selection and strategic guidance will be used to set the foundation for a successful ERP implementation.
- **Category 3:** Provide ERP Consultancy Services to implement or replace an ERP system for NCTCOG or TXShare Entities. We will provide end-to-end ERP implementation services from project kick-off, planning to post-production support. Data migration, integration and user training will be critical components of the scope.
- **Category 4:** Provide Standalone Review and Documentation Services of TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation. Our business analysts and functional consultants will review/assess the existing system and processes and provide their recommendations for improvements. We can also provide a strategic roadmap that will define the short term and long-term goals.
- **Category 5:** Provide ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa for the NCTCOG or TXShare Entities. Our services will be utilized to upgrade a current ERP system to a newer version or replacing an on-premises ERP solution with a cloud-based ERP for improved efficiencies. Achieving seamless integration with various third-party applications and data sources and data conversion/migration services will be a critical part of the cloud migration scope.
- **Category 6:** Provide ERP Consultancy Services otherwise not anticipated in this RFP. We are going to provide standalone ERP consulting services on need basis.

Through this proposal, RI is demonstrating its capabilities for all six (6) categories specified above.

II. KEY PERSONNEL

RI's contract for ERP consultancy services under the NCTCOG TXShare Program will be managed by our leadership team members who come with years of experience working in the public sector and in the ERP domain.

i. Proposed Key Personnel #1

Sridhar Patibandla, CEO Program Director
Professional Experience Summary: Sridhar started his professional **journey in 2000 with ERP**. His key engagements include Pivotal **ERP implementations, upgrades and hosting**, and offering cutting-edge services to several prestigious clients – from public sector as well as commercial entities. In 2008, his journey took a new turn when he forayed into entrepreneurship in the IT industry. His undeterred efforts and investment in right teams has helped take many of his businesses to global level. He believes perfect vision and right team can help an organization grow big. His strategy begins from the ground-level. His vision for RI is to take it to new heights where it continuously maintains a huge pool of vetted competent resources across skillset and technologies. Picking up the industry competent candidates and training them so that they give utmost importance to clients has always been his priority. RI is a client-oriented company where the emphasis will be on meeting the expectations and deadlines of clients without compromising on the quality. Currently, he is also managing **RI's Texas DIR contracts – ITSAC and DBITS.**
Education and Certifications: ▪ Masters in Computer Applications from Nagarjuna University, India
Relevant Skills: ▪ ERP Program Management ▪ Customer success liaison ▪ Strategy building ▪ Partner network management ▪ Contract performance tracking ▪ Problem solving ▪ Team building
Representative list of clients managed/worked for: ▪ State of Texas ▪ MD Anderson ▪ UTMB ▪ Harris County ▪ Texas Health and Human Services Commission ▪ Teacher Retirement System of Texas ▪ State of California ▪ Lonestar College ▪ EP Energy ▪ Spectra Energy ▪ Tide Water

Table 1: Proposed Key Personnel #1

ii. Proposed Key Personnel #2

Nikhil Munagala Contract Manager I
Professional Experience Summary: Nikhil is a dedicated Contract Manager with over **nine (9) years of relevant experience**, including the last three (3) years as a Senior Account Manager at Resource Integrators. He has proven expertise in **client relationship management, project coordination, and compliance with cooperative contracts** and programs. Currently, he is serving as the primary point of contact between Resource Integrators and **Texas DIR**. He comes with hands-on experience in collaborating with public sector agencies, for instance, Texas CPA, TTSTC, HHSC, and CPA TREASURY for project requirements, candidate screening, and meticulous documentation preparation in the Texas DIR format. Several key highlights of his professional experience are listed below: ▪ Strong track record in managing three-year renewals with Texas agencies, collecting Purchase Orders (POs), & facilitating seamless communication between TX agencies & the RI team ▪ Trusted and respected by both clients and colleagues for fostering positive relationships and ensuring successful project outcomes ▪ Collaborate closely with internal teams to ensure client expectations are met and projects are delivered on time and within budget ▪ Managed a portfolio of key client accounts, fostering strong client relationships and delivering exceptional customer service ▪ Conducted regular meetings with clients to identify their evolving needs and provide tailored solutions ▪ Developed and executed strategic account plans to maximize client satisfaction and revenue growth ▪ Prepared and presented account performance reports to clients, highlighting achievements and future opportunities ▪ Assigned staffing/project requirements to appropriate teams within Resource Integrators, ensuring optimal resource utilization ▪ Conducted thorough candidate screening to match project/staffing requirements with the skills and qualifications of potential candidates
Education and Certifications: ▪ Masters in Computer Science, Lawrence Technological University, Michigan ▪ Bachelor’s in Computer Science, Jawaharlal Nehru Technological University
Relevant Skills: ▪ Contract management and renewals ▪ Client relationship management ▪ Account performance evaluation and analysis ▪ Technical screening of prospective candidates ▪ Conducting meetings with stakeholders ▪ Project coordination ▪ Risk assessment and issue resolution
Representative list of clients managed/worked for: ▪ Texas CPA (Comptroller of Public Accounts) ▪ Texas Health and Human Services Commission (HHSC) ▪ Texas Department of Housing and Community Affairs ▪ Teacher Retirement System of Texas ▪ Texas Treasury Safekeeping Trust Co ▪ Entergy Corporation

Table 2: Proposed Key Personnel #2

iii. Proposed Key Personnel #3

Aditya Ahuja Contract Manager II
Professional Experience Summary: Adi is a highly accomplished **IT delivery professional with a proven track record** of exceeding customer expectations through a consultative, solutions-driven approach. He has extensive experience in IT recruitment, software delivery, and managing high-value accounts across diverse industries, including **regional municipalities, technology, healthcare, and finance**. Throughout his career, Adi has successfully led and delivered **critical staffing and software implementation projects** for global clients such as Airbus, Stellantis, American Express, Sanofi, Microsoft, and the Ministry of Health. He has played a pivotal role in recruitment and project delivery, ensuring that client needs are met precisely and efficiently. Adi also spearheaded the contingent workforce teams at Randstad and Alten, successfully aligning recruitment and operational strategies to business goals. With expertise in software implementation, IT infrastructure, and project business operations, Adi delivers tailored solutions that drive growth and operational excellence.
Education and Certifications: ▪ Post Graduate Program in Business Analysis and Health Informatics, George Brown College, Canada, 2024-2025 ▪ Executive Education - Schulich School of Business, York University, Canada 2018 ▪ MBA - Foreign Trade and International Business - Indian Institute of Foreign Trade, 2011 ▪ BA/ BBA - Foreign Trade and Business Management - Indian Institute of Foreign Trade, 2009 ▪ Certified Scrum Master
Relevant Skills: ▪ Contract management and renewals ▪ Client relationship management ▪ Account performance evaluation and analysis ▪ Technical screening of prospective candidates ▪ Conducting meetings with stakeholders ▪ Project coordination ▪ Risk assessment and issue resolution
Representative list of clients managed/worked for: ▪ Oral Roberts University ▪ Oakland County ▪ City of San Diego ▪ Texas Treasury Safekeeping Trust Co. ▪ Entergy Corporation ▪ Ford ▪ Stellantis ▪ Major Banks in Canada including TD Bank, RBC

Table 3: Proposed Key Personnel #3

iv. Proposed Key Personnel #4

Jayan Ravindranathan Delivery Head
Professional Experience Summary: Jayan comes with over **18 years of experience** in managing and implementing ERP software Applications like PeopleSoft, Oracle Cloud, Workday and other Enterprise applications. His key areas of expertise include but not limited to Project Management, Program Management, Business Analytics and Reporting, Middleware /Integration Services, Change & Transition management, translating project ideas or Strategies into smart business outcomes, and enhancing Client Relationship. He has shown exemplary leadership in critical **Oracle cloud, PeopleSoft application(s)** and custom web and mobile application development projects for clients public sector, Higher-Ed, and commercial entities. He has been responsible to plan, organize, prioritize, and manage multiple Oracle Cloud application projects, ranging from **Implementations, Upgrades, Application Support and Enhancements** as well as **Integration services** on SOA platform and Oracle Integration Cloud. He has also provided PeopleSoft application/technical architecture and project management subject matter expertise for successful project implementations of **PeopleSoft Campus Solutions, HCM, FSCM and CRM projects** across a wide clientele. Relationship management with clients and partners is one of his primary forte. For several of our prominent engagements, Jayan has assumed the responsibility of conducting monthly and quarterly business reviews with key client stakeholders to measure client satisfaction; paying periodic client visits to help grow and receive feedback from major stakeholders; serving as escalations point of contact for client services; and reviewing contracts, statement of works, and any other agreements related to clients and ensure required documents are in place to perform services.
Education and Certifications: ▪ Bachelor of Engineering specialized in Electronics & Communication Engineering, 2006 ▪ Oracle GHRC 2019 Sales Specialist; Oracle HCM Cloud 2019 Sales Specialist ▪ People Tools 8.44 Application Developer-I Certified; People Tools 8.50 Aware Accreditation
Relevant Skills: ▪ Oracle ERP subject matter expertise ▪ Program management ▪ Building project timelines & provide effort-based cost estimations ▪ project planning and directing controls ▪ risk and resolution management ▪ Relationship management with clients and partners
Representative list of clients managed/worked for: ▪ Washington State Board for Community and Technical Colleges ▪ City of Santa Clara ▪ County of San Joaquin ▪ City of Boston ▪ The Ohio State University ▪ Stanford University ▪ Aims Community College ▪ Pima Community College ▪ University of Philippines ▪ The Hong Kong University of Science and Technology ▪ Amazon Inc. ▪ Expedia Inc. ▪ Entergy Corporation

Table 4: Proposed Key Personnel #4

v. Proposed Key Personnel #5

Ivan Mazoch **ERP Public Sector SME / Enterprise Architect**

Professional Experience Summary:
▪ Has served the following Texas state agencies throughout his career:
  ○ Comptroller of Public Accounts
  ○ Department of Health
  ○ Health and Human Services Commission
▪ 25+ years of system management, project management, and SDLC experience
▪ 25+ years of experience working with PeopleSoft ERP and State of Texas Applications
▪ 25+ years of multiple platforms experience
▪ 25+ years of managing technical and project staff
▪ 25+ years of writing and responding to Request for Offers (RFO) for State and Local Government
▪ Performed or oversaw every major PeopleSoft or platform upgrade for CPA for the last 25-plus years.
▪ Currently serving as a contract technical lead for the implementation of the Centralized Accounting and Payroll Personal System (CAPPS) for PeopleSoft Financials (FIN), Human Capital Management (HCM), and Enterprise Learning Management (ELM) environments, which includes implementing over 90 state agencies successfully since 2015.

Education and Certifications: ▪ BA, Management Information Systems, Baylor University, 1995 ▪ Completed professional training in the following: ○ Application Engine, PeopleCode, PeopleTools, PeopleTools I, PeopleTools II, Application Designer, Data Management Tools, Oracle Database Administration, Various EDS Management Classes, ACS Project Management Workshop classes, CPA Policy Training, CMM Key Process Area Training (Requirements Management, Software Project Planning, Software Project Tracking and Oversight, Software Quality Assurance), Software Development Life Cycle, Software Project Management Plan, Software Quality Assurance Plan
Relevant Skills: ▪ **Platforms:** Oracle Cloud Infrastructure, AIX, Sun Solaris, Linux, Oracle Linux, Windows Server, Windows, Apple iOS, Lotus Notes ▪ **Databases:** Oracle, Sybase, SQL Server ▪ **Language:** PeopleCode, COBOL, SQR, UNIX Korn Shell, HTML, C ▪ **Tools:** Crystal, Application Engine, TOAD, UNIX Emulators, WinSCP, Nvision, XML Publisher, SnagIt, STAT, Phire, UltraEdit, Ultracompare, Microsoft Word, Microsoft PowerPoint, Microsoft Excel, Microsoft Access, Microsoft Visio, Microsoft Projects, Business Objects, PeopleTools 6.x to 8.59.x, PeopleSoft User Productivity Kit, WebLogic, Tuxedo, Kibana, PeopleSoft Update Manager, Appsian ▪ **ERP Applications and modules:** PeopleSoft 6.0 to 9.2.x Financials, PeopleSoft 9.0 and 9.2 HCM, PeopleSoft ELM 9.1 to 9.2, Oracle Taleo Recruit, Oracle Taleo Learn, Oracle Identity Manager, ▪ **Other applications:** USAS, USPS, TINS, Treasury, SPA, Texas Smart Buy, ForgeRock, ServiceNow, Jira
Representative list of clients managed/worked for: ▪ State pf Texas - Comptroller of Public Accounts ▪ Texas Department of Health ▪ Health and Human Services Commission ▪ Electronic Data Systems, Austin, TX

Table 5: Proposed Key Personnel #5

vi. Proposed Key Personnel #6

James P Wardle ERP Public Sector Advisor / Enterprise Architect
Professional Experience Summary: J.P. is a senior Human Resources/Payroll and Financials consultant with over thirty (30) years of experience in the public sector, over eighteen years with the PeopleSoft application and over thirteen with the CAPPS application. He is experienced in full-cycle implementations, upgrades and production support. His expertise is in technical, project management and oversight. J.P. is a solutions-oriented leader that quickly solves problems while staying focused on the 'critical path' for project success as well as addressing the customer's needs. ▪ Responsible for providing management, technical oversight and detailed project reviews for the CAPPS Technology Operations Team. ▪ Experience reporting to executive leadership, steering committees and stakeholders. ▪ PeopleSoft version 9.2 as CAPPS Technology Operations Manager at CPA ▪ Over 18 years of experience with PeopleSoft including versions 7.52 through 9.2. ▪ Over 18 years PeopleSoft experience within Texas State Government. ▪ Over 26 years of experience with statewide systems in Texas State Government. ▪ Over 30 years of experience supporting multi agency HR/Payroll systems within Texas State Government ▪ Experience with As-Is, To-Be, Fit/Gap Analysis, System and Parallel Testing, Go-Live and Production Support, Technical Specifications, Conversion/Data Mapping. ▪ Experience in all aspects of the SDLC. He is currently serving as the Manager of the CAPPS Technology Operations team that consists of senior technical contractors, which is the oversight group for the implementation of the Centralized Accounting and Payroll\Personnel System (CAPPS) for PeopleSoft Financials (FIN), Human Capital Management (HCM) and Enterprise Learning Management (ELM) environments. Provided coordination and oversight with 3rd party vendors for data center build-out in Oracle Cloud Infrastructure in 7 months, which consisted of moving over 120 environments and still performing a PeopleSoft upgrade along with providing daily production support.
Education and Certifications: ▪ Civil Engineering, University of Texas, Austin
Relevant Skills: ▪ **Applications:** ○ Oracle/PeopleSoft Financials (GL / PO / AP / AR / INV / AM / eProcurement), Oracle/PeopleSoft EPM, Oracle/PeopleSoft Enterprise Portal, Oracle/PeopleSoft HCM (HR / Payroll / Benefits / TAM / Leave Accounting), Oracle/PeopleSoft ELM, KPMG RSTARS Financials, Dun & Bradstreet(Infor Global) HR/Payroll ▪ **Databases / Languages:** ○ Oracle, Sybase, UDB/DB2, VSAM, MS Access, Lotus Notes, Dbase III, SQL, VB, XML, COBOL, CICS, SAS, Fortran, Model204, Millennium, Crystal Reports
Representative list of clients managed/worked for: ▪ State pf Texas - Comptroller of Public Accounts ▪ Texas Legislative Council (TLC)

Table 6: Proposed Key Personnel #6

III. REFERENCES

Reference #	Client and Project Details
Reference #1	**Client Name:** Comptroller of Public Accounts (CPA), the State of Texas **Project Details:** Comptroller of Public Accounts for the State of Texas runs **PeopleSoft HCM (Human Capital Management), FSCM (Financial and Supply Chain Management), and ELM (Enterprise Learning Management)** for Texas agencies. That includes 113 agencies (by FY2021), over $90 billion in spending and onboarding of approximately 115,000 employees. Resource Integrators has been serving as one of CPA's **PeopleSoft ERP consulting services vendors since 2016**. RI has a direct contract with the State of Texas CPA through DIR (Texas Department of Information Resources). Our consultants have been involved to perform the following tasks: ▪ Support the implementation of PeopleSoft HCM v9.2 and FSCM v9.2 applications ▪ Assist in PUM Images and provide Managed Services for PeopleSoft HCM, FSCM applications ▪ Assist with fit-gap analysis, Retrofitting, Customizations and Data Conversions ▪ Replace custom objects / bolt-on with new delivered features with minimal customizations ▪ Provide documentation and training (upon request) We have around 35-40 resources (on an average) working at Texas CPA at any given point in time. **Point of Contact Details:** Sudheer Kovi, Project Manager Sudheer.Kovi@cpa.texas.gov (269) 779-5880
Reference #2	**Client Name:** Texas Treasury Safekeeping Trust Company (TTSTC) **Project Details:** RI was engaged to provide **ERP support services** for the Texas Treasury system, which is based on PeopleSoft, but also includes web-based application subsystems. This system processes all of the State's warrants, which can be over a billion dollars in a single processing run. Our team included project managers, developers, system administrators, database administrators and functional support consultants who were involved in system enhancements and business processes improvements. Unclaimed Property & SimCorp Dimension: Our Business Analysts assisted in processing transactions for unclaimed property claims, recommending business process improvements, and assisting with implementing system enhancements in support of strategic initiatives. While RI had been providing this support for many years through different contract vehicles, these services were re-awarded in FY21 through the DIR contract and were optioned for until August 2024.

	Point of Contact Details: Ted Iglehart, Director of Information Technology ted.iglehart@ttstc.texas.gov
Reference #3	**Client Name:** Texas Health and Human Services Commission (HHSC) **Project Details:** Since June 2015, RI has been providing ERP consulting services to HHSC. Our resources have led large projects in project management roles and a wide range of functions around ERP, including Security, Finance, and Strategy. For instance, RI was involved in the implementation of PeopleSoft recruitment module (TAM) and learning module for HHSC. **Point of Contact Details:** Anthony Hoyle, Program Manager, Information Technology Applications Anthony.Hoyle@hhs.texas.gov
Reference #4	**Client Name:** Teacher Retirement System of Texas (TRS) **Project Details:** This is a new account. On February 2023, RI was engaged by TRS to provide IT staff including ERP resources for various functions. **Point of Contact Details:** Kristi Vorce, Investments Budget & Accounting kristi.vorce@trs.texas.gov

Table 7: Client References

IV. PROJECT-RELATED EXPERIENCE AND QUALIFICATIONS

i. Company Background and Qualifications

Resource Integrators, LLC ("RI") has been successfully providing experienced IT resources and consultants to clients pursuing IT initiatives across various technologies since its incorporation in 2002. We are a certified Texas HUB.

We are **Austin-based** and our largest clients are Texas State Agencies. For more than **twenty (20) years**, we have been successfully providing information technology (IT) services to the State of Texas. RI has a long-running partnership with most of its clients. RI currently holds both **DIR ITSAC and DBITS contracts**. We have been providing consulting services for various short-term to long term engagements / projects involving ERP and other software system implementation, integration with various third-party applications, application maintenance and support, and user training.

Whether it's ERP, Database/System Administration, Big Data, Mobile Technology, Managed Services or Web technologies, we provide professional consultancy services for all. RI has significant experience in the following areas:

- Enterprise Resource Planning (ERP), including Texas CAPPS
- Custom system/functionality development
- Business Analysis, specifically as it relates to public sector
- System Development and Administration
- Procurement management
- Database Administration
- Oversight and Quality Assurance
- System Architecture Design and Deployment
- Strategic and executive-level project management
- Web-based technologies, including end-user portal development
- Web-based application development and support
- Mobile technologies

Our history and public-sector experience:

- Since 2002, RI has performed over **$80 million in similar services** to Texas organizations (primarily public-sector entities).
- We strongly believe we have been a trusted, reliable and "low maintenance" vendor for the State of Texas since 2002.
- We specialize in Texas government (almost exclusively) and currently provide services in the areas of Finance, Program & Project Management, Strategy and Security to other State and local governments.
- We have held **DIR contracts since 2006 with total sales over $35 Million** till date.
- We have also been instrumental in the success of many of the State's enterprise system deployments, some of which have been through our ITSAC contract and

others through other contract vehicles. For example, our team members have directly implemented and/or been involved in supporting nearly **every large-scale Enterprise Resource Planning (ERP) Financial and Human Resource application in Texas State government since 2002.**

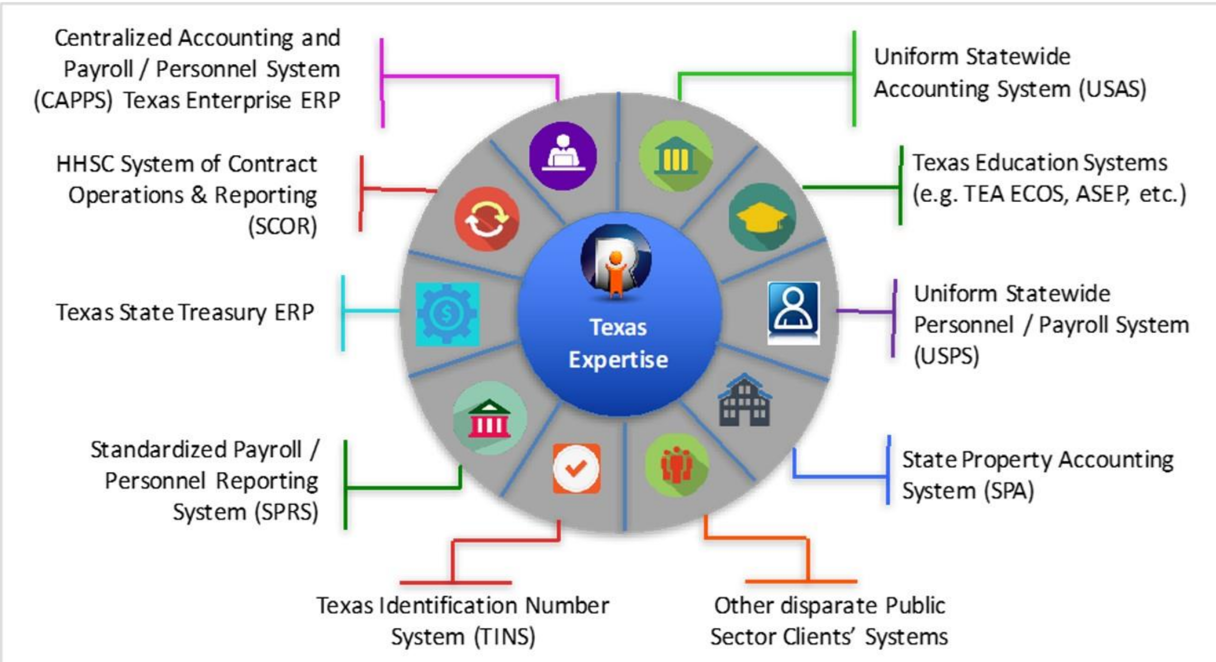

Exhibit 2: Texas Public Sector Experience

- A number of Texas state government agencies engaged RI to provide them with full-scale managed services, Microsoft Application Support and Development services, and a significant number of **ERP/CAPPS implementation and support** roles.
- RI has also been providing application **maintenance and support services for the Texas Treasury system** for past many years. Our consulting team for this engagement includes project managers, developers, system administrators, database administrators and functional subject matter experts.

<u>Some prominent success stories in ERP Consultancy Services:</u>

- One success story that we would like to highlight is RI's long-term relationship with the **State of Texas - Comptroller of Public Accounts (CPA).** RI has been successfully providing IT consulting services to the State of Texas CPA for the last ten (10) years. We have around 35-40 resources (on an average) placed at Texas CPA at any given point in time.

  In late 2015 and early 2016, we were awarded two distinct contracts with the Texas CPA for system development and **maintenance of ERP applications**. One contract is with the Fiscal Management Division to **provide ERP functional support** to include project managers, project leads, business analysts, technical writers, change management personnel, trainers, etc. Since this award, RI continues to provide a significant number of resources to the **Statewide Agency CAPPS deployment** and system support projects.

- We have been providing ERP Program and Project Management services for **Texas Health and Human Services Commission (HHSC)** transformation initiative over the last several years. Our services supported their large ERP initiative and contributed to a major transformation project.
- Another engagement is for the application development and support of the **Texas Treasury system**, which is based on **PeopleSoft ERP**, but also includes web-based application subsystems. This system processes all of the State's warrants, which can be over a billion dollars in a single processing run. Through this contract, RI provides the majority/most of the support, including project managers, developers, system administrators, database administrators and functional support. While we had been providing this support for many years through different contract vehicles, these services were re-awarded in FY21 through the DIR ITSAC contract and are optioned for several more years.

ii. Proposed Subcontractors and Third-Party Services

RI has been working with several subcontractors and partners while providing IT consulting services to various public sector entities across Texas. We will leverage some of these subcontractors for this engagement too in order to widen our geographical scope of providing the required services.

- **ERP Analysts (ERPA):** ERPA is a Dublin Ohio based client-centered Technology services firm, modernizing and maximizing their clients' investment in enterprise applications such as **PeopleSoft, Workday**, and cloud platforms such as Amazon Web Services.
- **MiniSoft Technologies:** A Houston, TX based IT company, MiniSoft provides business fit solutions built on SAP Platform and **SAP applications**. On the SAP services side, it focuses on SAP's new dimension products including S4HANA, SAP CRM, SAP NetWeaver, SAP Business Objects, and SAP Cloud Platform.
- **OMV America:** OMV America is a leading Information Technology Services and Business/Knowledge Process Services provider, delivering custom world-class services, which are business driven, competitive and provide business value. Established primarily as a technology consultant and systems integration, OMV America soon began offering a new breed of **business integration solutions** to clients'- solutions that aligned organizations' technologies, processes and people with their strategies.
- **Kgate Technologies Inc.:** Kgate is a Houston, TX based management consulting company offering IT staffing, recruiting and technological services in the areas of ERP consulting, Salesforce CRM, Big Data and Cloud.

In the event, we need to add more subcontractors during the course of this contract, we will seek NCTCOG's approval for the same.

iii. Organization Chart

RI's style of service delivery is always customer centric and tailored to our client's specific needs and direction. Our team members are professional and work with a strong work ethic to ensure any strategy initiative is performed at or above client's expectations and to align with their business objectives and priorities. At RI, we have an organization-wide commitment - from top management level to contract management level - to support our contracts and customers.

Below is the high-level organization chart to support NCTCOG TXShare Cooperative Program contract:

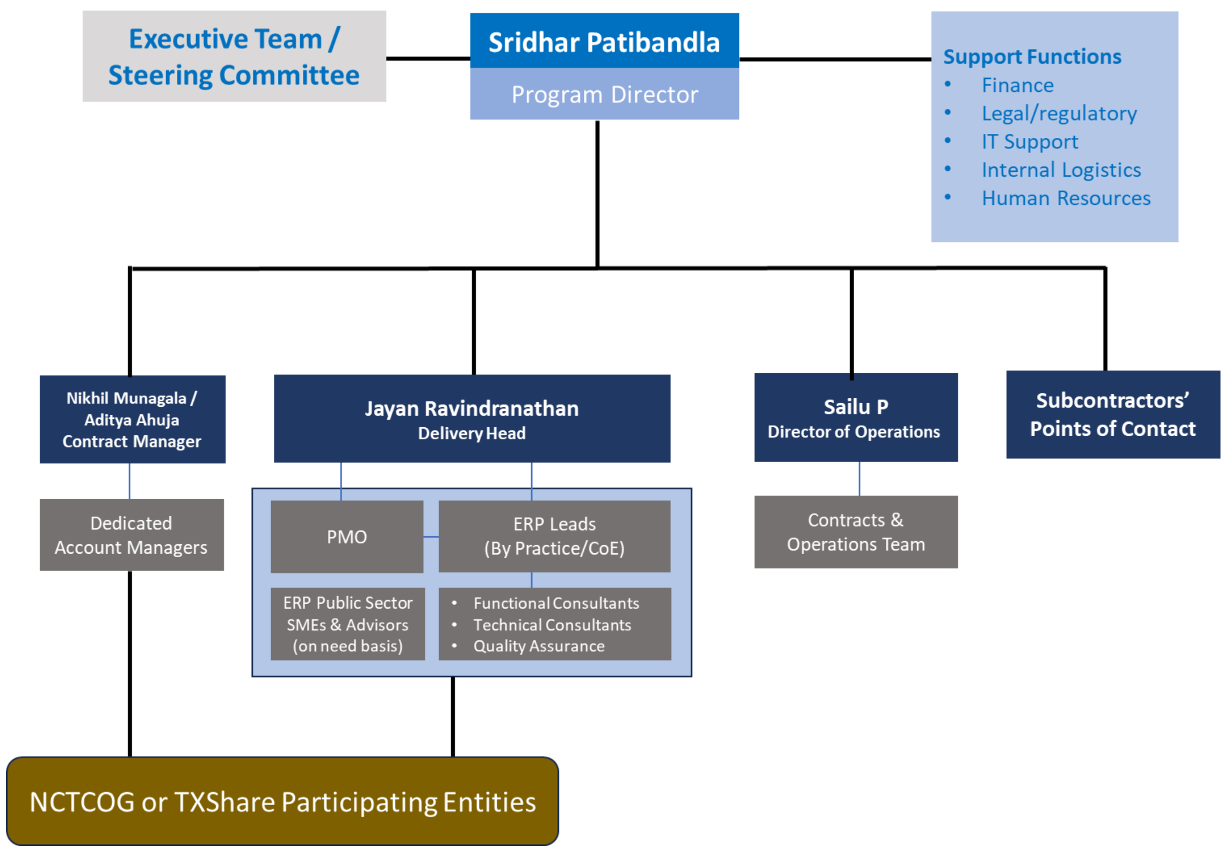

Exhibit 3: High-Level Organization Chart

The above Organization chart specifies our leadership team for this engagement. Please note that Account Managers and Project Managers/Leads will be identified and assigned based on the specific project needs of NCTCOG TXShare entities.

The core responsibilities of each of the assigned team members are listed below:

Responsibilities of the Program Director:

- Provide strategic direction to the overall engagement in terms of customer outreach and customer satisfaction.
- Focus on managing RI's ERP practice and business operations relevant to overall NCTCOG TXShare program.
- Work closely with the delivery head to build the right teams based on the opportunities expected from the program.
- Stay updated on engagements with individual NCTCOG TXShare entities.

- Serve as the final point of escalation in the event of non-performance or unsatisfactory performance of the contract.
- Make the final decisions with respect to adding to the network partner to strengthen the ERP capabilities.

Responsibilities of the Contract Manager:

- Assign dedicated Account Manager(s) for eligible NCTCOG TXShare program entities.
- Participate in all individual customer engagements (oversee resource sourcing effectiveness and efficiency).
- Interface with NCTCOG and Participating Entities' Project/Contract Manager on overall service delivery and performance.
- Keep a close tab on the performance and responsiveness of the subcontractors being engaged on a contract with an NCTCOG TXShare entity.
- Take periodic customer satisfaction surveys.

Responsibilities of the Delivery Head:

- Provide guidance and solutions to the assigned project managers/leads in the event of major updates, issues and escalations.
- Provide necessary support (in terms of resources and advice) to the project team.
- Participate in steering committee meetings.
- Seek regular updates from the Project Manager on the project status, major project milestones, deliverables, and quality standards.
- Monitor overall project delivery and address any issues/escalations.

Responsibilities of Account Manager(s):

- Lead the contract and be responsible for ensuring fulfilment of contractual obligations.
- Keep the Contract Manager updated on any major updates, issues and/or escalations.
- Seek guidance, help and support from the Contract Manager, as and when needed.
- Work closely with the Project Manager/Lead to ensure smooth project execution and timely completion of deliverables.
- Review the terms and conditions, if the event of any changes during the contract duration.

Responsibilities of Project Manager(s)/Lead(s):

- Develop a detailed project plan to track progress.
- Monitor overall progress and use of resources, initiating corrective action where necessary.

- Report and escalate to management as needed.
- Manage the relationship with NCTCOG and Participating Entities' Project/Contract Manager and all stakeholders.
- Oversee day-to-day activities of the project.
- Take primary responsibility for team deliverables, including schedule, scope, and coordination across project teams.
- Coordinate the status of work across project teams (including sign-off).
- Analyze weekly project status reports. Drive issue management process including issue escalation.

Responsibilities of ERP Public Sector SMEs and Advisors:

- Provide guidance to ERP project leads on full-cycle implementations, upgrades and production support.
- Participate in As-Is, To-Be, Fit/Gap Analysis for critical projects.
- Leverage decades of experience with statewide systems in Texas State Government for providing necessary inputs during ERP planning initiatives with similar public sector clients.
- Building customer relationships and providing strong customer service for critical ERP engagements.

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V. TECHNICAL PROPOSAL

i. Proposed Product Categories

Based on our understanding of the Product Categories outlined in the RFP, RI proposes to offer its services for each of the six (6) product categories:

- **Product Category #1:** Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure through a contract on the TXShare Cooperative Purchasing Program.
- **Product Category #2:** Provide ERP Consultancy Services to assist NCTCOG or TXShare Entity's research and preparation for ERP implementation through a contract on the TXShare Cooperative Purchasing Program.
- **Product Category #3:** Provide ERP Consultancy Services to implement or replace an ERP system for NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.
- **Product Category #4:** Provide Standalone Review and Documentation Services of TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation through a contract on the TXShare Cooperative Purchasing Program.
- **Product Category #5:** Provide ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa for the NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.
- **Product Category #6:** Provide ERP Consultancy Services otherwise not anticipated in this RFP.

<u>Our ERP Practice:</u>

There are several ERP technologies in the market. Our expertise and experience cover the following technology groups:

Exhibit 4: ERP Technologies

ii. RI's Capabilities for Product Category #1

RI offers application managed services for deployed ERP software applications with an objective to maintain/support/enhance the application and keep it relevant even in near future. Our services do not cover any hardware and/or infrastructure.

Our capabilities in this category encompass a wide range of services, processes and methodologies as described below:

Support Levels:

Our application managed services include three (3) levels of support. The first level is a centralized **Help desk (L1)** providing the "first line of defense" and routing the tickets to skilled professionals at level 2 and level 3 **(L2 & L3)** based on the severity of the ticket. Help desk is available 24/7.

Here is a depiction of our service request/ticket handling procedure:

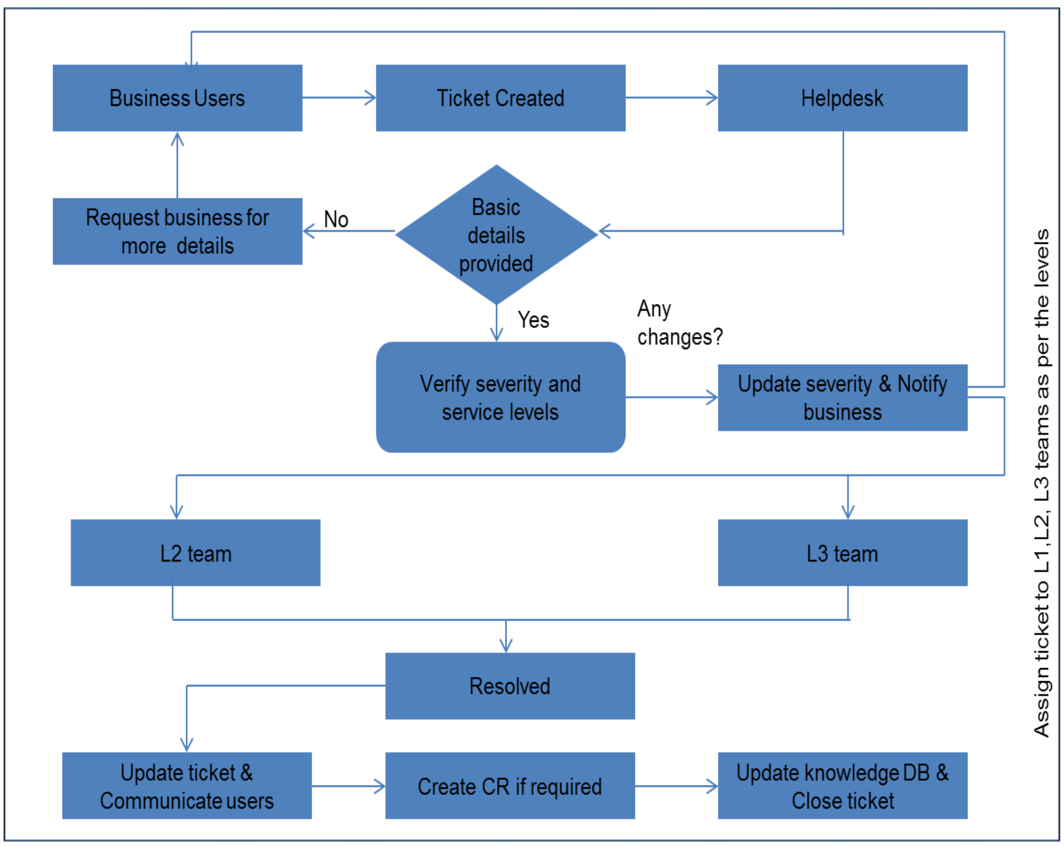

Exhibit 5: Support Ticket Response Process

Some of the key elements of RI's incident and service request management process include:

- **Prompt communication** and support to minimize disruption to business operations. RI Support team promptly acknowledges an incident/service request.
- We typically utilize a tool (such as ZOHO CRM) to provide a **formal communication mechanism**. Through this tool, RI Support Team informs the client about the incident's occurrence, initial impact, and the steps being taken to address it. This communication

demonstrates transparency and assures the client that the issue is being actively managed.

- RI Support Team performs **detailed root cause analysis** for recurring issues to identify underlying problems and implement long-term solutions, reducing the likelihood of future incidents.
- RI Support Team also provides an estimated completion time for any service request(s) that require any new feature development or configuration involving functional and technical resources.
- Support requests that are made to the **ticketing tool are prioritized** based on the nature, severity and time of the request by the Client's team/staff. We agree on the Service Level Agreements (SLAs) with the Client organization for the incidents and service requests for each priority level as defined below.
- The following priority definitions for have been developed to service our ERP clients in the most efficient manner possible.

Priority	Business Impact
"High" Organization Critical	Emergency. Service needs to be provided as soon as possible. Major impact on more than one person or VIP if Service is not provided.
"Medium" Customer Critical	Requestor cannot carry out normal work responsibilities and no alternative is available if Service is not provided.
"Low" General Request	Requestor can carry out normal work responsibilities and/or temporary alternative is available until Service is provided. Enhancement, planned Service, general application questions

Table 8: Service Request Priority Definitions

Incident Severity	Business Impact
"High"	An Incident affecting a business-critical application or Service that affects a high number of Users and for which a delay in restoration of Service is not acceptable. Needs to be resolved as soon as possible. Major impact on more than one person or VIP. An outage or a major loss of functionality of a business-critical application. Illustrative examples of Sev1 Incidents include: • A major loss of functionality affecting online software or batch commitments. • Multiple applications and/or business units affected (for example, the loss of an entire cluster or a production database supporting multiple applications). • Loss of a network component (or other equipment failure) that has a major impact to business functions impacting large workgroups and/or multiple sites.
"Medium"	An Incident affecting a business important application or Service is significantly degraded wherein a high number of Users cannot carry out normal work responsibilities, no alternative is available, and for which a delay in restoration

Incident Severity	Business Impact
	of Service is not acceptable. Illustrative examples of Sev2 Incidents include: • Potential medium impact loss of functionality affecting mobile software or batch commitments, for which preventive action must be taken immediately to prevent an outage. • A medium impact loss of functionality affecting mobile software application, single business unit, or multiple small workgroups for which a satisfactory Client agreed workaround or bypass is available, but the functionality remains materially degraded.
"Low"	An Incident affecting normal (non-critical or important) mobile application and a limited number of Users. System or component is down or degraded, but requestor can carry out normal work responsibilities and/or temporary alternative is available. Low or no visibility that has no direct impact on systems, users, or revenue. Illustrative examples of Sev3 Incidents include: • A partial or limited loss of functionality • Minor application errors • Database, server, or application access problems • An isolated impact to business units • An impact limited to a single User and does not involve a critical or important application • No apparent loss of functionality and only minor functions impaired • No impact on business units • A condition that may signal the need for preventative maintenance • System processing or results are deemed to be misleading or confusing to the End User • End User or system documentation related to a production system found to be erroneous or misleading.

Table 9: Incident Severity Definitions

<u>Service Desk:</u>

RI's Service Desk support includes the following:

- Implement a systematic process for Service requests and reporting incidents or problem
- Implement change control process to document and approve all changes before design & development
- Documentation of escalation procedures for both functional and technical hierarchal response, descriptive procedures, and contact information for each level of escalation
- Resolution of application user queries, answer questions, research problems
- Response to requests for training, user demonstration, and application information

<u>Production Support:</u>

RI provides Production support for the deployed ERP software solution, and which includes:

- Identification of Production system faults and defining interim alternative workflows

- Restoration of the application in response to an incident or problem
- Control of Application Version updates
- Change, release, and control of patches, during regulatory & compliance updates, and approved changes.)
- System performance management and database optimization
- Maintenance and Upgrades
- Maintenance of process templates, workflows rules, etc.

Maintenance and Development Support:

RI's Maintenance and Development support would include:

- Backlog management, root cause analysis, and corrective, adaptive, or perfective maintenance
- Design, coding, the configuration of the in-scope solution app changes (i.e., maintenance, patches, and updates)
- Quality testing of changes to be placed into the production environment
- Migration of application releases into production environments
- Performance and process improvements
- Training on demand

Ongoing Maintenance Schedule and Tasks:

- Weekly Tasks: Performance monitoring, log reviews, and backup verification
- Monthly Tasks: Database maintenance, security audits, and user access reviews; Collect and analyze user feedback, implement minor UI/UX improvements, and deploy custom reports
- Quarterly Tasks: Load testing, patch application, and system health checks; Develop and test new features, optimize workflows, and enhance integrations
- Annual Tasks: Version upgrades and disaster recovery testing; Conduct comprehensive system audits, review and update documentation, and provide extensive user training

iii. RI's Capabilities for Product Category #2

RI can help organizations research and choose the most ideal ERP software solution that aligns with their organizational goals and processes. The journey to transition to a modern and advanced ERP software solution starts with understanding your current challenges, expectations and future goals. A thorough assessment is followed by a comparative study of different viable options available in the market and zero in on the one that aligns with your needs.

We have a well-defined process to assist NCTCOG or TXShare Entity's with the research and preparation for ERP implementation:

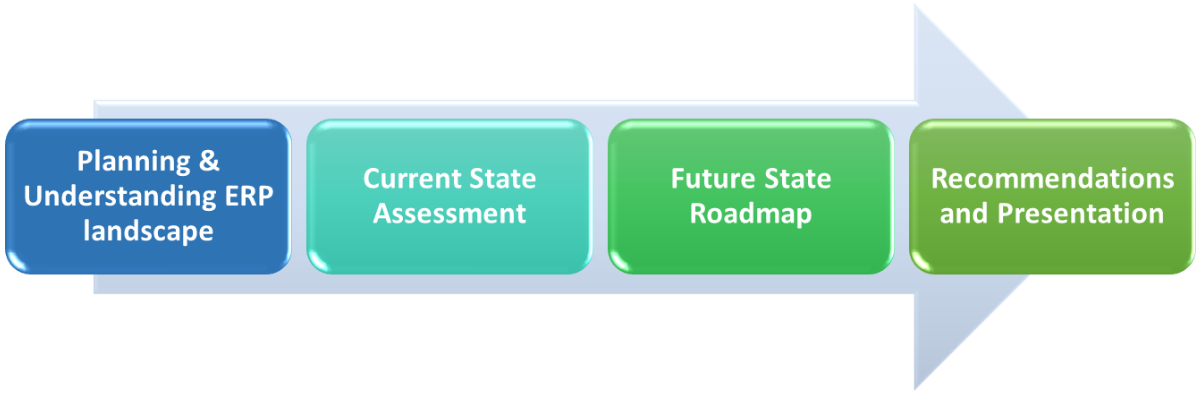

Exhibit 6: Phases for ERP Research and Preparation

Planning for this critical activity with the understanding of the evolving ERP landscape is the most critical step of our approach. Our ERP research team collaborates with the key stakeholders from the client's team and set the expectations.

Key aspects that are discussed during this phase include but not limited to:

- Discuss readiness activities, procurement activities, implementation activities, lessons learned from similar engagements.
- Quick discussion about current ERP technology and limitations.
- Participants for the current state assessment.
- The understanding of the scope items and their respective priorities.
- The process for reviewing our deliverables.
- Review competing projects and any key dates.
- Discuss the Clients' governance structure and policies that may impact ERP selection and implementation.
- Analysis of change management across clients' organization.
- Determine how we will conduct the rapid current state assessment before delving into researching the viable ERP options in the market.
- Build a workplan for the next phases through collaboration and mutual consensus.

Current state assessment begins through focused workshops with various business/process owners and department key users from the client organization. The focus of these workshops is to gather all business requirements associated with this project.

We make sure our clients get the maximum benefits from a thorough current state assessment as enumerated below:

Benefits	Description
Alignment	Investigating how your current ERP environment aligns with the strategic plan is critical. Many clients engage on these types of projects because their existing ERP platforms do NOT align and are considered a risk to achieving their strategic goals and objectives. We conduct a thorough assessment of your current state through the prism of your strategic plan and guide you on future activities.
Engagement	Current state process documentation involves having detailed cross-functional conversations about how things work today, in the context of making changes in the future. As such, these conversations naturally build awareness and engagement in your key stakeholder groups, kick-starting your change management program.
End-to-End reference materials	By thoroughly documenting critical business processes from start to finish, our clients gain a valuable set of reference documents that will assist in future state ERP implementation and design thinking as well as future state process documentation. These documents could include complete process flow narratives, detailed visual process maps and use cases for each of the functional areas. In addition, having a validated set of current state documentation provides a single "source of truth" for functional and technical resources and avoids wasting time debating what current state is supposed to be.
Shadow System Identification	Documenting current end to end processes has a side benefit of identifying shadow systems and data sources that might not be visible to the project team and surfacing them provides the opportunity to work to retire some of those shadow systems.
Decision Identification	By doing current state documentation cross functionally on identified core processes, our clients will be able to surface earlier in the process important decisions that need to be discussed, understood, and decided - that extra time to finalize decisions is very important in public sector where shared governance and consensus are important.

Table 10: Benefits of Current State Assessment for ERP preparation

Current state assessment activity typically includes the following key tasks:

- Review current ERP applications including customizations and third-party integrations
- Interview users of the applications and those impacted by the technology.
- Current state analysis of data governance capabilities.
- Current state analysis of organizational governance.
- ERP modernization project staffing analysis to review the current staffing levels in key areas and proactively identify "leads" and "backups" in each critical area necessary for a successful modern ERP implementation.

Customizations to the legacy platform must be documented with details pertaining to why they were created, who approved and what problems the customizations solve. This data will be used in several areas later to ensure any new platform can meet the needs of the business and the team will have an inventory of topics to conduct "impact analysis" tasks to ensure stakeholders know how their current state will change if the customization goes away or looks different.

Future state roadmap: We compile the data captured in the earlier activities to collaboratively build a roadmap to drive a future set of activities to prepare our clients for any future ERP modernization project. It is imperative that current state requirements be combined with future state requirements to ensure the future technology platform is capable of meeting the needs of the organization. We use the data from the current state analysis to help create any future budgets and plans based on our recommended prioritization to help our clients prepare for any future ERP modernization project.

- We present a comparative study of various viable ERP options and the key deciding factors.
- Deployment recommendation (phased, concurrent, etc.) along with reasoning for recommendation. This would include Timeline breakdown and sequence for each ERP module, Resource implications associated with this deployment scenario, including implementation partner and backfill implications.
- Describe risk, cost, and resource implications related to alternative deployment scenarios for better understanding of the levers and options available.
- Include preliminary implementation estimates.
    - Estimate of cloud-based ERP solution costs, including data costs associated with integrations, data analytics, and other cloud cost implications -
        - Provide quotes from leading cloud solutions for informational purposes.
        - Provide guidance on ERP software selection and evaluation criteria in alignment with the business objectives.
    - Estimation of Implementation Partner (IP) costs.
        - Provide cost breakdown of Implementation Partner costs.
        - Provide evaluation criteria and weighting schemes recommendation for selecting an IP.
    - Estimation of Organizational Change Management Engagement
    - Resource forecast and cost estimate - Internal labor requirement (dedicated and partial), augment internal labor, and backfill costs
    - Other implementation costs recommended.
- Provide high-level disposition timeline and factors for the legacy ERP.

During recommendation and presentation, we finally summarize the findings and the recommendations from this exercise with actionable data and the recommended next steps which could be:

- Prioritize the improvement opportunities (based on the final report) to create short term scopes of work intended to “stabilize” the current ERP state while they plan for ERP transition.
- Create a data governance strategy before selecting a new cloud ERP platform.
- Float an RFI to obtain information related to ERP software products and pricing to use for further analysis. Our expertise working with majority of leading ERP technologies (across

core modules) coupled with our intimate knowledge of all the viable options in the marketplace accelerate the process and provide our clients with a sounding board to think through the implications of change along with the opportunities to transform their current ERP environment.

- Issue a formal Request for Quote (RFQ) for a new ERP software. If our client desires to issue a formal RFQ for ERP software vendors to submit their estimated costs, we can provide the RFQ document for their procurement department to issue. If the client does not want to issue a formal RFQ, we will take the data we gathered through the analysis and research and work with the various ERP vendors to get the associated costs for software and services. Please note we have access to the senior leadership at Oracle, Workday, Ellucian and other ERPs.
- Create a project to streamline current state processes to increase operational efficiencies.
- Create a new initiative to delve deeper into current staffing challenges.

iv. RI's Capabilities for Product Category #3

Implementation of a new ERP software solution requires a proven and well-defined methodology that follows industry best practices. Our project management methodology focuses on continual feedback and interaction with Client's team/stakeholders to define requirements, issues, or problems. We would work collaboratively with the Client team to develop project plan, task description, scope, assumptions, risks, completion criteria and estimated level of effort to deliver. We keep project management process simple, manageable, scalable, accountable and auditable.

Our ERP implementation methodology will have the following key elements:

- There would be **"One Program Team"** across Client organization and RI.
- Operational procedures for how governance will work at the different layers and integration points would be worked out in detail prior to formal commencement of the Program.
- Steady state processes would be governed in a way that the eventual solution is aligned to Client's business goals and objectives.
- RI and Client will **jointly determine** the timelines, effort, roles and responsibilities. We will share the initial timelines and roles and responsibilities for Client's review and approval.
- Joint governing bodies would drive shared ownership of the plan and deliverables.
- Client team would provide guidance and facilitation services for deliverables, wherever stakeholder interaction is involved; similarly, RI would advise/assist the client organization on its core deliverables.
- RI will use a work breakdown structure (WBS) in Microsoft Project for developing project schedule. The project plan will be prepared based on Client's schedule, internal stakeholder requirements, objectives, and resources.

- Project plan will include work breakdown structures, activity sequences, resource assignments, resource hours, projected task completion dates for each resource assigned, overall completion dates for each project, dependencies, project milestones, entry and exit criteria for specific project milestones, and project-specific assumptions. The project plan/schedule will be continuously updated to reflect the current status and changes.
- A Project Portal will be used to store and manage project documentation (i.e., work plans, status reports, and non-code work products).
- We will maintain configuration and version control of project documentation on the Project Portal with access controls for appropriate audiences.
- Dashboards for reporting and monitoring will be readily available online for all project stakeholders.
- RI Project Manager (PM) will adjust resources and schedule, as needed, during project execution, based on a weekly review of project status, and when there is a need for project plan revision based on mutual consensus between RI and Client. The PM will continuously monitor progress against the Project Plan from a schedule, cost, and deliverable perspective.
- RI Project Manager will ensure that a formal process is employed to facilitate communication during the project. There will be two key vehicles for providing this communication. A **weekly status report** and a **weekly status meeting**. In addition, monthly status reports will be created and submitted for the review of Project Steering Committee.
- RI typically employs the following strategies to avoid schedule slippage:
    - Determine priorities
    - Double-check all dependencies
    - Monitor Time-constrained activities
    - Swap and/or add resources
    - Pilot Runs
    - Continuous Improvement to adopt process changes based on project needs

Our ERP implementation approach is described as a five-phased methodology:

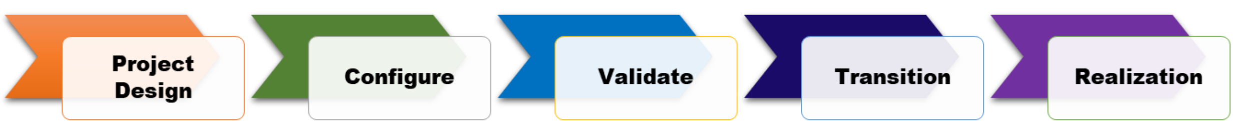

Exhibit 7: ERP Implementation Phases

Each of the phases are described in the below sections:

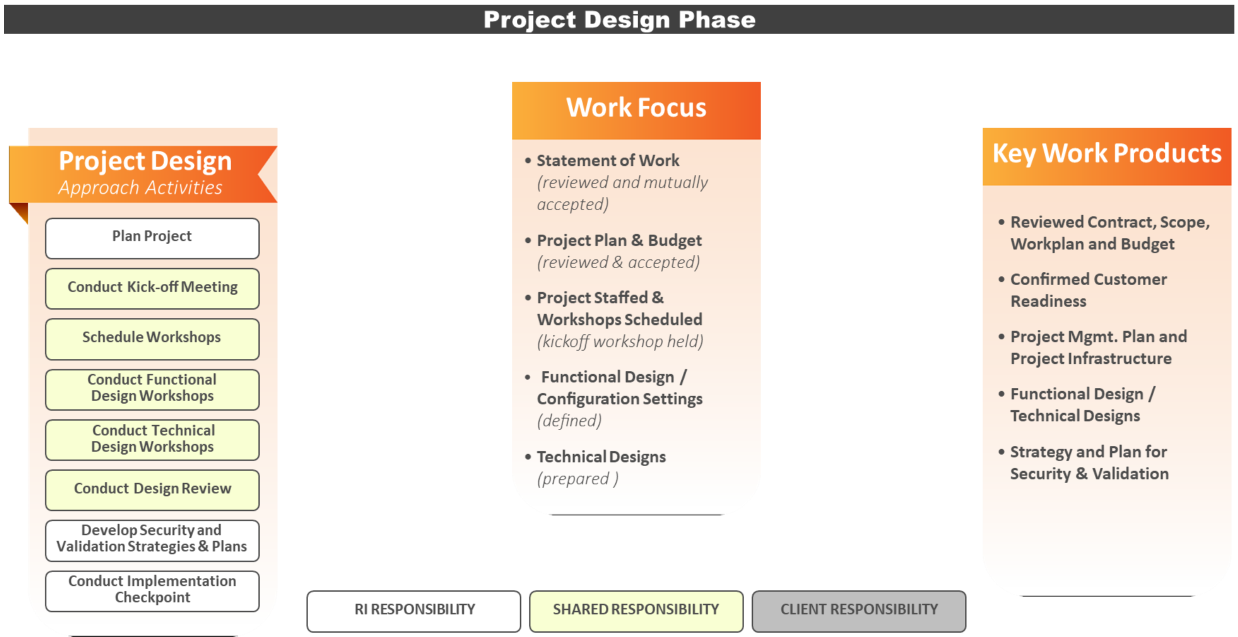

Exhibit 8: Phase 1 - Project Design

During **Project Design phase**, the project is planned and the processes governing the conduct of the project are defined. A Kick-off Meeting is then held to orient the entire project team to the project objectives and how the project will be conducted. Workshops are scheduled and conducted to gather setup information (Functional Design) and define technical details for integrations and data loads (Technical Design). Security and testing requirements are reviewed and plans for addressing them are prepared. The phase concludes with a checkpoint to verify that the phase objectives have been met and necessary approvals obtained.

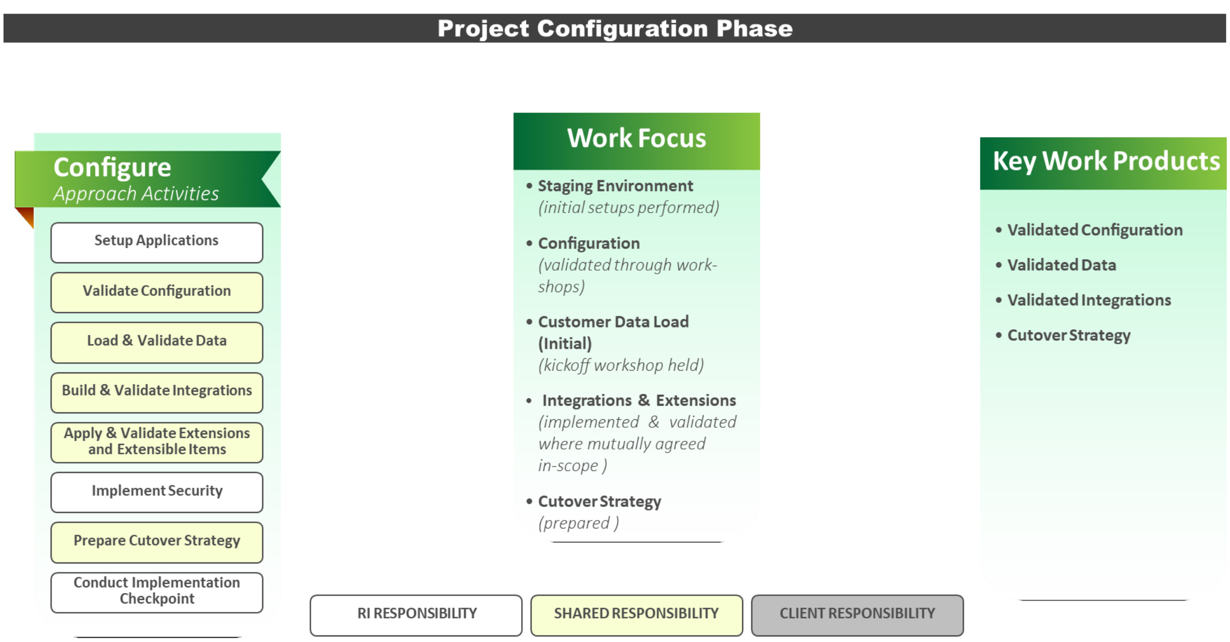

Exhibit 9: Phase 2- Configuration

In the **Configuration phase**, the configuration settings documented in the Functional Design are implemented in the non-production environment. Workshops are then conducted with the respective customer counterparts to demonstrate the standard functionality and validate that the system behavior is as expected and meets the Client's business needs. The Client data is also prepared, loaded and verified during this phase, and integrations, extensions and extensible items built and tested. Security is implemented, and a plan for taking the new system to Production is prepared. The phase culminates with another checkpoint to confirm that the phase objectives have been met and obtain the necessary approvals.

Project Validate Phase

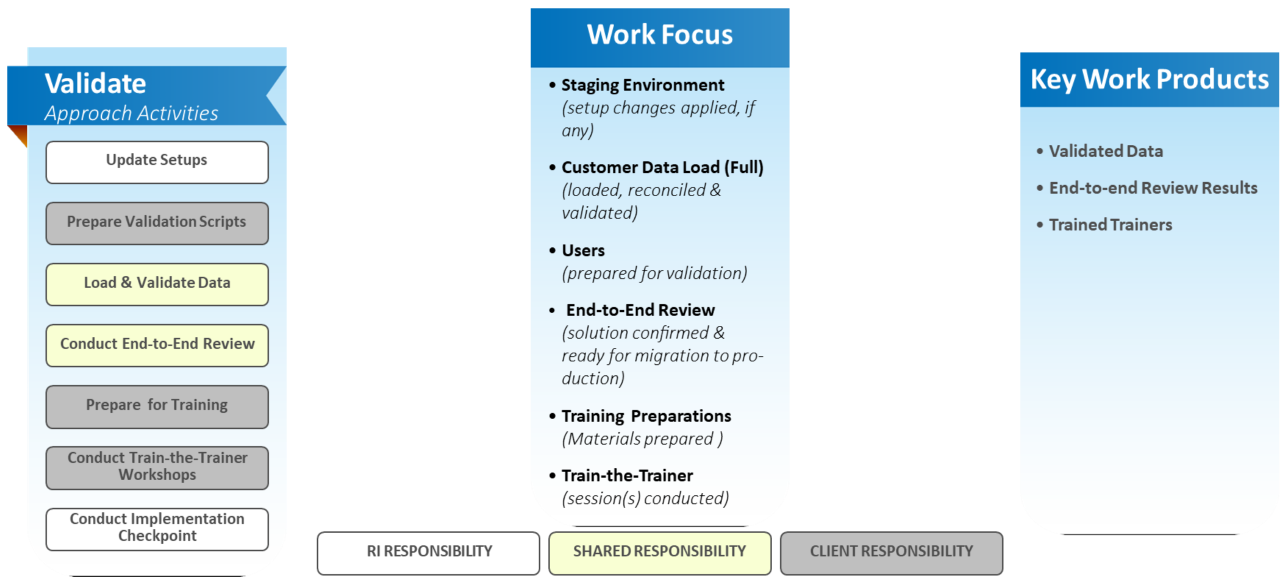

Exhibit 10: Phase 3 - Validation

The **Project Validation phase** is focused on preparing for and conducting an End-to-End Review of the new ERP system, including standard functionality, data loads and integrations. Activities during the Validation phase include the entry of any configuration changes in the non-production environment and the validation of those values. If necessary, business processes and test cases are updated to reflect the resulting state of the environment and sample customer data is loaded in preparation for an end-to-end review.

The end-to-end review conducted in the Validation phase is intended to validate the final configuration, which will be used to configure the production environment in the next phase. During the end-to-end review, a series of Validation Scripts are executed to validate the proper functioning of the solution implemented. The test cases should also exercise the Client data that has been loaded to the non-production environment to validate that the data has been loaded properly. A train-the-trainer event is also held in the Validation phase to prepare designated Client personnel to train end users. Like the previous phases, a checkpoint at the end of the phase confirms that the objectives have been met and necessary approvals obtained.

Project Transition Phase

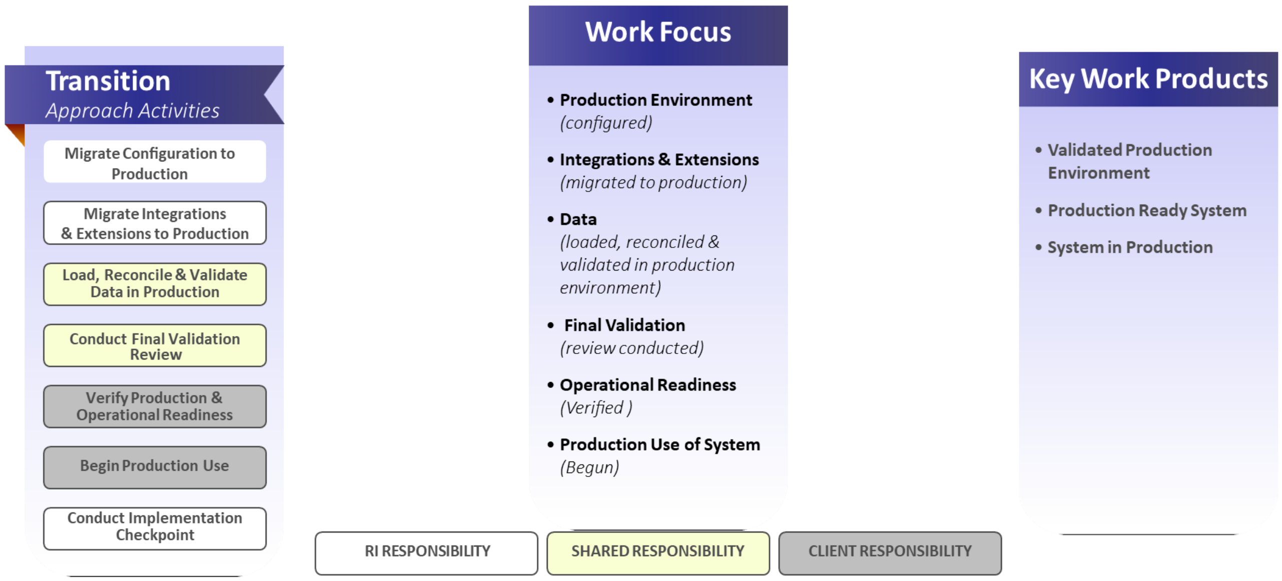

Exhibit 11: Phase 4 - Transition

The Transition phase focuses on moving the new ERP software system and the organization to Production use. The validated configuration is migrated to the Production Environment, the Client data is loaded, and a final review is conducted with users and stakeholders to help ensure that the new environment is ready for use. A production and operational readiness assessment is made as a final checkpoint and the Transition phase concludes with the new system being placed in Production use.

Project Realization Phase

Exhibit 12: Phase 5 - Realization

<u>The Realization phase</u> begins active use of the system and, during the phase, the transition to steady-state operations is managed. This phase also includes any post-production support called for in this contract, the obtaining of the final acceptance of the system, and the closing out of the project and related processes.

In summary, the core objectives of our ERP implementation approach include:

- Rapid design, configuration, and deployment of an initial release of the ERP software solution consisting of standard functionality embodied in the products selected for implementation.
- Emphasis on getting customers up and using the new system in less time and at a lower cost following a standard approach.
- Maximize use of best practices inherent in the product.
- Implementation of standard business rules, standard integrations, and standard data loads.
- To the extent possible, implementation of additional functionality and custom integrations (beyond the established scope) should be addressed in subsequent releases.

v. RI's Capabilities for Product Category #4

One of the critical ERP consulting services include standalone assessment and review of the current ERP system, business processes, integrations, and workflows and how they can be improved by addressing the current pain points.

Our team is well equipped to provide an independent and honest appraisal of the issues, current processes, and existing ERP landscape to recommend improvement opportunities and increase efficiencies. Our objective would be to enable an NCTCOG TXShare entity to make confident and unbiased decisions and accordingly plan for future system improvements. Our recommendations typically cover **three (3) aspects** – people, process and technology.

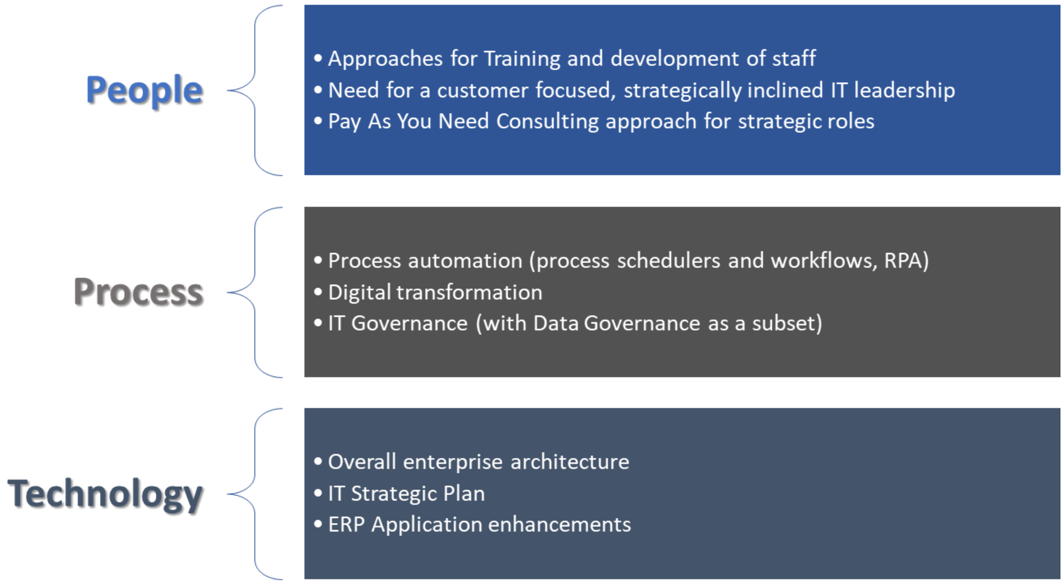

Exhibit 13: Assessment Aspects

RI has a well-defined process to conduct such assessment services. We engage senior and seasoned ERP subject matter experts to conduct these assessments, which would take anytime between **two (2) weeks to three (3) months** depending on the scope and complexity of the business processes and overall ERP landscape.

The assessment is conducted in four distinct phases. Some of the core tasks and activities involved during these phases are described in the below table:

Phases	Key Tasks / Activities
Phase 1 **Discovery**	This phase focuses on gathering critical information about the Client's current ERP implementation and understanding their business needs. • Conduct stakeholder interviews with relevant departments to understand key pain points, business processes, and system dependencies. • Review current documentation, including process flows, system architecture, security policies, and integration points. • Identify business goals and operational challenges that impact the effectiveness of the currently deployed ERP application. • Develop an assessment framework to measure system performance, user experience, and alignment with best practices.

Phases	Key Tasks / Activities
Phase 2 **Current State Analysis**	A thorough analysis of the deployed ERP modules along with the technical components is performed to evaluate their functionality and effectiveness. • Assess system configuration, workflows, and reporting structures to identify inefficiencies and optimization opportunities. • Examine integrations with third-party systems such as payroll, benefits, procurement, and financial management tools. • Evaluate data integrity, consistency, and security to ensure compliance with regulatory requirements. • Conduct a performance analysis to measure system response times, user experience, and potential bottlenecks. • Identify customizations and their impact on system maintainability and upgradeability.
Phase 3 **Documentation**	Comprehensive documentation of the current state and key findings is developed to support informed decision-making. • Create detailed process maps illustrating end-to-end workflows within ERP modules. • Document current system configurations, including roles, permissions, and security settings. • Develop an inventory of integrations and dependencies on other applications. • Outline system limitations and highlight areas that require immediate and long-term improvements. • Prepare a comparative analysis of ERP functionalities, against industry best practices.
Phase 4 **Recommendations**	Based on the findings, strategic recommendations are provided to improve system efficiency and support business goals. • Identify opportunities for process automation and optimization to reduce manual efforts. • Provide recommendations for system upgrades, reconfigurations, or potential migration to alternative ERP solutions. • Suggest best practices for enhancing security, data governance, and compliance. • Develop a phased roadmap outlining short-term, mid-term, and long-term initiatives with estimated timelines and resource requirements.

Table 11: Key Tasks and Deliverables

Deliverables of standalone review and documentation services:

- Stakeholder interview summaries and findings.
- Detailed system documentation, including process maps and integration inventories.
- Assessment report highlighting inefficiencies, risks, and potential improvements.

- Recommendations for process improvements, system enhancements, and future strategy.
- Roadmap with proposed next steps, priorities, and implementation timeline.

vi. RI's Capabilities for Product Category #5

ERP Upgrade:

Upgrading your current ERP software is an essential part of meeting maintenance requirements. It also allows organizations to take advantage of new features, functionality and the opportunity to retire from outdated processes and customization. It is a complicated process which combines the need to evaluate previously developed customizations, introduction of new enhancements and features which may be desirable to implement and business process changes that will ultimately affect the daily activities of end-users of the system.

This is the reason why **fit-gap analysis** is performed before we begin any ERP upgrade work. Our ERP SMEs assist the Client by updating them about the changing features, functionality, implementation methods and possible influence on existing customizations.

Our consultants work closely with the Client's team and analyze all activities from the Business Process perspective, and focus on how the upgrade may impact those business processes and their users, and transfer information about every step in the process.

The key activities that our team performs during the fit-gap analysis include:

- **Review the current state:** RI team interacts with key stakeholders to understand the key business processes and customizations currently implemented at the Client's organization. This helps the team to appreciate and understand the process, features or system currently in place and how they align with the overall business objectives of our client's organization.
- **Identify requirements:** RI team uses the Conference Room Demo method of identifying all the key requirements by demonstrating the features of the upgraded version of the deployed ERP software application. This helps the key stakeholders visualize all the new features and processes delivered as part of upgraded ERP version and identify the ones that they would require.
- **Identify the fits and gaps:** RI team maps all the requirements with what the ERP system delivers and identify the fits and gaps. The team also maps the differences between the current systems that are being used by the Client and the upgraded version and features so that we can identify all the key impacts to the existing processes.
- **Identify the implications:** If any key process would need to undergo a change in order to accommodate the new features and functionality, RI Team identifies a need for Change Management and keeps the client team updated on the same.
- **Recommendation:** This is the final stage of the process where a complete and detailed Fit/Gap analysis document is submitted to the Client Team for their review and approval. This document includes the solution for handling all the Gaps.

We typically follow a five-phased approach when upgrading an ERP application:

Phase/Tasks	Expected Deliverables
Phase 1 - Planning	
• Develop the initial list of tasks and schedule for managing the Upgrade Project. • The project plan is finalized upon completion of any new functionality or customizations reviews. • Define the strategies associated with managing the Upgrade project. This includes the scope definition, issue tracking, escalation management and resolution.	• Baseline Project Plan • Communication Strategy • Change Management Strategy • Status Report Template • Issues Tracking Template • Process Decisions • Change Control Strategy
Phase 2 – Define and Design	
• Define the existing environment and mapping it to the "to be" environment. Featured activities are those associated with fit-gap and prototyping. • Explore the current environment/landscape, including, but not limited to, servers, operating system, RDBMS and workstations, followed up with recommendations. • Review the published ERP software Upgrade updates and fixes; make recommendations for implementation and installation. • Create a detailed upgrade and customization matrix for future reference. • Analyze or set up and run various processes reflecting the Client's current business environment to determine which functions should be added to meet the Client's requirements and the scope of the upgrade. • Review and define strategy documents based on business process requirements.	• Infrastructure Audit Report • Patch Matrix/Log • Customization Log • Functionality Matrix • Fit-Gap Report • Training Strategy • Report / Information Access Strategy • Report Distribution / Printing Strategy • Production Support / Help Desk Strategy • Testing Strategy
Phase 3 - Build	
• Assist the internal Network Administrator, System Administrator and Database Administrators with the setup and configuration of the hardware and software within the Client's network infrastructure, evaluating and improving system and network performance over the course of several weeks. • Execute all upgrade tasks outlined by the ERP software vendor, as well as those identified by the RI Team. These steps include, for example in case of a PeopleSoft	• Customized Infrastructure • Initial Conversion database • Conversion Upgrade Scripts • Conversion/Go-live Task Report • Demo, Development, Conversion and Test ERP Environments • Patch Directory Structure • Conversion/Go-live Task Report • Retrofit Projects • Upgrade Status Tracking Matrix

ERP upgrade, freezing PeopleTools, creating copies of the PROD environment, updating PeopleTools, converting data to the new physical structure, running altering scripts and creating indexes and views. • Complete the initial installation of the ERP software and databases. • Apply specific patches, as needed. • Document the 'test move' and 'move to the production' process, ensuring a smooth go-live. • RI manually retrofits customizations for menus, panels (pages), records, fields, process scheduler definitions and application engine programs. • Modify interfaces, complex SQRs, and Reports. • Upgrade related modifications for Reports and queries are completed. • Develop scripts necessary to test the required critical functionality and processes identified by the test plan. • Create a security matrix and apply database security.	• Reports and Interfaces • Upgrade Status Tracking Matrix • Minor Reports and Queries • Upgrade Status Tracking Matrix • Test Plan • Permission List Matrix • Roles Matrix • Profile Matrix
Phase 4 - Test	
• Run the customized upgrade scripts against copies of the production database for tuning, testing and timing purposes. • Analyze and tune the operating system, database, servers, network, web services and the ERP application. • Update business process documentation with the new version information. • Test functionality of each module and various customizations, reports and interfaces. This testing is component testing and focused on the application's ability to run successfully. • Support end-users during their testing of mock cycles. Test seeks to gain end-user acceptance of the new system and its functions. • Provide delta and train-the-trainer training building upon the Training Strategy developed earlier in the project and Training Manual is created.	• Test Move Database • Conversion/Go-live Task Report • Tuning Analysis and Modification • Updated Procedures • Functionality test reports • Integration Test Results Report • User Acceptance Test Result Reports • Issues Log • Training Manual
Phase 5 – Go Live	

• Make the copy of production after testing at a point in time of minimum activity, run the final upgrade scripts and migrate all data to the new system. • Provide a period of continued support "critical support" to address questions and issues during the transition period.	• Task Go-Live Plan • Production "PROD" environment • Issues/Action Log

Table 12: ERP Upgrade Project - Tasks and Deliverables

Please note that the phases described above - Define, Build and Test phases rarely occur in strict sequence, rather these stages are iterative in nature. For example, as progress is made through the project, further analysis of requirement or redesign of a process may be required due to a change in another part of the system. Additional testing may also need to be performed due to modifications incorporated into the project, but not included in the initial project plan.

On-Premise to Cloud Migration

When we move an ERP from on-premises to a cloud based solution / platform, we typically seek information/details about the Client's current environment(s) to define the migration strategy and methodology. Examples of current environment factors are listed below:

- Inventory of on-premise and/or off-site hosting
- Current cloud initiatives and strategy
- Budget constraints
- Related programs that could impact cloud migration (e.g., refresh schedules, large acquisitions)
- Description of IT organization, infrastructure, etc. relevant to target applications and services and associated facilities
- List of applications or services expected to be moved to the cloud including their business purpose and context and service requirements in business terms (e.g., revenue cost of unavailability)

RI leads and executes the migration project and will be responsible for installing the non-production and production environments under the client's agreement for infrastructure services with the chosen cloud platform/infrastructure vendor.

We believe **combination of manual effort and automation** is the right approach to ensure a timely and seamless migration to cloud. We propose the following phased-approach to complete a typical migration:

Phase -1

- The RI Cloud Architect will present the solution design and analysis cost. Once it is finalized, Cloud Architect will discuss with Cloud Admins to build the setup based on design. Cloud Admins build the environments phase by phase starting from the Development. Cloud admins and DevOps admins both work together for the build part; DevOps admins will create the code based on the requirements provided by Cloud

Admins. When the code is ready and validated, Cloud Admins begin provisioning the Dev environments using IAC.

- Cloud Admins validate and handover the environments to application and database team and start focusing on the next environments. Cloud Admins also work with Application and database team if they need any additional support on the Dev.
- Based on further understanding of the environments, the plan could be to use Terraform for provisioning (IAC) and Ansible for configuration management. Based on the further CI-CD, requirements will include required tools like Jenkins, Git, etc.
- Cloud Admins and DevOps admins do the phase-by-phase approach for each environment including required testing till Prod goes to live.

Phase -2

- ERP Admins start to install the packages, create users, and configure the application files. ERP Admins perform the installation using automation tool or by involving DevOps Admins to automate this using Ansible. They also involve Cloud Admins wherever the additional support required. They work with Database Admins wherever the database support required.
- ERP Admins involve Cloud Admins to migrate the data, scripts, and config files from on-premises to the cloud. Cloud admins provide the solution based on the data size.
- ERP Admins do the phase-by-phase approach for each environment including required testing till Prod goes to live.
- Phase 2 and Phase 3 go parallel.

Phase -3

- Database Admins start to install the packages, create, and authenticate the users and configure the database files, etc.
- Database Admins perform the installation and configuration using database scripting or by involving DevOps Admins to automate this using Ansible. Database Admins involve Cloud Admins wherever the additional support required.
- Database Admins migrate the database and involve cloud admins to migrate the data, scripts, and config files from on-premise to the cloud.
- Cloud Admins provide the solution based on the data size. Also, database admins involve ERP Admins when application support required.
- Database Admins do the phase-by-phase approach for each environment including required testing till Prod goes to live.

Phase -4

- ERP Admins work for the certifications, and migrate the ERP Environment.

- ERP Admins may also involve Cloud Admin and DevOps admin based on the support required.

Phase -5

- ERP Admins enable the third party (external vendors) access, configure the specific ports, sftp and other services along with the Cloud Admin.
- Each environment is tested and validated (performance and other testing) before moving to the next environments.

vii. RI's Capabilities for Product Category #6

RI offers several services as standalone offerings to bigger ERP engagements. Additionally, RI is the authorized reseller of some ancillary products that bring a lot of value to our ERP projects with various clients.

We have described these services and products below:

Optional ancillary services and products	Description
1. Support user training and adoption	For engagements that involve our areas of ERP expertise, we offer our services for the creation of user manuals, help guides, quick reference checklist, FAQs etc, which form an integral part of user training and adoption.
2. Project management services	RI has experienced ERP project managers and program managers who get engaged on critical projects to provide overall project coordination and management services encompassing all aspects of the planning and ERP implementation processes. We represent our clients as part of the project team and engage with the implementation vendor on a daily basis. For example, RI has provided project management services to Texas Comptroller of Public Accounts as well as to **Texas Health & Human Services** Commission on their ERP projects. Right from Project Initiation to Project Planning, Project Execution and Control to Project Closure, we manage every aspect/step. We also assist with risk and issue management as well as project scope management. We work with our client to implement a process that manages on-going change by working with project stakeholders. This enables us to anticipate project conditions, provide our clients with an early warning of potential project impact, and present the client with options and recommendations that enable informed decisions to move ahead.
3. Change management services	We believe that Change Management is a key differentiator between ERP implementation projects that succeed and those that do not. The "people" side of these projects can make or break the success of the entire effort, so it needs to be carefully planned, managed and it needs to leverage experienced professionals in the process. As part of our change management services, which begin right with the implementation project kick off, we typically perform the following core tasks: ▪ Prepare Organizational Readiness Assessment Report (People, Process and Technology).

	▪ Change management planning
	  ○ Identify roles and responsibilities.
	  ○ Identify schedule and touch points.
	  ○ Identify processes and methods to track and monitor the progress on change management activities.
	▪ Assist the client team to assign a sponsor, leader, and change agent network.
	  ○ The change management network will comprise of change agents ("champions") who will advocate the change, help support training, and build ongoing adoption, "champions". These individuals will be identified early in the lifecycle of your program and their roles/responsibilities and involvement will change as the program progresses.
	▪ Build a communication strategy that focusses on the following:
	  ○ Articulate a vision, case for change, what is changing and what's not, roles and responsibilities, change process, and link to strategy.
	  ○ Help people become committed to the new direction by providing them with opportunities to question, digest, and internalize the change.
	  ○ As change progresses, celebrate successes, share recommended practices, and capitalize on opportunities to highlight the performance and behavior that are aligned to the new ERP.
	▪ Conduct Training Needs Analysis to identify skill gaps and applicability of existing training programs.
	▪ Work with the client team to design/redesign –
	  ○ Roles and responsibilities to support new capabilities
	  ○ Reporting structures, compensation, and headcount to support new capabilities
	  ○ Recruiting, selection and placement criteria to support new capabilities
	  ○ Performance management criteria to support new capabilities.

4. Quality Assurance services	In order to validate/re-validate the performance, accuracy, usability and relevance of an ERP application, some organizations look for additional third-party testing services. RI offers testing as a service in the following areas: ▪ Functional Testing: Testing of interfaces, reports, business processes, UI/GUI Testing, device compatibility; whether the ERP application is meeting the business requirements. ▪ System Integration Testing (SIT) – Validating data, reporting, security, and integrations have been designed and configured as expected ▪ Load Testing: Assess if the ERP application can manage high loads given a high demand from end-users; load testing investigates how the system acts under normal and high loads. ▪ Performance Testing: Testing the responsiveness, speed, and stability of the ERP software application when subjected to a workload. ▪ Quality Assurance Testing: Testing Mobile app Testing: Testing the mobile app(s) for both iOS and Android
5. Data integration, conversion and migration services	▪ Every ERP application is required to integrate seamlessly with multiple data sources and third-party applications to ensure smooth business operations. RI provides integration services for ERP applications with a wide range of databases, applications and data sources with the help of robust connectors and APIs. ▪ RI also helps in with data conversion/ migration process, including procedures, mappings, and validation steps for legacy ERP replacement

	projects. We also use proven automated tools to make data migration process quick and effective.
6. Data management services	RI provides data management / engineering services for organizations that need robust data engineering capabilities to support their data transformation journey. These services include: o Data Consulting Services o Data Management Platform and Data Warehouse Management o Data Platform/Warehouse Modernization o Data Governance & Security o Data Modelling o Data Infrastructure Management o Data Research and Analysis o Data Analytics & Support Services o BI / Data Warehouse Implementation o Data Retention & Purging

Table 13: Ancillary Services and Products

viii. RI's Capabilities – Primary Components of ERP

RI has worked with multiple public sector organizations in ERP contracts involving the primary/core components as listed in this RFP. We have outlined our experience and capabilities in these areas below:

1) Accounting and Financial Management

RI has worked with several state and local governments in implementing ERP and managing their accounting and financial operations. Our expertise includes general ledger management, accounts payable and receivable, budgeting, grant management, integrated tax systems, and financial reporting.

We assist clients in streamlining workflows, ensuring compliance with regulatory requirements, and integrating financial data for real-time insights. Our team specializes in optimizing financial processes to enhance transparency, reduce inefficiencies, and support informed decision-making through automated reporting and analytics.

2) Human Resources

RI resources have been providing end-to-end HR support, enabling government agencies to manage their workforce efficiently.

Our services include payroll processing, benefits administration, talent acquisition, workforce planning, compliance reporting, and employee performance management.

We focus on modernizing HR processes by leveraging automation, self-service capabilities, and data-driven insights to enhance employee experience and improve operational efficiency.

Our solutions ensure alignment with labor laws, civil service regulations, and diversity initiatives.

3) Customer Relationship Management

We help state and local agencies to improve citizen engagement and service delivery through CRM solutions, tailored to public sector needs.

Our expertise includes case management, constituent tracking, service request management, and communication automation.

By integrating CRM applications with other business functions, we enable agencies to enhance responsiveness, personalize interactions, and improve overall service quality.

4) Business Intelligence

We support the agencies to transform their raw data into actionable insights.

We specialize in data integration, visualization, and predictive analytics, enabling decision-makers to monitor key performance indicators and track program effectiveness.

By leveraging advanced analytics, we help agencies optimize resource allocation, detect fraud and anomalies, and improve strategic planning.

Our solutions support data governance, ensuring accuracy, security, and compliance with public sector reporting requirements.

We use third-party products (as authorized resellers) designed to integrate disparate systems including ERP, Internal apps, third-party apps and files to harmonize the data for reporting.

We also help our customers in building data warehouse for data storage and distribution.

5) Supply Chain Management

We assist our clients in optimizing their supply chain operations, from procurement to vendor management and contract administration.

Our capabilities include demand forecasting, inventory optimization, supplier performance tracking, and risk management.

We help agencies reduce costs, ensure compliance with procurement regulations, and improve supply chain resilience through automation and real-time analytics.

Our solutions enhance transparency and efficiency, ensuring critical goods and services are procured and delivered effectively.

6) Manufacturing and Logistics Management

We provide consulting services with respect to production planning, asset tracking, maintenance scheduling, and fleet management.

Our solutions help streamline operations, enhance quality control, and ensure regulatory compliance.

By integrating manufacturing and logistics workflows, we enable agencies to improve productivity, reduce waste, and optimize distribution channels for public programs and emergency response operations.

7) Inventory Management

Our inventory and warehouse management services help agencies efficiently track, order, store, and distribute materials. Our expertise includes real-time inventory tracking, automated replenishment, warehouse optimization, and asset lifecycle management.

We assist agencies in reducing waste, improving stock accuracy, and ensuring timely availability of critical supplies. Our approach enhances operational efficiency and ensures compliance with public sector inventory regulations.

8) Warehouse Management

Our inventory and warehouse management services help agencies efficiently track, order, store, and distribute materials. Our expertise includes real-time inventory tracking, automated replenishment, warehouse optimization, and asset lifecycle management. We assist agencies in reducing waste, improving stock accuracy, and ensuring timely availability of critical supplies. Our approach enhances operational efficiency and ensures compliance with public sector inventory regulations.

ix. RI’s Capabilities – Other Features

RI would like to present its capabilities for some of the features/modules included in the RFP under “Other Features”.

1) Risk Management

We conduct assessments and provide monitoring services for financial discrepancies and security vulnerabilities to help our client organizations in identifying risks before they escalate. We also incorporate role-based access controls and segregation of duties to ensure robust internal controls and enhance transparency in risk reporting.

This approach not only facilitates compliance with evolving regulatory standards but also supports informed decision-making.

2) Sales Order Management

Irrespective of the ERP software application in use, we can support and optimize the entire sales order management process.

We begin by first understanding the unique workflows and challenges of each client to ensure that every stage of the order lifecycle, from initial order capture and validation to fulfilment and invoicing can be analyzed for improvements and optimization. Our expert teams collaborate closely with business leaders to map current processes, identify inefficiencies, and implement best practices that enhance accuracy and speed.

We provide process improvement support, including training, change management, and performance monitoring, ensuring that sales orders are processed efficiently and align seamlessly with other critical business functions such as inventory, logistics, and finance.

3) E-Commerce Market Management

We can work closely with our clients for managing product catalogs, streamlining online order fulfilment, and ensuring smooth payment processing. Our approach emphasizes robust market analytics and performance monitoring, enabling organizations to adapt swiftly to shifting consumer behaviors and market trends.

4) Advanced Planning and Forecasting

We provide advanced planning and forecasting services through a comprehensive suite of enterprise performance management modules that drive integrated financial and operational insights. We work collaboratively with clients to streamline planning cycles, develop forecasting models, and align strategic goals with actionable data.

We focus on mapping out business drivers, establishing clear performance metrics, and designing scenario-based models that adapt to dynamic market conditions.

x. RI's Response to Operational Challenges

Challenge Statement #1: *How can your firm assist in the maintenance and efficiency improvements of or the total replacement of a public-sector entity's legacy Budget, Financial Management, Financial Reporting, Procurement, and other logistical systems?*

In our experience working with public sector entities, we have observed that many organizations suffer from the lack of integrated systems. As a result, they need manual intervention which introduces data inconsistencies, inaccuracies, and poor reporting. Paper-based environments, manual processes, and the lack of flexibility of legacy systems leave government agencies with an array of redundant, time-consuming, and unreliable processes.

When RI is engaged for maintenance and efficiency improvements for legacy Budget, Financial Management, Financial Reporting, Procurement, and other logistical systems , we conduct an in-depth understanding of the current processes, pain points and areas of improvements. Our review and analysis focus on budgeting, financial management, financial reporting, procurement, and other logistical functions.

We next come up with a roadmap that clearly outlines the **Quick Wins, Short, Medium and Long-term opportunities** and improvement plans based on the specific needs, priorities and budget of the public sector organization.

Building seamless integrations, introducing process improvements through automation, and delivering enhanced features and functionality are certain key tasks that our team performs as part of maintenance and efficiency improvements.

For the long term, our recommendation for a public sector entity is to transition from the legacy ERP system to a cloud-based ERP solution that is designed to transform government operations and deliver both business and technology outcomes. We can help them choose, plan for and implement the most ideal cloud-based ERP solution. Our software vendor assessment services rigorously evaluate potential partners, considering factors such as functional fit, implementation expertise, and long-term support capabilities. We also offer change management services to ensure a smooth transition to a new process/technology.

***Challenge Statement #2:** How can your firm reduce the sizable technology risk exposure resulting from software obsolescence, hardware/technical infrastructure obsolescence, and the increasing scarcity of technical resources?*

In today's rapidly evolving technology landscape, technology risk exposure owing to software/hardware/infrastructure obsolescence and resource scarcity is a common problem faced by organizations. Reducing such as risk requires extensive planning, strategic roadmap and leadership commitment. RI can help organizations by providing strategic advisory services in following areas:

a. Technology/IT deep dive for a comprehensive technology roadmap:

RI can perform technology assessments to help organizations identify technology areas which are no longer relevant. We can provide detailed studies on the latest technology trends, so organizations can make informed decisions about which technologies to adopt and which to retire. Based on the assessment, we will develop a comprehensive technology roadmap that clearly outlines the technologies and IT initiatives to invest in over the coming years. An 8-10 years technology roadmap can ensure our client's technology landscape remains up-to-date and is aligned with their organizational goals and objectives.

b. Successful transition to cloud based solutions:

RI believes that investing on cloud-based solutions can help organizations avoid technology obsolescence by providing access to the latest hardware and software without the need for constant upgrades. Moreover, moving to cloud-based solutions can provide increased flexibility and scalability, making it easier to adapt to changing business needs. RI can help organizations transitioning to cloud based enterprise applications/solutions from legacy and on-premise systems. Our vendor assessment process ensures that any new solutions are not only functionally robust but also backed by strong support ecosystems, mitigating risks associated with future obsolescence. We also help in facilitating quick user adoption of the newly deployed cloud-based solutions.

c. IT staff augmentation services:

It is important for organizations to continuously invest in training and development for their IT staff in order to keep them up-to-date with the latest technologies and best practices. However, sometimes there could be urgent need for technical resources which cannot be met by the in-house team. In such scenarios, hiring temporary resources to augment the in-house team becomes necessary. RI can help organizations address the challenge of increasing scarcity of technical resources by providing IT staff augmentation services on 'as-needed' basis.

***Challenge Statement #3:** How can your firm resolve much of the fragmentation of existing administrative systems environment, which hinders process efficiency due to dual data entry, system reconciliations, data-synchronization adjustments, reporting from fragmented data sources, etc.?*

We have seen many public sector organizations as well as commercial entities featuring a fragmented enterprise which refers to a multitude of specialized yet isolated software solutions, conflicting data repositories, or departmental barriers. It can result in duplicated efforts, inconsistent user experiences, and difficulties in obtaining a unified view of the business operations.

RI can work in close collaboration with the key stakeholders to resolve much of the fragmentation and its impact on day-to-day business operations. There are several approaches that we can take:

a. Unified data catalog and seamless integrations:

As an immediate resolution, we can help create a centralized data catalog with defined data governance policies using a proven data governance and engineering tool. Organizations could now easily manage data assets, define access controls, and enforce data quality standards. This leads to improved compliance, minimized data duplication, and increased confidence in data accuracy among stakeholders. With a unified data catalog, users could quickly locate the required data, speeding up decision-making processes. The inherent flexible integration capabilities of a data governance platform allows teams to easily connect with their data pipelines, data lakes, and data warehouses, without disrupting ongoing operations.

b. Choosing a unified technology platform:

The several disparate legacy systems that are poorly integrated can be replaced with a modern SaaS cloud-based enterprise application that can accommodate all optimized processes and business workflows across departments and divisions. RI can play a pivotal role here by providing a comparative study of various viable technology options and helping an organization choose the most ideal solution. Our team can help with the implementation of the new enterprise application as well as with building integrations with various third-party applications.

c. Business process and workflow automation:

We can also conduct discovery sessions to understand an organization's structures, process flows, and the steps required to complete a business operation. Processes that are similar can be optimized and unified before bringing in automation. There are several leading process automation technologies including UiPath and Microsoft's Anytime Anywhere that we can leverage to automate the repeated tasks and reduce manual effort for improved efficiencies.

Challenge Statement #4: *How would your firm incorporate functionality that meets or exceeds Federal security standards (e.g., NIST, FedRAMP Moderate), and provide security functions such as role-based segregation of duties and configurable approval rules that significantly strengthen financial controls?*

While delivering solutions, we incorporate security into every layer to ensure compliance with Federal security standards. We implement robust security frameworks from the ground up implementing stringent encryption, continuous monitoring, and multi-factor authentication to safeguard confidential and sensitive data.

Our solution design approach incorporates role-based segregation of duties, ensuring that no single user can complete a high-risk transaction without oversight. In addition, our configurable approval rules help organizations to define and enforce tailored workflows that rigorously control financial transactions, thereby significantly strengthening internal financial controls and reducing the risk of fraud.

Challenge Statement #5: *What recommended improvements for a system that would be fully integrated with the financial management, asset management, and inventory functions, thereby improving process efficiency and control would your firm suggest?*

Adopting a modern, cloud based SaaS ERP software solution that seamlessly integrates financial management, asset management, and inventory functions into one unified system would be our recommended strategy. The choice of such an ERP solution depends on the assessment of an organization's current processes and workflows to identify inefficiencies such as data silos and redundant manual processes. We can then map these gaps with the capabilities of modern ERP platforms that come with an integrated suite of modules.

Some key capabilities of modern ERP solutions such as Oracle Cloud, NetSuite, Workday Financial Management include but not limited to:

- A single platform supporting end-to-end process integration, encompassing every function from budgeting and financial reporting to asset lifecycle management and real-time inventory tracking.
- Offer real-time data visibility and robust controls that continuously evolve to meet customer needs and regulatory changes.
- Incorporates advanced automation to drive operational efficiencies.

Challenge Statement #6: *What services can your firm provide for better tracking and management of the projects and assets?*

RI's suite of services includes project portfolio management that allow our clients to access real-time dashboards and analytics to monitor project milestones, resource allocation, and risk factors. The objective is to keep the stakeholders updated on project progress and to ensure that every project is on track and aligned with the organization's business goals.

Our asset management consulting services cover the asset lifecycle from acquisition and maintenance to performance evaluation and de-commissioning. We have implemented automated reporting and alert systems to detect issues early, enabling proactive adjustments.

Challenge Statement #7: *How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?*

One of the biggest advantages of adopting a unified technology platform is the opportunity to achieve process standardization that makes business operations more seamless and efficient. However, organizations need to invest time and effort to achieve the same. This is where RI comes into the picture. Our approach to achieve process standardization is two-fold as explained below:

Review current business processes:

We identify every single business process that is defined in the system to carry out a specific task. Additionally, we also list all associated workflows and configurations associated with each business process. This exercise allows us to analyze duplicates of an existing process across an organization and working out a single solution that helps achieve organizational goals faster and more efficiently.

Implementation of a unified process outline through a centralized system:

Once a unified process outline is designed, we implement a centralized system (the chosen unified technology platform) that standardizes workflows across functions such as financial management, procurement, human resources, and supply chain operations. With process standardization across departments and functions, it is easier to bring in automation, real-time data analytics, consistent reporting and overall data integrity.

***Challenge Statement #8:** What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate?*

We have helped automating manual and paper-based processes for several organizations. We have leveraged robotic process automation technologies such as UiPath and Microsoft's Anytime Anywhere to automate the repeated tasks and reduce manual effort for improved efficiencies. We have capabilities in working with AI BOTs to replace redundant manual tasks with Bots working as scheduled or on real-time basis based on event triggers.

Our solutions also incorporate electronic workflows for processes that involve submission, review, and approval of documents and web based forms. These electronic workflows can be incorporated with features such as electronic signatures (such as emSigner) and robust document management system with secure storage and retention capabilities.

***Challenge Statement #9:** What methods could your firm provide for the capturing and production of consistent, expandable set of data?*

RI believes that in today's rapidly evolving digital landscape, data has become the lifeblood of organizations across industries. To stay competitive and make informed decisions, organizations need reliable and consistent expandable set of data generated through robust data engineering capabilities.

RI leverages **proven third-party tools** to provide data engineering services built on a strong foundation characterized by a **centralized data catalog**, **configurable data governance policies** and **flexible integration capabilities**.

- We can help create a centralized data catalog to maintain data governance across various departments and data sources. This helps organizations to minimize duplicates and improve data accuracy and compliance.
- We use tools that offer user-friendly interface to make it easy non-technical staff and business owners to navigate and explore data effectively. Required data can be located quickly thus improving decision-making.
- Our chosen data platform(s) come with flexible integration capabilities that allow organizations to easily connect with their data pipelines, data lakes, and data warehouses, promoting a cohesive data ecosystem, reducing implementation complexity and minimizing disruption to ongoing operations.

- We provide a comprehensive data lineage view, enabling to trace data origins and document transformations at each stage. This helps ensure data compliance, enhanced data transparency, and reduces the time and effort required for auditing.
- Our chosen data engineering platform(s) allow teams to annotate and share valuable insights, facilitating cross-functional collaboration.

Challenge Statement #10: *How can your firm enable a more flexible solution to meet evolving business requirements (e.g., compliance with Governmental Accounting Standards Board [GASB] guidance) that is configurable by business users and does not require software developers to adjust/maintain system rules?*

Modern ERP systems are offering configurable processes that organizations can adjust directly to their specific business processes and needs. The objective is to make organizations and businesses more agile and responsive to continuously evolving industry standards and guidelines.

These modern day ERP solutions are built on flexible frameworks that allow organizations to define, modify, and optimize their workflows ranging from financial processes to human resources and beyond—using intuitive, user-friendly configuration tools rather than extensive code customizations. Such an approach allows organizations to quickly and efficiently update the necessary processes whenever there are changes to regulatory requirements and guidelines such as GASB. In most cases, the changes can be made through configurations rather than engaging technical/IT team.

RI can facilitate this transition by providing organizations with services such as comprehensive process mapping, best practices consulting, data conversion and integration, reporting and targeted training that can help users to fully leverage these modern, SaaS-based ERP platforms.

Challenge Statement #11: *How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility?*

While most modern ERP software applications come with built-in capabilities that comply with Section 508 of the Americans with Disabilities Act regarding accessibility, as solution implementers and integrators, RI needs to customize or develop web portals, applications and mobile app(s) as part of enterprise software solutions.

Our UI/UX developers and programmers adhere to the following accessibility related guidelines:

- Adding textual descriptions to images and diagrams to allow screen reader users to understand them.
- Adding captions, subtitles and transcripts to videos and audio files to help people with visual and auditory hearing impairments.
- Removing time limits or making them adjustable helps people with disabilities who may need more time to complete tasks (e.g., when filling out a web form or reading online content).
- we make them accessible for such users.

- We make screen readers and keyboards accessible to vision impaired users and people with motor-related disabilities to help them interact with online content,
- Adding sufficient contrast to text colors and backgrounds for everyone to be able to read them. This is particularly helpful where color conveys other graphical information such as diagrams, maps, icons and buttons.
- Enable text resizing which allows visually impaired users to increase the size of text content for easier reading without relying on assistive technology.

Challenge Statement #12: *How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?*

Our overall approach to conduct business process reviews is explained in our response in Section v - RI's Capabilities for Product Category #4 - of the technical proposal. At a module or business function level, our approach takes into considerations module specific business workflows and regulatory guidelines, as explained below:

Finance:
For finance, our review focuses on critical functions such as budgeting, forecasting, financial closing, and reporting. We analyze internal controls, transaction flows, and compliance with standards like GASB or GAAP. By identifying bottlenecks and areas where manual intervention slows processes, we recommend solutions that enhance automation, improve data accuracy, and ensure timely reporting.

Human Resources:
For HR, we examine end-to-end processes including recruitment, onboarding, payroll processing, benefits administration, and performance management. Our approach emphasizes the identification of opportunities to streamline workflows, improve employee self-service capabilities, and ensure adherence to employment laws and organizational policies—all while enhancing the overall employee experience.

Academic/Student Affairs:
For academic and student affairs, we review processes such as admissions, registration, student records management, academic advising, and financial aid administration. Our objective is to streamline interactions among students, faculty, and administrators, reduce manual data entry, speed up student enrolments, and enhance the accuracy and timeliness of academic reporting, ultimately supporting a superior student experience.

Procurement:
When reviewing procurement functions, we assess the entire requisition-to-payment cycle, including vendor selection, purchase order processing, contract management, and invoice reconciliation. We look for inefficiencies such as dual data entry and manual reconciliations and recommend process standardization and automation to reduce costs and improve compliance with internal policies and external regulations.

Challenge Statement #13: *How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?*

RI has worked on Time and Expense modules of leading ERP technologies for several organizational entities.

- We have conducted detailed review of current workflows to identify process inefficiencies and pain points.
- Based on the outcome of the review and assessment exercise, we have implemented process improvements aligning with the best practices. These improvements include automated workflows with configurable validation rules, self-service user interfaces, real-time data entry, and mobile-enabled functionality.
- By redesigning approval workflows and integrating these modules more seamlessly with payroll and financial reporting systems, we have reduced administrative overhead.
- We also provided support for facilitating change management and user training to ensure early adoption of the improved processes and workflows.

Challenge Statement #14: *How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?*

While a greater number of entities are looking for cloud service adoption, there are some organizations that may opt to move from cloud-based systems to on-premises based systems due to reasons such as unique business processes, data governance and security concerns, unpredictable and rising costs in the long run or simply because they may be dissatisfied with their current cloud services.

In such scenarios, assessment and planning is a critical step where RI can help. Our review and assessment services will cover the following key aspects:

- Assess existing cloud architecture and the current state of organization's applications and data.
- Define and review the specific goals an organization aims to achieve with an on-premise solution.
- Assess the volume of data and potential data dependencies because the success of the data migration depends on this assessment.
- Assess the compatibility of existing applications with on-premise infrastructure. Some applications may need to be re-factored or re-configured to function optimally in the on-premise environment.
- Assess the preparedness of the organization's on-premise infrastructure to accommodate the migrated applications and data. This includes servers, networks, and storage systems based on the business, performance and security needs of the applications. From security standpoint, it is critical to review the firewalls, intrusion detection systems, and encryption protocols and ensuring compliance with industry-specific regulations governing data storage and processing.

Based on the review and assessment of the above aspects, our team will provide the recommendations on the following:

- A clear communication plan to educate staff members, users and stakeholders about the migration and any adjustments that may need to be made at the user level to make this transition smooth and successful.

- Comprehensive migration plan that includes timelines, resource allocation, and potential challenges.
- A robust data migration strategy along with the most suitable migration tools that ensures minimal downtime and data integrity.
- Steps to ensure the applications seamlessly integrate with the new on-premise infrastructure.
- How to configure the servers, networks, and storage systems based on the specific business requirements as identified during assessment.
- How to implement robust security measures, such as firewalls, intrusion detection systems, and encryption protocols?
- Comprehensive quality assurance testing to identify any issues before the final cloud-to-on-premise migration to help minimize disruptions and ensure a smooth transition.
- Implementation of monitoring tools to track the performance of applications and infrastructure post migration.
- Guidelines to continuously optimize the on-premise environment based on usage patterns and evolving business needs.

xi. RI's Response to Organizational Operations

#	Operational Questions	RI's Response
1.	Description of the Proposer's process for responding to an order for product.	We consider a request from our client as an order for an IT solution/service when we receive a formal statement of work and a purchase order. The purchase order must clearly specify the effort hours and the detailed scope. The dedicated account manager for this account reviews the details with the delivery manager. We would seek clarifications in case of any ambiguity. Once the statement of work and a purchase order are thoroughly reviewed and revised (if required), and signed by both RI and the client organization, we begin planning for the project and also finalize a kick-off date with the client.
2.	Description of the Proposer's process for delivering orders to respective clients.	All project activities and deliverables as part of the scope are executed as per the Project Plan. Quality assurance, post-production critical support and Feedback and follow-up are critical activities of our service delivery to our clients.
3.	Description of the Proposer's customer satisfaction services, to include any warranty and/or repair capabilities.	Once a solution/ERP application is deployed, RI provides critical post-production support for a period of at least two (2) weeks until steady-state

#	Operational Questions	RI's Response
		operations is achieved. Any bugs and issues are fixed during this period. Additionally, RI offers continuous application maintenance and support services as part of annual managed services contract. The account managers conduct quality audits and feedback surveys on a periodic basis to gauge our client's satisfaction levels with our services.
4.	Description of the Proposer's invoicing process used by the Proposer.	RI prefers to follow monthly invoicing process and NET-30 payment terms with its clients. However, sometimes, our clients may want us to go for milestone-based payments process.
5.	Any assumptions made in responding to the requirements.	None
6.	Any exceptions to the requirements. If there are no exceptions, Proposer shall explicitly state that no exceptions are taken to any part of this RFP. Offer must be in compliance with stated term and conditions unless NCTCOG accepts identified exceptions of the Proposer.	RI has **no exceptions** to any part of this RFP and agrees to comply with the terms and conditions as stated in the RFP.
7.	Any special features or services the Proposer is proposing in response to the requirements that are included within the pricing provided.	RI has listed the ancillary, standalone services that it would like to offer as part of our "Product Category #6". Additionally, RI would also like to offer certain products that we would leverage while offering our ERP consulting services. These products are **from third-party vendors / partners** who have recognized RI as the 'authorized resellers' for the same. **<u>Product #1: Test Automation Suite</u>** An end-to-end Test Automation Suite by KTech Products that works with all enterprise cloud and on-premise applications. It reduces testing effort by 70-80% while ensuring 100% testing success. Core features/capabilities include: Test Data Creation and Automated Test Case Execution Effective Management and Tracking of Manual Test Cases Built-in Defect Tracking and Management System

#	Operational Questions	RI's Response
		Dashboards and Reports Providing Real Time Insight into Test Execution Functional Testing Focused on Business Processes Third-Party Integrated Testing Multiple Browser Testing; Mobile Testing Pre-built test scripts for all major ERPs such as Oracle Cloud, Workday, SAP, Oracle EBS, PeopleSoft, and Salesforce **Product #2: emSigner – A Digital Signature Solution** emSigner (by eMudhra) is designed to enable digitization and eliminate manual tracking of routing and pending signatures across enterprise business processes that haunts many organizations across all industries today. Being an eSignature enabled document processing automation platform, emSigner powers electronic signing workflows including bulk signatures to transform customer experience and manage risk governance better. emSigner has several certifications and licenses including WebTrust, HIPAA Compliance, Direct Trust, SOC 2 Type 2, EU GDPR Compliant, and EAL4+.

Table 14: Response to Organizational Operations

VI. PRICING PROPOSAL

Please refer to the attachment – **Exhibit B** – for our proposed rate card for the different roles anticipated for the proposed product categories.

VII. REQUIRED ATTACHMENTS

RI has completed and included the following required attachments and Exhibits as separate uploads.

- Completed and Signed Attachments (Attachment I to Attachment X)
- Exhibits and Pricing Proposal (Exhibit A, Exhibit B and Exhibit C)
- Signed Addendums (Addendum 1 and Addendum 2)