ERPA

NORTH CENTRAL TEXAS COUNCIL OF GOVERNMENTS

Enterprise Resource Planning (ERP) Consultancy Services

RFP #2025-017 | **Due:** February 26, 2025, 2:00 PM CT

Submitted by:
ERP Analysts, Inc.
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(614) 695-6185
solutions@ERPA.com

workday. ORACLE PeopleSoft aws

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1. TAB A: CERTIFICATE OF OFFEROR AND STATEMENT OF UNDERSTANDING

The initial submission pages of your proposal will consist of:

1. *Addenda acknowledgment and signature of authorized representative (page 1 of this solicitation document)*

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.

ERP Analysts, Inc.
Legal Name of Proposing Firm

Matthew McPeek	Chief Financial Officer
Contact Person	Title
(614) 385-1951	matthew.mcpeek@ERPA.com
Telephone Number	E-Mail Address

425 Metro Place N Ste. 510	Dublin, OH	43017
Street Address of Principal Place of Business	City/State	Zip
425 Metro Place N Ste. 510	Dublin, OH	43017
Complete Mailing Address	City/State	Zip

Acknowledgment of Addenda: #1 1/24/25 #2 2/7/25 #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.

Matthew McPeek (Feb 24, 2025 16:08 EST)
Authorized Signature

1.1 ADDENDUM 1

ADDENDUM TO THE
REQUEST FOR PROPOSALS
Enterprise Resource Planning (ERP) Consultancy Services

ADDENDUM NO. 1 **DATE ISSUED: January 24, 2025**

REQUEST FOR PROPOSALS NUMBER: NCT-2025-017
ORIGINAL RFP SUBMISSION DATE: February 5, 2025
REVISED RFP SUBMISSION DATE: February 26, 2025

RFP NCT-2025-017, dated January 6, 2025, is hereby amended to incorporate in full text the following provisions:

Cover Page
Proposal Submittal Deadline
The solicitation response deadline is now Wednesday, February 26, 2025.

Section 3.3 Typographical Error
The deadline for questions for this project is Friday, January 24, 2025.

Section 3.4 Solicitation Schedule

SOLICITATION SCHEDULE
The anticipated schedule for the RFP process is given below. All times indicated are Central Standard Time (CST). NCTCOG may change this schedule at any time through the addenda process.

The anticipated schedule is as follows:

RFP Issued	**January 6, 2025**	
Pre-Proposal Conference	**None**	
Inquiry Period Ends	**January 24, 2025**	**5:00 PM CT**
Proposal Due Date	**February 26, 2025**	**2:00 PM CT**
Executive Board Meeting	**April, 2025**	
Anticipated Start Date	**April, 2025**	

Section 3.5
Proposal Submission

Date of proposal updated to reflect February 26, 2025. All other information remains the same.

Section 3.6 Public Opening

3.6 PUBLIC OPENING
The public opening for this RFP will be conducted at approximately 2:05 PM CT on Wednesday, February 26, 2025. The meeting will be held digitally via Microsoft Teams, and will be recorded for the RFP file. Please be advised that a large volume of proposals will result in delays in the decryption process. Access information and the meeting invite will be posted to Public Purchase prior to the date of the public opening.

Section 5.0
Page 12
Product Category information is hereby modified and replaced with:

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 for NCTCOG or 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*.

Exhibit A
Page 34

Exhibit A is replaced in its entirety with the following page:

EXHIBIT A
Description of Desired Product Categories for Proposed Pricing

Respondents should furnish a proposal that specifies pricing for the products and services they propose.

Responses are encouraged from vendors who can only provide a handful of products and services. Respondents are not expected to be able to provide the entirety of the desired services, though are welcome to if they are able!

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 for NCTCOG or 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*.

Challenge Objectives
The following list of project deliverables are anticipated by TXShare Entities leveraging a contract resultant of this RFP.

In addition to the narratives desired regarding your firm's capability to provide Product Categories 1-6, and the Primary Components/Other Features of an ERP, Respondents are invited to propose solutions that address the following operational challenges, including but not limited to:

- 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?
- 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?

- 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.?
- 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?
- What recommend 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?
- What services can your firm provide for better tracking and management of the projects and assets?
- How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?
- What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;
- What methods could your firm provide for the capturing and production of consistent, expandable set of data;
- 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; and
- How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.
- How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?
- How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?
- How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?

Exhibit B
Page 36

Exhibit B is replaced in its entirety with the following page. No change to Exhibit B Cont'd.

EXHIBIT B
Service Questionnaire

Indicate the services you are able to provide:

SERVICE	YES	NO
Product Category #1		
Product Category #2		
Product Category #3		
Product Category #4		
Product Category #5		
Product Category #6		

Respondents should address the following items in Tab D: Technical Proposal if they are applicable for the service(s) being proposed.

- Respondents are asked to identify services that they are able to provide.
- Respondents are not required to be able to respond to all services in order to provide a proposal to this RFP.
- Those Respondents that are capable of providing more than a single service, indicate which in the table above, and provide an individual narrative relating to the needs of each Bid Item as described in Exhibit A.
- Responses should consist of detailed descriptions of what a Respondent's firm is capable of providing to the TXSHARE Public Purchasing Cooperative. The narrative for each Product Category must be addressed, but Respondents are encouraged to provide additional detail about their operation and capabilities.

Craigan Johnson
Chief Procurement Officer

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: ERP Analysts, Inc.

SIGNATURE: Matthew McPeek (Feb 24, 2025 16:08 EST)

NOTE: Company name and signature must be the same as on the RFP documents.

1.2 ADDENDUM 2

ADDENDUM TO THE
REQUEST FOR PROPOSALS
Enterprise Resource Planning (ERP) Consultancy Services

ADDENDUM NO. 2 **DATE ISSUED: February 7, 2025**

REQUEST FOR PROPOSALS NUMBER: NCT-2025-017
ORIGINAL RFP SUBMISSION DATE: February 5, 2025
REVISED RFP SUBMISSION DATE: February 26, 2025

RFP NCT-2025-017, dated January 6, 2025, is hereby amended to incorporate in full text the following provisions:

Questions and Answers

Question #1

What ERP applications or products are potentially in scope for this contract? Specifically:

- Which on-premises applications are potentially in scope?

- Which Software-as-a-Service (SaaS) applications are potentially in scope?

Answers

Theoretically, the answer is "all of them."

Unlike traditional procurements, the intent of this contract is retain qualified vendors for ERP Consultancy Services that can then be used as-needed by *any* public sector entity that needs such services without their having to perform a subsequent RFP of their own.

While the NCTCOG will consume from this contract as well, the idea of using rate card pricing is to allow Contractors to curate proposals leveraging the Master Agreement that will result from this RFP for any public sector customer they desire to engage with during the life of the Master Agreement.

The hourly rate card allows a Contractor to scale services to any project, regardless of where in the United States they are providing them.

As a result, each subsequent engagement that Contractors will perform with TxShare Participating Entities will itself be unique.

Question #2

Do services have to be performed using only onshore resources or can offshore resources be utilized to deliver services?

Answers

Respondents should identify all services that are provided by offshore resources in their responses.

Question #3

Good morning. Would it be possible to extend the submission date. As an Oracle sales and implementation partner, we are also responding to your RFPs 2025-018 and 2025-023, thus we need additional time. Kind thanks, Kerry.

Answers

Project has been extended for 3 weeks.

Question #4

Does a Vendor/Respondent need to submit at least four (4) references for each of the product categories it chooses to respond to in the proposal? Or a vendor can submit at least four (4) references overall irrespective of product categories?

Answers

The intent is for four references overall.

Question #5

If a Vendor/Respondent chooses to include subcontractors in the response, can it include the subcontractor's project/client references as part of the overall response? Can subcontractor's project references be counted as part of the required number of references?

Answers

References should be for the Responding firm.

Question #6

Is the rate card for the pricing proposal applicable for the entire contract duration i.e, initial period of 2 years followed by optional annual renewals (up to three years)? Can the rates be modified during annual renewals and/or on case-on-case basis?

Answers

TxShare contracts utilizing rate-cards for services anticipate that the fees are static during the initial term.

Recognizing inflationary impacts and market overhead, awarded contractors may propose fee modifications (either increase or decreases) at each of the renewal option years following the initial term.

Such forecasting information should not be included in the original RFP response.

Question #7

Can the Cost proposal be included in the main Proposal or we need to submit it as a separate attachment?

Answers

Respondents may submit a single document or may submit multiple documents (individual Tabs, cost proposal, etc.)

The cost proposal is extracted by the NCTCOG procurement group regardless before being passed to the Evaluation Committee.

Question #8

Is the Vendor Response to this RFP required to be uploaded as a single PDF file or multiple files can be uploaded?

Answers

Please see answer to question number 7.

Question #9

Do we need to complete Exhibit A and upload it as an attachment to the proposal or we can include our response to Exhibit A as part of the "Technical Proposal" section?

Answers

Exhibit A is simply the comprehensive collection of the desired product categories (deliverables) as well as the solicitation challenge questions.

Respondents may elect to provide responses to this section by either addressing it directly as an individual document, or within their technical proposal response.

If they elect the latter, Respondents should include reference to the challenge question they're addressing in their proposals.

Question #10

In Section 5.0 Scope of Work, the list of "Other Features" includes "Sales", "Order" and "Management" as three separate bullets. We undertand that this is a single feature "Sales Order Management". Please confirm.

Similarly, for "E-commerce Market Management". Currently "E-Commerce" and "Market Management" are two separate bullets. Please confirm.

Answers

The product categories and desired features are presented in such a way to organize them into desired services, while potentially using redundant language to ensure no loss of capability in regards to the final product's capability.

Should your firm bundle features such as these under a singular module, please denote in your response what each module does and how it addresses the desired need.

Question #11

As there are multiple catgeories for a vendor to respond, can we request a 2-week extension to the proposal submission deadline?

Answers

Project has been extended for 3 weeks.

Question #12

Do we need to include the completed "Attachment Checklist" as part of the attachments while uploading our proposal?

Answers

The attachment checklist (page 18 of the solicitation) is for your own reference to ensure you've provided a signed copy of each attachment. The checklist itself is not a required item of your RFP response, but please be sure to include signed copies of the attestations themselves.

Question #13

Can we submit an RFP response as a prime as well as be a subcontractor to another firm who submits an RFP response as the prime?

Answers

Yes

Question #14

Will NCTCoG provide more details on expectations under Product Category #3, for example, is the intention for the vendors to propose ERP system solutions or to provide consulting support to a NCTCoG member agency who is implementing/replacing a system with a third-party software provider?

Answers

It is for consultancy services relating to an Entity that is looking to implement their very first ERP system, or to transition to another ERP system.

There will be a forthcoming RFP for ERP solutions themselves. This project is geared for consultancy services used in conjunction with existing ERPs to increase their efficiencies, planning for the initial adoption of ERP, or for any other consultancy related need.

For clarification - another RFP soon to be published by NCTCOG will be for ERP Systems/solutions themselves. That is not the intended purpose of this project (2025-025).

Question #15

Please confirm if the Product Category #1Provide 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 - means providing maintenance / managed services for the deployed ERP application or the IT infrastructure that hosts the ERP application.

Answers

This could be either/or.

The language is intentionally open to allow for the greatest amount of services to fall within each Product Category. The intent is to ensure that Contractors are able to provide services for any potential need that may arise from a TxShare Entity that fall within the parameters of each Product Category.

As multiple entities will consume services off of this contract, we do not desire to artificially limit the services that can be available to them.

This is an enormous value to both the Contractor and their potential clientele.

Question #16

Reference: Attachment IX (HUB, Minority or Women-Owned of Disadvantaged Business Enterprise).

Question: Would NCTCOG recognize MBE certification from either South Central Texas Regional Certification Agency or the National Minority Supplier Development Council?

Answers

Yes, certifications will be accepted as long as they are within valid date periods (if applicable)

Question #17

To provide a comprehensive response across all requested categories, can vendors please have a two-week extension for RFP submittals?

Answers

Project has been extended for 3 weeks.

Question #18

Could NCTCOG provide a copy of CG 20 10-additional insured? Or otherwise provide its additional insured requirements?

Answers

NCTCOG will not be the only consumer off of this contract, and is not considered to be the primary customer.

Any TxShare Participating Entity that has a desire to utilize this cooperative contract will have access to it, therefore it is not prudent to provide only the NCTCOG's insurance requirements.

Contractors will enter into subsequent contracts with each client leveraging the Master Agreement that will be awarded from this RFP. Specific insurance needs will be addressed with each client.

Question #19

Does NCTCOG anticipate the selected firm will hold the fully loaded hourly rates for the 24-month term of the contract?

Answers

Please refer to the answer of Question #6.

Question #20

Is NCTCOG open to negotiating the fully loaded hourly rates per year?

Answers

Please refer to the answer of Question #6.

Craigan Johnson
Chief Procurement Officer

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: ERP Analysts, Inc.

SIGNATURE: Matthew McPeak (Feb 24, 2025 16:08 EST)

NOTE: Company name and signature must be the same as on the RFP documents.

2. A brief statement of the respondent's understanding of the work to be done or desired deliverables requested in the solicitation.

ERP Analysts, Inc. (ERPA) is grateful for the opportunity to respond to the North Central Texas Council of Governments' (NCTCOG) RFP for Enterprise Resource Planning (ERP) Consultancy Services (2025-017).

We understand that the purpose of the solicitation is to identify a firm or handful of firms that have the depth and breadth of experience to support NCTCOG and Participating Entities (via the TXShare Cooperative) as you/they navigate the complexity of, and options for, ERP systems.

We understand the scope of this solicitation is intentionally broad, encompassing a wide variety of ERP consulting services and products including but not limited to:

- Legacy system sustainment
- Legacy system upgrades and cloud modernization
- ERP software advisory and selection support
- Net new ERP software deployment services
- Net new ERP software post-production support and managed services
- ERP system optimization

Lastly, ERPA understands that like many public sector organizations, the ultimate goals and objectives of NCTCOG and Participating Entities include optimizing:

- Operational efficiency
- Costs/total cost of ownership
- Data-driven decision making
- System data and business process harmonization
- Security and compliance
- Organizational readiness for business transformation
- System maintenance and operations
- System Infrastructure
- Scalability and continuous improvement

2. TAB B: KEY PERSONNEL

*If applicable in providing services under this contract, attach statements of qualifications or resumes for all **managers**, **supervisors**, and **other team members** who will be involved in the management of the delivery of goods or services under this RFP. Please note you are not required to name every staff member who may be providing services under the rate card on Attachment B, only those key personnel overseeing the execution of a contract resultant of this RFP.*

From leadership to the consultant level, ERPA's team is deeply experienced and knowledgeable in supporting customers to solve business problems and drive organizational goals and objectives for NCTCOG and Participating Entities. Key ERPA team members include:

Houman Immen – EVP, Workday Practice

Houman leads ERPA's Workday Practice based on his 12+ years of experience in the Workday ecosystem, working closely with Workday to drive Workday Student success. Over the past 21 years, Houman has led sales and go-to-market strategy and implementation for SaaS products for companies such as OneSource Virtual, Workday, Ceridian, ADP, Oracle, and others. Houman received an MBA from the University of Phoenix.

Khatherine Gaines – Director, HCM

Khatherine has over 12 years of functional experience with Human Capital Management (HCM) software applications and implementations. She has more than ten (10) years of functional experience (5 of which were consulting) with Workday post-production support, phase x implementations, and implementations across a variety of industries and global markets. Her experience includes over 30 Workday deployments, as well as involvement in the full implementation life cycle from planning through to deployment, including business analysis workshops to identify improvements and hands-on system configuration.

Workday certifications include: HCM, Talent & Performance, Recruiting, Learning, and Launch.

Alex Maidy – Director, Workday Payroll/Absence/Time Tracking (PATT)

Alex has more than 15 years of SaaS deployment experience globally, with more than five (5) years of Workday implementation experience. Alex has been involved in approximately 20 implementations to date. His experience includes: 15 Phase 1; 5 Phase X, and over 15 AMS deployments. Alex's functional expertise includes HCM, Benefits, Payroll Accounting, and Change Management.

Workday certifications include: HCM, Engagement/Project Management, Launch, LDP, Time Tracking, Canadian Payroll, US Payroll, Absence Management, Performance Management, Talent Management, Scheduling, and Labor Optimization.

Jon Milkovich – Director, Workday Financials

Jon is a Senior Director, Workday Delivery in the Workday practice at ERPA, and an experienced consultant and system administrator. Jon has a unique blend of Workday Financials consulting, administration, and self-implementation experience. He has successfully led the implementation of Workday Financials for numerous companies across a variety of industries. Jon has had various Workday Financials project implementation roles on both the client side and the consulting side. During Jon's time as a Workday Financials consultant, he specialized in financial reporting and change management for energy, financial services, and healthcare clients. After Jon's initial stint in consulting, he managed and self-implemented multiple Phase 2 Workday Financials engagements and was a key member of a Phase X M&A Workday Financials implementation team.

Workday Certifications include: Record to Report, Supply Chain Management, Strategic Sourcing, Accounting Center, Advanced Reporting, Composite Reporting, Dashboard, Financials Pro, Launch.

Rio Ramon – Director, Workday Integrations

Rio has more than ten (10) years of experience in Workday Integrations with over 20 years in technical solutioning for clients. He has led, managed, and architected over 40+ Workday implementations in high-tech, financial services, manufacturing, and government projects.

Workday certifications include: Integrations, Core Connecter Benefits, and LE Deployments.

Vishal Kothari – EVP, Cloud Practice

Vishal leads ERPA's Cloud practice and has over 25 years of experience in delivering ERP and technology solutions. Additionally, Vishal has led managed services operations and engagements for the last 10 years overseeing ERPA's Center of Excellence and managed services delivery operations. Before ERPA, Vishal was responsible for leading project delivery for system integrators and boutique consulting firms such as Hexaware and Infosys. Prior to this, Vishal supported software development projects for Citicorp and Digital Equipment Corporation.

Vishal has an MBA and BS in mechanical engineering from DAVV University in India.

Murthy Suravarapu – AVP, DevOps & Automation

Murthy's IT career spans over 30 years and covers multiple roles providing PeopleSoft Administration, DevOps, infrastructure design and configuration, automation management, integration, and cloud. As an early adopter of cloud, he is adept at identifying cloud solutions to solve business problems and meet goals and objectives. He has deep experience with enterprise applications migration to the cloud, including various cloud training, as well as application and infrastructure managed services expertise. Murthy specializes in cloud architecture design and cloud migration.

William (Bill) Cage – EVP, Applications Practice

Bill has led technology organizations for nearly 25 years. The last 15 have been in consulting and he is currently leading the PeopleSoft practice at ERPA. This practice is focused on managed services and project consulting for ERP with a market focus centered on higher education. Prior to consulting, Bill was responsible for managing the back-office requirements for Time, Inc. Prior to that, he supported the technology needs of retail and mining organizations and served in the US Army.

Bill holds an MBA from Columbia University and a bachelor's degree in mathematics and computer science from the University of Alabama at Birmingham.

Sean Love – VP, Delivery (PeopleSoft)

Sean is an accomplished IT professional with Oracle Cloud Practitioner and Agile Scrum Master certification and over twenty years of PeopleSoft experience in both domestic and international implementations. Responsibilities have included all aspects of program management and full system life cycle including requirements definition, fit/gap analysis, business process design, build, testing design and execution, training, implementation, and production support.

With the exception of our Executive Vice Presidents, resumes can be found in Appendix A.

3. TAB C: REFERENCES

Include at least four (4) recent references for customers (preferably public agencies) for whom you have provided services similar to those requested in this solicitation within the last five (5) years. Please include the organization's name (if applicable), contact person, phone number, and email address for each reference. NCTCOG reserves the right to contact or visit any of the respondent's current and/or past customers to evaluate the level of performance and customer satisfaction.

ERPA has provided references below. Out of respect for client privacy, ERPA requests that the NCTCOG notify us prior to reference checks being conducted so that we can inform our clients and confirm their availability.

Reference 1 Requirements	Information
Organization's Name	City of Boston (MA)
Contact Person	Shiela Lee, Director of Operations
Phone Number	617.635.0048
Email Address	shiela.lee@boston.gov

ERPA has delivered PeopleSoft Managed Services to the City of Boston for 12 years (since 2013) which includes incident management, system monitoring, PeopleSoft administration, database administration, application maintenance, updates and patches, infrastructure management, and upgrade planning. We also provide application development and functional support for the City's PeopleSoft HCM and Finance applications.

With over 600+ HCM and 365+ FSCM customizations in place, ERPA has successfully supported 18,000+ HCM ESS and 1,300+ FSCM users on consecutively awarded contracts. ERPA has delivered significant value through multiple projects such as in-depth security assessment, database re-platform from DB2 to Oracle (nearly 50% savings of license costs) and migrating the City's PeopleSoft infrastructure to AWS Cloud for improved system availability, reduced downtime, increased security, and disaster recovery capabilities.

Key Technologies and Tools:

- ERPA's proprietary cloud orchestration tool ActiveGenie™
- PeopleSoft Software modules: HCM, FSCM
- PeopleTools: HCM, FSCM, PHIRE
- AWS Hosting

Reference 2 Requirements	Information
Organization's Name	City of Raleigh (NC)
Contact Person	Sharon Heaton, IT Manager
Phone Number	919.996.5546
Email Address	sharon.heaton@raleighnc.gov

ERPA has delivered PeopleSoft Managed Services to the City of Raliegh for ten (10) years (since 2015). This includes incident management, PeopleSoft administration, application maintenance, updates and patches, application development, break-fix, and enhancement support for their HCM and Finance systems. Throughout our multiple consecutive contracts with the City, ERPA has successfully performed eight (8) PUM and PeopleTools upgrades and assisted the City in modernizing its user interface, implementing Fluid, and retiring its Portal application.

ERPA provides remote functional, technical, and DBA support of the PeopleSoft applications to improve business request speed and service levels for their approximately 10,000 system users.

The City is unique in that its team has been stable versus many of our clients whose support teams are impacted by budget cuts, retirements, and/or scarcity of applicable skill sets in the market. To this end, we have served as an extension of the City's team, rather than its replacement, placing extensive emphasis on knowledge transfer. ERPA provides services remotely for the City, leveraging the same team since 2015, which includes the lead developer serving as the SDM and coordinating work within ERPA's COE.

As a proactively engaged partner, ERPA provided recommendations and solutions to assist the City to increase efficiency and reduce costs. Through the implementation of Fluid, the City was able to retire its Portal application and modernize its user interface. ERPA designed Fluid homepages around the City's different business functions in each application.

Key Technologies and Tools:

- PeopleSoft Software Modules: HCM, Finance, EPM
- PeopleTools

Reference 3 Requirements	Information
Organization's Name	Weld County (CO)
Contact Person	Robyn Jussila, HRIS Director
Phone Number	970.400.4000
Email Address	rjussila@weld.gov

ERPA provides Full Platform Application Management Services (AMS) inclusive of optimization, bi-annual Workday update support, integrations, payroll processing support, cross-functional support, product roadmapping, post-deployment stabilization, and reporting for HCM, Payroll, and Financials. Our initial focus was on the stabilization of the tenant after a frustrating deployment conducted by another Workday Partner.

ERPA worked closely with Weld County to create a transition plan to ensure successful knowledge transfer was provided by the implementation partner, and optimization of the tenant could begin immediately. This is a managed services engagement under our Workday tiered package model including strong knowledge transfer.

Key Technologies and Tools:

- Workday HCM, Payroll, Financials

Reference 4 Requirements	Information
Organization's Name	City of Vancouver (WA)
Contact Person	Aman Singh
Phone Number	360.487.7679
Email Address	aman.singh@cityofvancouver.us

ERPA's relationship with the City started in 2022 after winning a 5-year contract to provide Workday solutions. Support includes the following areas of functionality:

- Core Human Capital Management
- HCM Compensation, Time Tracking, Absence, Benefits, Recruiting, US Payroll
- Core Financials including Procurement, Expenses, Suppliers, Customers, Settlement, Projects
- Workday Learning Management

- Workday Adaptive Planning

The first project within this contract involved scoping and providing a solution for tracking the City's assets within Workday. A task that was successfully delivered in 6 weeks. From there we coordinated with the City's benefits team to assess and provide an optimization project for their Benefits. This project was a 20-week effort, and it too was delivered on time and on budget. ERPA provided detailed results from our deep dive diagnostic on the current state of the City's Workday Benefits and Asset Tracking and subsequently optimized their Workday tenant eliminating bottlenecks.

Key Technologies and Tools:

- Workday HCM, Payroll, Financials, Learning Management, Adaptive Planning

4. TAB D: PROJECT-RELATED EXPERIENCE AND QUALIFICATIONS

Proposals will be evaluated on the basis of experience in performing the requested goods/services.

*Provide a written response regarding **organization's and/or individual's** ability to meet each requirement as outlined in the Scope of Work (Section 5.0). Include a brief statement of the respondent's background, including years in business, for the requested services and any additional pertinent information on how your proposed solution meets each requirement. Provide any pertinent additional functionality and/or services not outlined in the Scope of Work that you wish to offer. It should also clearly indicate any major requirements that cannot be met by the organization or individual.*

ERPA was **founded** in 1999 with a focus on implementing, optimizing, modernizing, and supporting critical enterprise applications like PeopleSoft and Workday, to solve business problems through a requirements-centric lens. For us, this means **aligning what we do with our customer's journey to *better*** – a *better* PeopleSoft, *better* Workday, *better* infrastructure (AWS), and *better* beyond (Workday Extend, Artificial Intelligence / Machine Learning, etc.).

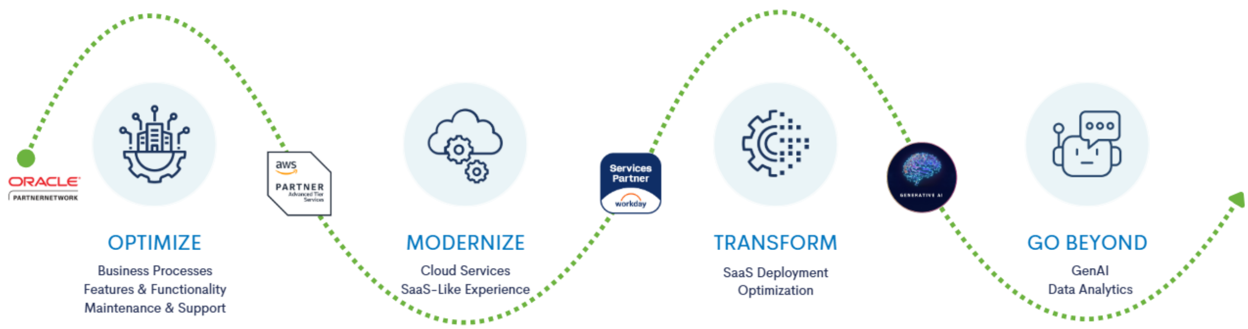


Figure 1 How we align with the customer journey

That is our philosophy and our approach to each client because *better* is an ever-evolving, subjective term with a journey that can be non-linear, as it is based on each customer's unique needs. Our approach to meeting those needs and solving business problems is rooted in flexibility, tailoring solutions, and leveraging deep knowledge and experience to ensure excellent service delivery.

Core Business Lines ERPA is an Amazon Web Services (AWS) Advanced Consulting Partner (Oracle Services Competency, Education Services Competency), Oracle Partner Network partner, and Workday Service Partner (Extend certified) with practices dedicated to each industry partner.

Figure 2 ERPA is a certified partner across Workday, AWS, and Oracle (PeopleSoft)

We have over 400 employees serving our customers within and/or across Workday, PeopleSoft, and AWS as well as a strategic resourcing practice that sources highly specialized skillsets and offers contract consulting specifically to third parties and end customers.

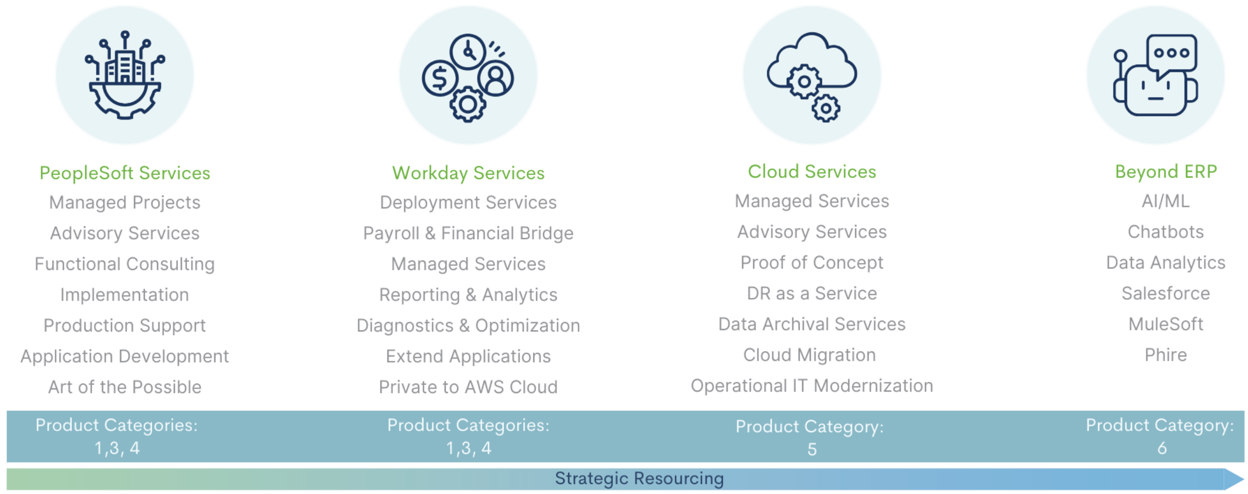


Figure 3 ERPA's High-Level Services Mapped to NCTCOG Categories

Our PeopleSoft, Workday, and AWS practices focus on implementing, optimizing, modernizing, and supporting enterprise applications like Peoplesoft and Workday, through three (3) key service areas:

- **Application Management Services.** ERPA provides comprehensive application management services to ensure optimal operations of PeopleSoft, Workday, and AWS infrastructure. These managed services vary based on the application but aim to meet business needs through ensured stability, improved efficiency, security, reliability, and reduced operational costs, and are backed by a Service Level Agreement (SLA).
- **Deployment & Professional Services.** ERPA provides a full range of consulting services to address business challenges and continuous improvement for PeopleSoft and Workday systems. This includes implementation services, business process optimization, functional services, workshops, project management, etc.
- **Strategic Resourcing & Staff Augmentation.** ERPA resource and staffing services provide the expertise needed to execute day-to-day operations and/or special projects. ERPA has over 300 W-2 consultants who specialize in Workday and PeopleSoft, and a network of nearly 2,000 fully vetted independent contractors with the diversification of skills and experience to address even the most unique of requirements. These resources reside outside of but can provide support for the core Workday, PeopleSoft, and AWS practices described earlier.

Our customers and industry partners, alike, come to ERPA to solve business problems due to our uniquely positioned journey-focused services, experience, expertise, and institutionalized knowledge. We collaborate with customers, industry partners, and internal partners within and across our business practices to share knowledge and develop creative solutions. A few examples are:

- ERPA has the proud distinction of being the first Workday AMS partner to also be Workday Extend certified. Our team expertly develops Extend applications providing repeatable and scalable solutions and functionality.
- Artificial Intelligence and Machine Learning (AI/ML) is a key focus area and we have worked closely with AWS, Workday, and our customers to identify use cases and solutions.
- Our Workday and Cloud practices continue to collaborate on how to drive innovation for Workday on AWS including data archival and retention to meet compliance needs. Because of our relationship with Workday and our extensive AWS certifications, we have been selected as one (1) of only six (6) recommended Workday partners for migrating client Workday tenants from the private cloud to the public cloud.

- We developed ActiveGenie™, an AWS Qualified Software and proprietary cloud orchestration service, rooted in DevOps and API-driven methodologies for the deployment and management of Oracle/PeopleSoft workloads using repeatable, scalable, and automated processes that we are actively exploring how to extend to other enterprise applications as organizations shift from data center hosting.

Major Requirements that Cannot be Met. With the exception of Project Category 2, ERPA has the experience and resources to respond to all categories and their associated scopes of work. ERPA does not perform software selection services and support.

4.1 ROBUST PEOPLESOFT PRACTICE

ERPA is one of the largest PeopleSoft consulting firms focused on public sector organizations and higher education. ERPA has over 250 U.S. based employee consultants dedicated to technical and functional PeopleSoft services and support and average 12 years of experience.

ERPA's PeopleSoft practice services a diverse range of clients. Examples include:

- AARP
- AccelerEd/UMCG Ventures
- Alabama State University
- City of Boston (*since 2013*)
- City of Chesapeake
- City of Raleigh (*since 2015*)
- City of Seattle
- City of Springfield (OR)
- CorVel Corp
- Daytona State College
- Florida State College at Jacksonville
- Illinois State University
- Jefferson County School District
- Lane County (OR)
- Lone Star College
- Lower Colorado River Authority
- Office of the Attorney General (TX)
- Papa John's (*since 2014*)
- Southern Ute Indian Tribe
- U.S. Merchant Marine Academy
- University of California – Santa Barbara
- Universal Technical Institute
- University of Texas System
- University of Wisconsin System

We are committed to supporting the PeopleSoft platform and continue to invest in PeopleSoft solutions and support for PeopleSoft clients who want to take advantage of Oracle's commitment to support and enhance PeopleSoft as well as those preparing for a SaaS solution deployment such as Workday.

Functional optimization is another focus area of ERPA. This practice area allows PeopleSoft clients to utilize the solution optimally to maximize investment in the platform and to drive greater alignment between the business goals and requirements and the capabilities of the PeopleSoft systems.

For us, full service also includes unique services that target cumbersome processes and drive efficiencies throughout the lifecycle of software ownership. Some of these include scripted, automated testing using PeopleSoft Test Framework (PTF) supplemented by a proprietary tool, Testing Automation Platform (TAP) that addresses automation across the individual tests and provides reporting and dashboards to evaluate results.

Because a better PeopleSoft is a subjective, moving concept, ERPA offers value-added options and thought leadership to guide clients on their journey. We have listed a few below. While these are not included in our response, they are for NCTCOG's consideration to achieve a better PeopleSoft.

Art of the Possible (AoTP). ERPA's AoTP program is about unleashing a better PeopleSoft by maximizing the robust capabilities and functionalities innate within the PeopleSoft system our clients own. After performing a requirements-centric assessment that takes a holistic look at your current business processes, noted pain points, and ideal state, ERPA offers interactive educational sessions and demonstrations targeting areas where an organization is either not utilizing or under-utilizing PeopleSoft.

From there, we present our recommendations and work with an organization's team to establish a roadmap outlining when and how to implement the desired key improvements.

The roadmap process, itself, is focused on how to bring resources to bear to address the most pressing issues immediately with others to be addressed through continuous improvement. Introducing a continuous improvement model after addressing immediate issues has a pronounced impact on the organization and ensures that the system doesn't fall behind as the software and business processes change in the future.

Automated Testing Services. ERPA provides automated testing services and support utilizing PeopleSoft Test Framework (PTF). ERPA's accelerator, TAP (Testing Automation Platform), addresses gaps in the delivered PTF tools and provides robust automation of testing PeopleSoft applications by providing an intuitive user interface with the ability to execute scripts across end-to-end scenarios. TAP provides dashboards with drill-down capabilities to provide summary and detailed views of test results. Also, TAP allows scripts to be exported in MS Excel format, which can be used for manual testing efforts and to assist in creating job aids and other training materials. TAP is developed using PeopleTools and works in concert with PTF.

Limitations of PTF	TAP Enhancements
Highly Technical by Nature User training on the tool is required to understand PTF concepts and layout, to modify existing tests, and to execute tests.	**Minimized Learning Curve** TAP offers users a familiar PeopleSoft interface to modify existing test scripts and execute test scripts.
Cumbersome Test Log Review PTF generates technical, XML-based test logs that users must spend time reviewing to understand test results for each test script.	**Streamlined Test Validation** TAP's Test Cycle Reports feature overall status, module level and script level details and screenshots that can be downloaded and archived.
Manual Status Reporting Requires Testing Managers/Leads to spend time compiling key testing data for their daily/weekly status meetings.	**Makes Your Job Easier** TAP's Reporting Dashboards are user-friendly with dynamic real-time status of individual test cases with drill-down capabilities.

Figure 4 ERPA's TAP

Most recently, ERPA leveraged TAP to automate and streamline the most frequently tested functionalities across all PeopleSoft pillars for Northwestern University. ERPA worked closely with University subject matter experts to understand the specific needs and deliver complex automated test scripts for the wide-ranging functionalities. We also provided Northwestern with a customized test strategy, methodology, and test plans that are solidly based on sound QA principles. Northwestern now has a much more efficient testing system with 262 individual tests and shell tests as delivered by ERPA. Further, TAP has reduced the time spent on testing by the Northwestern team by over 70%.

Rapid Fluid Deployment. ERPA rapid Fluid deployment utilizes pre-built analytical dashboards and homepages for employees, managers, and administrative staff for all PeopleSoft pillars (HCM, FSCM, ELM, and Campus Solutions). Our team first performs an application and user assessment with the client, then configures dashboards and homepages, provides training material, and supports the rollout. We have successfully rolled out Fluid for clients like AARP, City of Raleigh, and Lower Colorado River Authority.

Center of Excellence – ERPA's Dedicated PeopleSoft Experts. Within ERPA's employees is the Center of Excellence (COE) team. ERPA's commitment to client-focused, flexible, and expert Oracle/PeopleSoft support is highlighted by significant investment in this organization. The COE team has a low turnover rate (less than six percent) and includes approximately 90 highly skilled experts dedicated to delivering technical, functional, and cloud-based services for PeopleSoft. This includes PeopleSoft Administrators, Database Administrators, PeopleSoft Developers, Functional Consultants, Techno-Functional Consultants, and certified Cloud Engineers (80% of which are PeopleSoft Administrators or DBAs by trade).

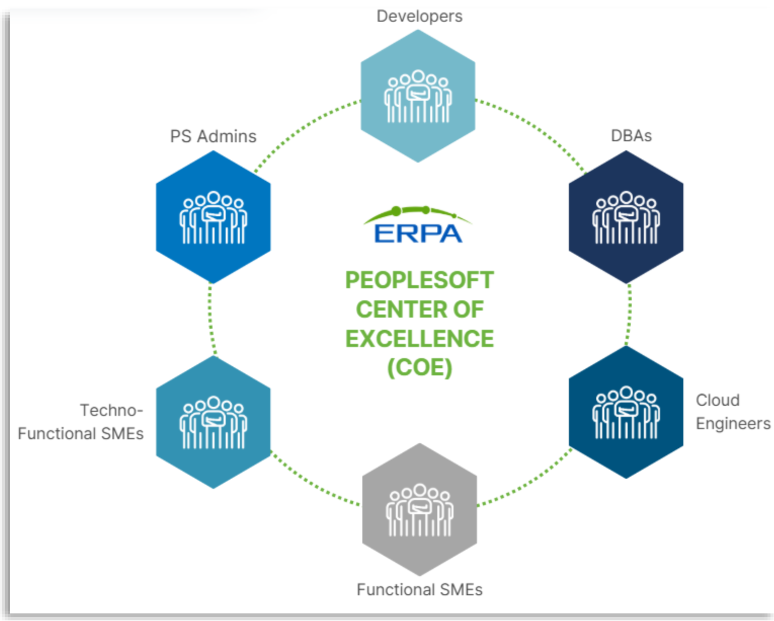


Figure 5 ERPA's PeopleSoft Center of Excellence

4.2 THRIVING CLOUD PRACTICE

ERPA's Cloud Practice is fully committed to AWS as our cloud provider of choice. ERPA aligns with AWS' best practices and customer-obsessed culture, and we continue to innovate for PeopleSoft and other workloads on AWS. Eighty percent (80%) of our AWS experts have PeopleSoft experience which directly translates into innovative solutions and a deeper understanding of business problems. One such innovation is ActiveGenie™.

Powered by ActiveGenie™. ERPA developed and utilizes our AWS Qualified Software, ActiveGenie™, a proprietary cloud orchestration service driven by extensive automation and DevOps methodologies for efficient cloud migration, infrastructure management, and application management. ActiveGenie™ is a key reason the City of Boston selected ERPA to deliver their cloud modernization effort, and why we were able to migrate Daytona State College's student information system (PeopleSoft Campus Solutions) in 14 days.

ActiveGenie™ simplifies and seamlessly automates cloud migration tasks like environment builds, using repeatable, scalable processes that compress migration timelines and minimize service disruption by eliminating manual errors and allowing for multiple iterations.

ActiveGenie™ improves the serviceability of AWS cloud-hosted enterprise PeopleSoft environments by reducing the time to perform typical maintenance activities like software upgrades and patching from days to minutes through automation. ActiveGenie™ is architected to simplify and maximize the dynamic allocation and scalability of on-demand and scheduled resource provisioning while controlling costs, maintaining quality, and enhancing reliability and efficiency.

ActiveGenie™ includes the ability to view cloud infrastructure and Peoplesoft environment health, performance, and service requests in a centralized portal. ActiveGenie™ provides the ability to create additional environments, refresh non-production environments as well as several routine administrative functions such as starting/stopping environments, clearing cache, and bouncing the servers. It also enables configuring log retention, backup policies, and maintenance window schedules. To ensure application integrity and reliability, the PeopleSoft infrastructure is preserved as a code in a version-control system to enable replication of any desired state at any time.

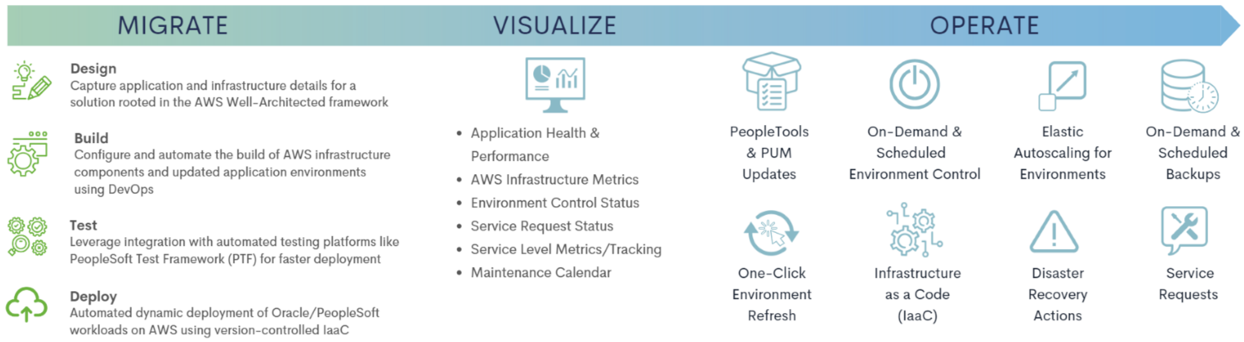


Figure 6 ActiveGenie™ - Key Features

The inherent proactive monitoring keeps both ERPA and customer staff informed and ensures minimal disruption to the user community. ActiveGenie™ offers real-time metrics of enterprise applications and AWS infrastructure as part of the overall health and performance view. ActiveGenie™ integrates critical tools and technologies such as Amazon EC2, Amazon CloudWatch, Amazon CloudTrail, Amazon S3, Glacier, Terraform, Git, Grafana, Oracle Enterprise Manager, RDS Performance Insights, etc. to provide an intuitive dashboard view and robust proactive solution for optimal PeopleSoft performance.

ActiveGenie™ is a key way in which ERPA differentiates itself in the market, providing added value to our customers through accelerated AWS cloud migrations, streamlined and consolidated dashboards, and automation for enhanced efficiency of PeopleSoft operations.

4.3 GROWING WORKDAY PRACTICE

ERPA's Workday Practice was built around the idea of providing a new way to partner with Workday customers before and after they go live – a new way to help them achieve a *better* Workday.

Our Workday Practice comprises nearly 100 employees and some of the most experienced certified Workday leads and specialists in the Workday ecosystem. Our teams' certifications span all Workday solutions including HCM, Payroll, Financials, Student, Adaptive Planning, Integrations, Prism, Reporting, and Extend. ERPA consultants' experience and certification cover every module within the Workday product landscape.

ERPA can support any Workday needs of NCTCOG or Participating Entities through our Workday practice with resources that have:

- An average of 7.5 years of Workday experience
- An average of 4.4 Workday certifications per resource
- Performed an average of 20+ end-to-end implementations
- A blend of customer and consultant Workday implementation experience
- Served as functional architects and product leads across Workday's platform with experience leading business process framework, change management efforts, training, adoption planning, and industry best practices
- Understanding needs and considerations unique to the customer and respective industry, including government agencies, and other public sector organizations
- Extensive experience building custom reports including Prism, Matrix, Advanced, Composite, Search, Discovery Boards, Scorecards, and Custom Dashboards.

- Extensive experience in analyzing business rules and conducting gap analysis, design, configuration, partnering with developers, business process review and reengineering, training, and plan testing
- Independent Partner Program (IPP) and IPP Plus (IPP/+) are two programs comprised of highly vetted Workday consultants available for special projects or surge support.

Examples of Workday customers include:

- City of Vancouver (WA)
- Weld County (CO)
- Texas State Technical College
- Kansas City University
- Urban Institute
- PF Chang's
- Cracker Barrel
- Samuel Merritt University
- Dunwoody College of Technology
- Sema4/Gene DX
- Language Line
- Mercy Health
- Mountain America Credit Union
- Twitter/X

Workday Deployment & AMS Support. As a Workday Services Partner, ERPA facilitates business transformation via deploying Workday's SaaS solution as well as providing post-deployment stabilization, optimization, configuration, and roadmapping support. This includes guiding customers through Workday's planned update releases. As part of our ongoing partnership with NCTCOG and Participating Entities, ERPA will provide the tools to assess upcoming features and establish a roadmap identifying the best timing to enable new features within the customer's Workday tenant, and to align to the best path forward on these new features and jointly determine who, when, and what features will be implemented and tested in the customer's tenant.

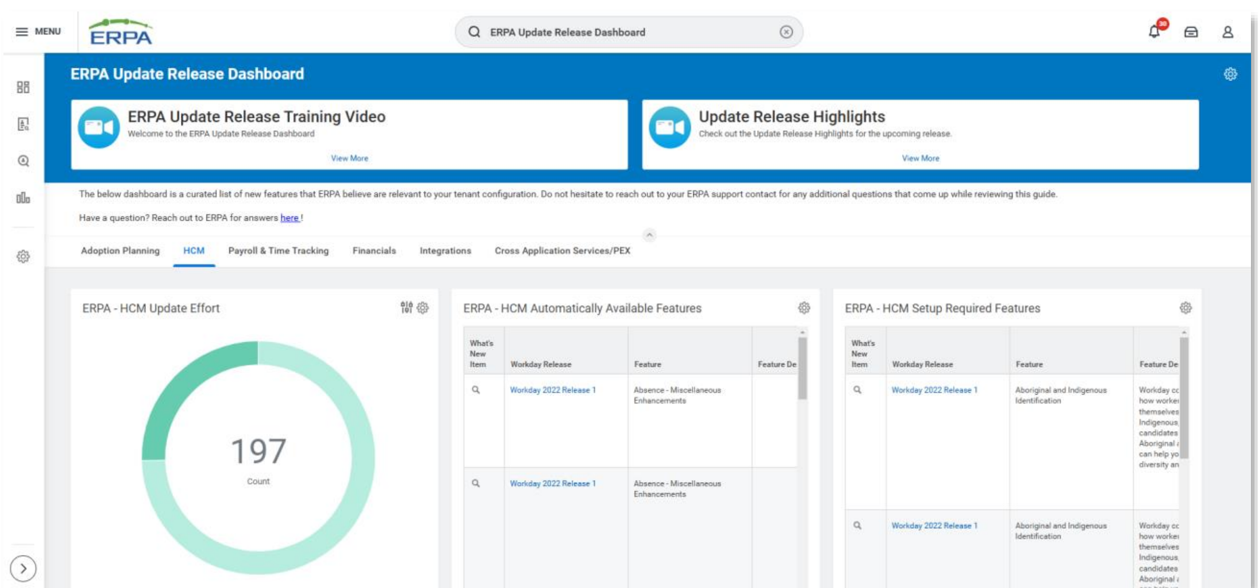


Figure 7 ERPA Update Release Dashboard

ERPA's Workday practice takes a strategic approach to post-production AMS support to provide a better return on investment. We package AMS services based on the most requested post-implementation support needs and provide a named resource support team to proactively support and adapt to each organization's unique requirements.

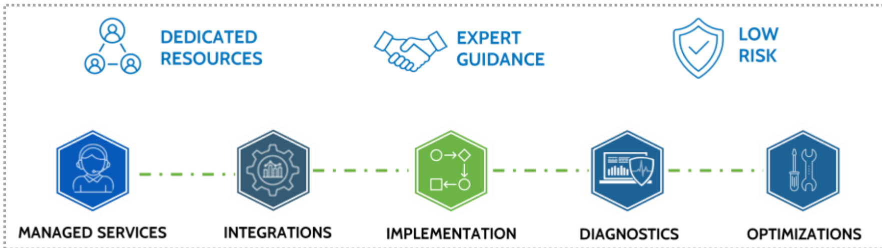


Figure 8 ERPA's Core AMS Offerings

Managed Services. Support team, go-live stabilization, cyclical event preparation, release management, assessments, and diagnostics through tiered service levels to meet the distinct needs of each client.

- **Go-Live Stabilization.** End-to-end support of configurations and integrations to account for issue triage and troubleshooting.
- **Support Team.** Production configuration, integration, and business process maintenance and repairs; report and dashboard updates and development, security updates, and skills and knowledge transfer.
- **Cyclical Event Preparation.** Event preparation to support our customers throughout the calendar year, including open enrollment, ACA, annual compensation reviews, performance reviews, and more.
- **Advisory Services.** Strategic roadmap assessment and planning, guiding principles, critical use cases, change management, and training services.

Integrations. Integration managed services, integration builds, and integration assessments with integration assurances, which include warrantied work and unlimited break-fixes of existing integrations. ERPA is the only Workday partner in the ecosystem to provide a warranty on integrations. This means there is no additional cost for bug fixes or issues from the integration build. We also provide a warranty on previously built Workday integrations that pass our assessment if a support contract with ERPA is in place.

Diagnostics. A thorough review and assessment of selected workstream(s), and an assurance diagnostic report with recommendations for benchmarks and optimization.

Optimizations. Diagnostics, business process review, tailored documentation, deliverable prioritization, and future state planning.

ERPA offers AMS services based on the most common post-implementation support needs requested throughout our team's collective experience. Our offering includes baseline services that we customize to meet client needs such as monthly support hours which can be used across all AMS services described.

	FEATURES	ENHANCED	ELEVATED	EVOLVED
ERPA WORKDAY AMS	Engagement Manager	✓	✓	✓
	Named Resources	✓	✓	✓
	Defined Support Hours	✓	✓	✓
	Office Hours	✓	✓	✓
	Workday Update Support	✓	✓	✓
	Reporting Assessment	✓	✓	✓
	Monthly Status Reporting	✓	✓	✓
	Module Diagnostic(s)		✓	✓
	Report Training			✓
	Full Tenant Diagnostic			✓

Figure 9 ERPA Workday AMS Support Packages

Workday Extend. We were the first Workday AMS partner to also be Workday Extend certified. This vote of confidence from Workday is the result of quality support, breadth of knowledge, and commitment to client partnership/solutioning that our Workday practice team and leadership have demonstrated.

Our Workday Extend team is focused on working with customers to develop Extend applications that are repeatable and scalable to solve common, industry-specific business problems and supplement delivered Workday functionality. Consider the following:

- ERPA is developing Extend applications for Kansas City University and a private law firm to support custom forms, data fields, and business processes around supplier contracts and payroll audit, respectively.
- Our team is currently engaged in a project with a large beverage wholesaler to develop an Extend application that integrates Workday and Broadspire for incident reports associated with their warehouses.
- ERPA successfully launched an Extend application for Workday Student, working directly with Workday in partnership with Tallahassee Community College to finalize the development of our student roster and attendance tracking app.
- Workday engages ERPA and our Extend team to solve commonly noted business problems and product opportunities – one of which includes the need to address compliance regarding state mandated reporting.

If applicable, identify any subcontractors or third-party services that are utilized in the performance of fulfilling this RFP. Provide a general explanation and chart which specifies project leadership and reporting responsibilities, and how the team will interface with NCTCOG and Participating Entities' project management and team personnel.

As an Amazon Web Services (AWS) Advanced Consulting Partner (Oracle Services Competency, Education Services Competency, Modernization & Migration Services Competency), Oracle Partner Network partner, and Workday Services Partner (Built on Workday) with practices dedicated to each industry partner, ERPA will leverage these partnerships to assist NCTCOG and Participating Entities in achieving desired outcomes.

ERPA will not subcontract any portion of the work to third-party vendors, however, as is common industry practice, we do engage the services of individual independent contractors to supplement our staff at times. These resources provide services in the same capacity as permanent ERPA employees. From NCTCOG and Participating Entities' perspective, independent contractors and permanent employees are indistinguishable.

5. TAB E: TECHNICAL PROPOSAL

This section should constitute the major portion of the submittal. Respondent's proposal should detail their capabilities, knowledge and skills related to the desired deliverables and expectations as outlined in Section 5.0: Specifications and Exhibit A.

Included within this section is ERPA's response to the scope of work outlined within Section 5.0 of the RFP. Also included in this section is ERPA's response to Exhibit A and Exhibit B questions (excluding pricing).

5.1 CHALLENGE OBJECTIVES [EXHIBIT A: DESCRIPTION OF DESIRED PRODUCT CATEGORIES FOR PROPOSED PRICING]

The following list of project deliverables are anticipated by TXShare Entities leveraging a contract resultant of this RFP.

In addition to the narratives desired regarding your firm's capability to provide Product Categories 1-5, and the Primary Components/Other Features of an ERP, Respondents are invited to propose solutions that address the following operational challenges, including but not limited to:

- *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?*

Legacy Systems Modernization. Our diverse customer base inclusive of government, higher education, and the commercial sector benefits from ERPA's advisory and assessment services to identify best option(s) such as:

- AWS cloud migration of PeopleSoft for a SaaS-like experience to leverage Oracle's 10-year commitment to support and enhancements
- Utilizing AWS to pave a path to Workday (or other SaaS solution) by offloading all infrastructure and support
- Net new Workday deployment
- PeopleSoft re-implementation services with full functional redesign

Managed Services for PeopleSoft. ERPA delivers Managed Services for PeopleSoft to clients like the City of Boston, the City of Raleigh, the City of Springfield, Lane County, Lower Colorado River Authority, CorVel Corp, Papa Johns, Daytona State College, and Alabama State University, across a variety of hosting platforms, ranging from on-premise to third-party cloud providers. For example, we have supported Papa John's PeopleSoft systems for over a decade, during which they hosted the applications in an on-premise data center and later Google Cloud Platform (GCP). To this end, we are platform agnostic.

ERPA has baseline offerings that we will tailor to each organization's unique post-production needs. We are flexible and have developed these packages based on the common needs across our higher education and public sector customers. We have provided maintenance and support for customers for over 25 years. All services include engagement management, incident management, and SLAs.

Our services are described below. We leverage ActiveGenie™ automation for application and infrastructure management when PeopleSoft is hosted on AWS; otherwise the infrastructure category will not apply.

	SERVICES	INFRA+	MAINTAIN+	ENHANCE+
AWS Cloud Infrastructure Support	Infrastructure Management	☁	☁	☁
	Infrastructure Maintenance	☁	☁	☁
	Security & Compliance	☁	☁	☁
	Performance Monitoring	☁	☁	☁
	Optimization & Capacity Planning	☁	☁	☁
	Provisioning & Automation	☁	☁	☁
	Availability & Disaster Recovery	☁	☁	☁
PeopleSoft Administration & Maintenance Support	Installation, Configuration & Management		☁	☁
	Environment Backups & Refreshes		☁	☁
	Performance & Availability Monitoring		☁	☁
	Code Migration		☁	☁
	PUM Updates		☁	☁
	Regulatory Updates		☁	☁
	Critical Patch Updates		☁	☁
	PeopleTools Patching		☁	☁
	PeopleTools Upgrade		☁	☁
Database Administration & Maintenance Support	Installation, Configuration & Management		☁	☁
	Performance Monitoring		☁	☁
	Capacity Planning		☁	☁
	Data Backup & Restore		☁	☁
PeopleSoft Development Support	Break-Fix Support			☁
	Integration Development & Maintenance			☁
	Batch Job Monitoring			☁
	Report & Query Development			☁
PeopleSoft Functional Support	Functional Configuration			☁
	New Feature & Functionality Demonstration			☁
	End User Support			☁

Figure 10 PeopleSoft & AWS Managed Services/Maintenance/Support

Decustomization for PeopleSoft. ERPA follows and promotes the best practice of no (or minimal) customizations to minimize the technical debt of PeopleSoft applications. ERPA uses a process that is "requirements-centric". In practice, this means the focus is on the business outcome expected, not on the software itself. This facilitates the process of solving the business problem with delivered software. Where the software doesn't appear to meet the business need, ERPA takes the following steps before introducing customization:

1. Validate the requirement. ERPA will push back on the requirement in detail to ensure that the requirement is valid and well understood. The goal is to determine if greater specification allows for other avenues for a solution that can be achieved without customization.
2. If the requirement is valid and a gap still exists, ERPA will look for opportunities to address the issue through business process change or other external options (e.g., a third-party solution).
3. If a business process or other external options don't exist, ERPA will identify a customization to be implemented to meet the business requirement.

This three-step evaluation process has proven to be highly effective in addressing business requirements in a way that eliminates (or minimizes) customizations. We have deployed a similar evaluation process for clients to eliminate existing customizations that begins with evaluating each customization to understand the driving business requirement, then following through the evaluation steps.

Art of the Possible. Functional optimization is another focus area of ERPA for customers who are committed to the Oracle/PeopleSoft platform. This allows PeopleSoft clients to maximize their investment in the platform and to drive greater alignment between the business goals and requirements and the capabilities of the PeopleSoft systems.

We have developed a program called "**Art of the Possible**" (AoTP) that is used with clients to perform analysis of existing PeopleSoft deployments to provide feedback and direction on how best to utilize the PeopleSoft system. In line with most customers' direction and best practice, this program is highly biased toward maximizing the delivered, unmodified functionality of PeopleSoft. The overarching goal of AoTP is to assist organizations in maximizing the utility of the software already owned by the client through proper use, automation, and efficient business process adoption.

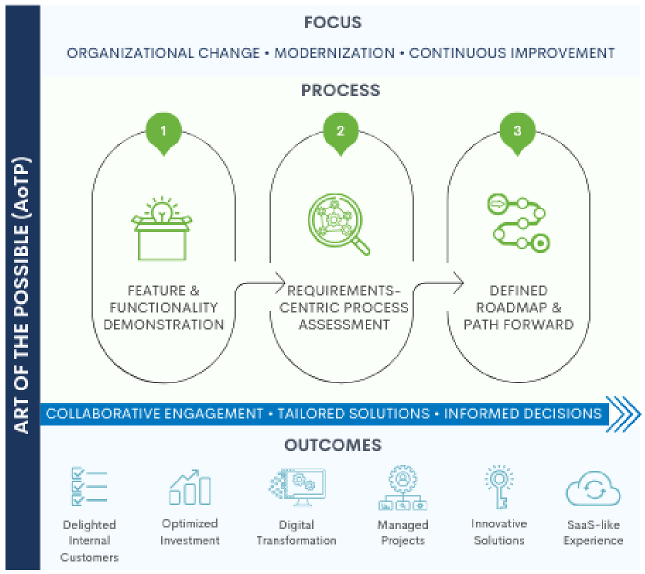


Figure 11 Art of the Possible for PeopleSoft

An example of applying the AoTP is a recent engagement with Alabama State University (ASU), to find practical ways to assist that organization in meeting the needs of its students and faculty by utilizing the innate functionalities within its PeopleSoft HCM, Finance, and Campus Solutions software. The approach included: educational sessions through demonstrations of the capabilities of the tools already owned; followed by an assessment of how the organization is currently utilizing (or not) those tools toward the mission of the organization, and lastly, defining a roadmap for moving the organization forward to solve those business needs – within their financial constraints.

The roadmap process is focused on how to bring resources to bear to address the most pressing issues immediately with others to be addressed through continuous improvement. Introducing a continuous improvement model after addressing immediate issues has a pronounced impact on the organization and ensures that the system doesn't fall behind as the software and business processes change in the future.

An AoTP engagement includes artifacts such as Current State and Future State options along with a recommended roadmap to facilitate decision-making and planning for the best path forward. As noted, ERPA's approach is budget-conscious and cost-efficient, providing a timeline that allows for the unique financial and operational environment of the organization.

Common recommendations also include leveraging the Fluid user interface, WorkCenters, Kibana visualization, and more.

- *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?*

Managed Services. As noted earlier, our Managed Services – whether PeopleSoft is hosted on premise or in the cloud – ensure the applications are secure, updated, and running optimally. We provide ongoing proactive and collaborative support, serving as an extension of client teams, to provide freedom from mundane maintenance activities, and ensure consistent staffing levels.

Migrate to Modernize Legacy Systems + Managed Services. Key to a successful PeopleSoft cloud deployment is ERPA's *migrate-to-modernize* approach, and not just a *lift & shift*. This ensures the AWS solution is designed with a dynamic infrastructure and cloud-native architecture, leaving behind the traditional focus on hardware capacity, maintenance, and refresh. This is why we developed our proprietary cloud orchestration service, ActiveGenie™, which is rooted in DevOps and API-driven methodologies for the deployment of Oracle/PeopleSoft workloads using repeatable, scalable, automated processes. Part of our migration methodology is ensuring fully compliant versions across the application, PeopleTools, and underlying technologies (e.g., WebLogic, Tuxedo), database, and operating system. This is the first layer for ensuring operational resilience.

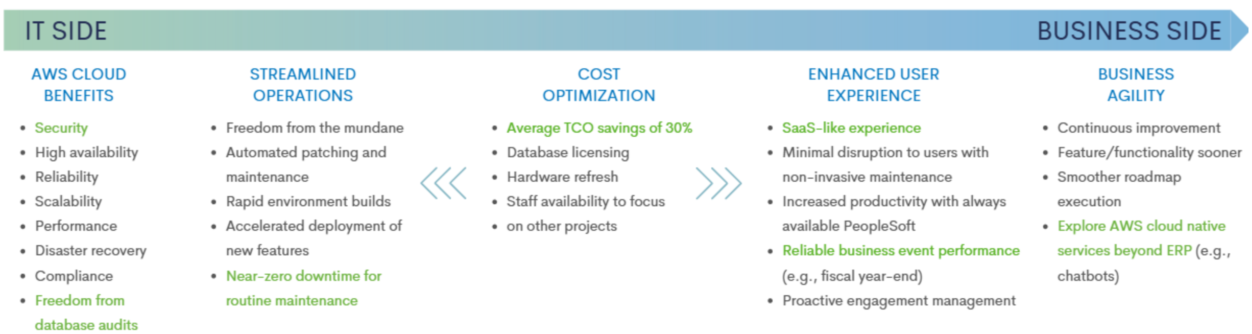


Figure 12 What to Expect When You Migrate to Modernize

One such example is the City of Boston. With nearly 20,000 PeopleSoft users the City required a cloud - based solution for its PeopleSoft applications which had been running on an outdated mainframe and DB2 databases. ERPA migrated the City to AWS providing a SaaS-like experience powered by ActiveGenie™ with SLAs, automation where possible, a complete disaster recovery solution, up-to-date applications for accelerated new feature adoption, and a nearly 50% reduction in their total cost of ownership.

Path to SaaS Through AWS. ERPA leverages AWS in two key ways – *migrate to modernize* and *migrate to manage*. First, to modernize legacy systems like PeopleSoft as detailed previously. The second way is by utilizing AWS to optimize costs associated with application management and operations while gaining the benefits of cloud such as security, reliability, and performance as organizations begin the process of navigating their next generation software journey. This approach affords NCTCOG and Participating Entities the ability to explore, procure, and deploy SaaS solutions like Workday with peace of mind that current systems are running optimally. Additionally, our customers routinely reduce their annual total cost of ownership of running and maintaining PeopleSoft by up to 30%. These savings can help fund the SaaS implementation when the time is right.

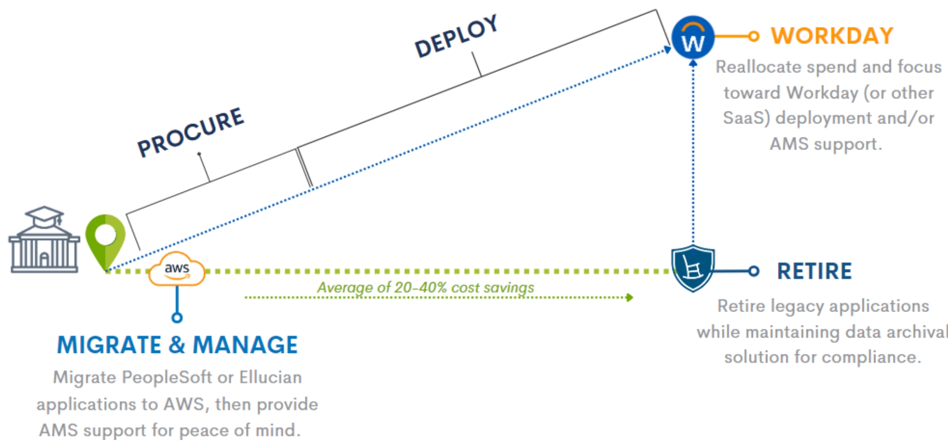


Figure 13 Path to SaaS Through AWS

For example, ERPA hosts, manages, and maintains the University of California – Santa Barbara's PeopleSoft Finance application while they are deploying a SaaS solution. This allows their teams to focus on a smooth deployment. For customers considering, planning, or currently deploying Workday, we offer a unique value proposition wherein we build spend and/or savings reallocation to help fund the deployment and/or AMS support.

Private to Public Cloud for Workday. Because of our relationship with Workday and our extensive AWS certifications, we have been selected as one (1) of six (6) recommended Workday partners for migrating client Workday tenants from the private cloud to the public cloud. In fact, we migrated our own Workday tenant to AWS over a weekend in October 2023. Shortly after, the private cloud experienced a service disruption that did not impact ERPA.

Migrating Workday applications from the private cloud to AWS public cloud offers the highest levels of infrastructure performance, security, scalability, and key benefits that organizations will realize quickly such as zero down time patching, enhanced compliance with data and regulatory requirements, ensured availability during regional maintenance windows, and the ability to accelerate innovation with AWS native services for AI/ML.

Staff Augmentation. ERPA maintains a robust network of qualified, previously vetted consultants that can be placed client-side or consultant-side to meet client needs. This includes across PeopleSoft, Workday, Cloud, and ancillary technologies such as Salesforce, MuleSoft, etc. In fact, we have a dedicated staffing practice for PeopleSoft, as the retiring workforce for these specialists is growing.

We take this opportunity to note that Workday is very strict on staffing. As such, we maintain a bench of Workday consultants, our Independent Partner Program (IPP/+), that we can utilize for surge support on Managed Services/AMS engagements as well as for projects and client-side staffing needs. These are highly vetted candidates, 90% of which are referrals from ERPA's Workday consultant employees who can attest to their quality of work, expertise, and experience. IPP/+consultants undergo a rigorous screening process to ensure they are both qualified professionally and a cultural fit for ERPA. We pride ourselves on the depth and breadth of experience of our employees and IPP/+ consultants alike, as we choose not to use ERPA as a training ground for newer consultants in the Workday ecosystem.

IPP/+ is the collective term for two (2) programs with clear distinction.

- IPP Plus comprises a bench of certified Workday consultants who have placed their certifications with ERPA, which allows us to deploy them on projects that require implementer access as well as client-side projects that do not.

- IPP comprises a bench of Workday Consultants who have worked for another partner in the past and are now independent. ERPA does not hold their certifications, therefore, they can only perform client-side work that does not require implementer access. Most of these consultants still hold valid Workday certifications while some have allowed them to expire.

- *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.?*

In working with customers, ERPA often comes across comments about interfaces and their impact on systems. We take the position that interfaces *are* the system. Everyone knows that the two predominant paths for deploying systems are a single unified system or best in breed. In the first, interfaces are largely a non-issue. The challenges are mainly ensuring business processes match the business and drives the right outcomes. With best-of-breed, the challenge is the same but is exacerbated by integrations. In either case, the user experience should be that of a single large system. ERPA excels at this by focusing on the user experience and then driving technical solutions that make distinctions across systems invisible. This means eliminating dual entry and all the associated reconciliations.

- *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 configuration approval rules that significantly strengthen financial controls?*

ERPA is a SOC 2 compliant and ISO 27001 certified organization. To this end, we focus our internal security practices around system auditing, secure communication, identification and authentication, non-repudiation, trusted path, trusted channel, and data separation requirements. Our customers range from federal (e.g., U.S. Merchant Marine Academy) and state and local government agencies (e.g., State of Ohio, City of Boston) to higher education institutions, systems, and districts (e.g., Los Angeles Community College District, Illinois State University, Texas State Technical College, University of Texas System), all of which require strict data security in compliance with security frameworks (e.g., NIST) to protect Personally Identifiable Information (PII) and Controlled Unclassified Information (CUI).

For example, the U.S Merchant Marine Academy requires FedRamp compliance and ERPA was required to undergo (and subsequently achieved) the Authorization to Operate (ATO – Moderate) process which is focused on minimizing and managing risk responsibility. This process mostly comes from the Federal Information Security Management Act (FISMA). FISMA is an effort to standardize and consolidate security review and reporting across agencies.

ERPA follows security best practices based on the prescriptive guidance as provided by our industry partners (Oracle/PeopleSoft, Workday, AWS), which we augment with our deep experience and expertise working with public sector clients and industries with extensive compliance and security needs (e.g., biotechnology, financial services, etc.). This includes the use of role-based security, segregation of duties, and other key access controls. We will work with NCTCOG and Participating Entities to understand security policies and mandates that must be followed and account for them in our service delivery.

- *What recommend 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?*

As mentioned previously ERPA's focus on implementing, optimizing, modernizing, and supporting critical enterprise applications like PeopleSoft and Workday, is to solve business problems through a requirements-centric lens. We work with our clients, performing detailed requirements gathering and discovery, and analysis to improve process efficiency by aligning the robust, fully integrated financial systems represented within each ERP system to their business processes. The multifunctionality within each of these ERP systems allows for secure approval flows and easy processing of data across financials, inventory, and assets. As well, ERPA's team coordinates with stakeholders to create custom reports and dashboards that will allow for real-time reporting and visibility across the financial transaction.

- *What services can your firm provide for better tracking and management of the projects and assets?*

ERPA consultants leverage best practices and provide expertise in project costing and asset management. Both PeopleSoft and Workday offer fully developed asset management systems with capabilities for integrating with a client's entire financial system. We work with customers to understand current pain points and areas for improvement to develop recommendations and solutions.

- *How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?*

Achieving process standardization based on best practices through the implementation of a unified technology platform involves aligning business processes, technology, and industry standards to drive efficiency, compliance, and scalability.

This is achieved through centralized and standardized business processes, automation and workflow optimization, data consistency and real-time analytics, compliance and regulatory alignment, and scalability and adaptability. These are core to the Workday deployment methodology, which achieves consistency and efficiency through the integrated nature of the platform.

- *What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;*

As a best practice, ERPA focuses on leveraging delivered functionality, this would include the powerful and flexible workflow technology available within PeopleSoft and Workday. Our consultants can configure workflows to create dynamic routings, handle complex user criteria, route escalations, and delegate day-to-day approval needs. By leveraging notifications and automated steps whenever possible, ERPA excels at partnering with our clients to develop the tools and refined processes needed.

Key methods include:

- **Electronic Workflow and Approval Process:** Native capabilities of PeopleSoft and Workday such as PeopleSoft Approval Framework, mobile approvals (both), and Workday notifications.
- **Document Management:** Delivered functionality and/or third-party integration options for attachments, document imaging, records management, etc.
- **Self-Service & Employee/Manager Access:** Delivered functionality for employees and managers

- *What methods could your firm provide for the capturing and production of consistent, expandable set of data;*

ERPA assists clients in implementing structured methods for ensuring data accuracy, scalability, and interoperability across systems, examples include guidance on:

- Defined data models with consistent field definitions, data types, and formats
- Implementing a data governance framework to enforce rules and policies as well as data quality tools to validate and clean data before storage
- Using ETL for automated data capture and integration
- Data standardization
- Performing a data cleansing exercise before deploying a new ERP solution

- Identifying solutions for data driven insights

- *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; and*

ERP systems like PeopleSoft and Workday include built-in GASB-compliant reporting templates that help automate financial processes, ensuring data integrity, and generating standardized reports.

From a PeopleSoft perspective, Oracle releases GASB based updates as part of PeopleSoft Upgrade Manager (PUM). Part of the managed services offered by ERPA is our assistance in monitoring, applying, and testing updates. These updates typically cover areas such as tax laws, payroll regulations, financial reporting standards, and industry-specific compliance requirements.

In the context of Workday, Workday provides all procedural functions of a fund accounting system in conformity with GAAP and GASB accounting standards. The Workday Business Process Framework (BPF) is unique and purposefully built into its core technology foundation from the beginning. Our Workday support offerings enable us to work with customers to roadmap and ensure the Workday platform meets business requirements as they evolve over time

- *How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.*

Workday offers a variety of features that help organizations ensure compliance with Section 508 of the Americans with Disabilities Act (ADA). These features include screen reader compatibility, full keyboard navigation, color contrast/customization, resizable text/layout, alternative text for images, accessible video content, access forms/input field, and more.

ERPA can provide tailored solutions and guidance to help organizations configure, customize, and use Workday in ways that maximize accessibility such as:

- Evaluation of Workday configurations
- Setting up accessibility features
- Connecting third-party tools and technologies (e.g., screen readers, speech-to-text software, or magnification tools)
- Optimizing integrations for accessibility
- Customizing Workday user interfaces for accessibility
- Creating custom dashboard & reports
- User training on accessibility features
- Real-world testing with users with disabilities & user feedback loop

Likewise, PeopleSoft offers a variety of accessibility features similar to Workday. We will leverage our 25+ years of experience to help organizations enhance these features:

- Evaluation of existing PeopleSoft configuration
- Reviewing customizations and integrations
- Enabling built-in accessibility features (e.g., screen reader compatibility, keyboard navigation, high-contrast theme)
- Optimizing standard PeopleSoft pages & templates
- Ensuring Compatibility with external tools
- Tailoring the user interface
- Designing custom dashboards & reports
- Training administrators on accessibility features
- End-User training for accessible practices

- Involving employees with disabilities in testing
- Custom development for accessibility needs

- *How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?*

Art of the Possible for PeopleSoft. Establishing an environment that promotes continuous improvement is core to ERPA's approach to each project. As such, ERPA brings value-added services such as assessment services that address security, performance, cost, and software optimization. The latter is encompassed in what ERPA calls Art of the Possible, as described earlier in this response. This collection of services is focused on ensuring that clients have a solid understanding of the capabilities of the PeopleSoft suite of software, have the opportunity to understand how their current business practices align with industry best practices, and then delivers a roadmap to move the organization forward.

After performing a requirements-centric assessment that takes a holistic look at a client's current business processes, noted pain points, and ideal state, ERPA will offer interactive educational sessions and demonstrations targeting areas where an organization is either not utilizing or under-utilizing PeopleSoft. From there, we present our recommendations and work with an organization's team to establish a roadmap outlining when and how to implement the desired key improvements.

The roadmap process, itself, is focused on how to bring resources to bear to address the most pressing issues immediately with others to be addressed through continuous improvement. Introducing a continuous improvement model after addressing immediate issues has a pronounced impact on the organization and ensures that the system doesn't fall behind as the software and business processes change in the future.

Requirements Traceability Matrix & Fit-Gap for PeopleSoft. ERPA's process is requirements centric and promotes a business process review strategy that answers the question "how can the software solve specific business needs?" and properly views the ERP software as a tool to achieve the business need. This naturally aligns the process with business and regulatory considerations.

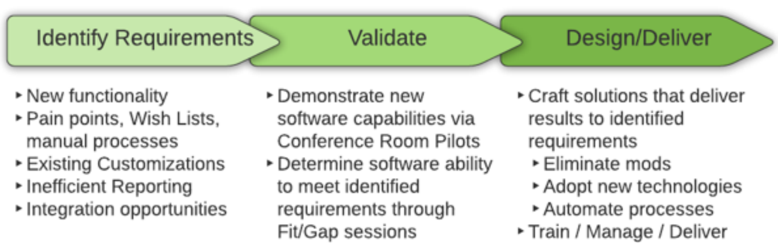


Figure 14 ERPA's Requirements Centric Process

ERPA uses a Requirements Traceability Matrix (RTM) to manage and track the items in consideration during the process. Each identified requirement is listed, and the full disposition of that requirement is captured. This includes the results of Fit/Gap evaluations, governance approval results, references to applicable documents (design/configuration, functional and technical specifications, test scripts), and test results. The RTM provides status during the process and an historical perspective at the project's completion. Capturing requirements is key and there are several methods used to ensure that the list is complete. Experience has shown that this approach is most effective at identifying the software features that need to be implemented.

Additionally, the process will surface areas where the software is misused (or used inefficiently) or is not delivering an effective solution. All incidents found will be evaluated to design and implement an effective solution using a combination of software and business process change.

Fit/Gap Sessions. Fit/Gap sessions are designed to match the identified requirements to the functionality of the system. Requirements that can be met by PeopleSoft using delivered functionality are identified as a Fit and otherwise a Gap. Gap disposition can be addressed through the elimination of the requirement, alterations of business processes, or customization.

Since, by definition, within this process, all software customizations, reports, user-identified "pain points," wish list items, and manual processes are identified as requirements, they will be subject to the Fit/Gap process for resolution. Experience has shown this "requirements-centric" approach to be highly effective at ensuring that all opportunities for improved business processes get an appropriate level of attention.

A simple example of Fit/Gap process is the identification of reporting requirements. These identified requirements are then mapped to the existing system reporting capabilities. If the requirements match the capabilities, it is a Fit, otherwise, it is labeled a Gap and is slated for analysis and disposition.

Figure 15 Fit/Gap

Finding Workday Solutions. ERPA follows Workday's prescriptive guidance and incorporates our team's collective experience implementing, optimizing, and supporting all business process configurations as shown below. We begin, first and foremost, with a discovery process that is centered on understanding customer requirements, organizational nuances, challenges, goals, and objectives before identifying solutions. We identify solutions based on a variety of factors such as the criticality of the need, ability to leverage delivered Workday functionality, and how the solution fits within the customer's roadmap, which our team will then discuss with the customer team.

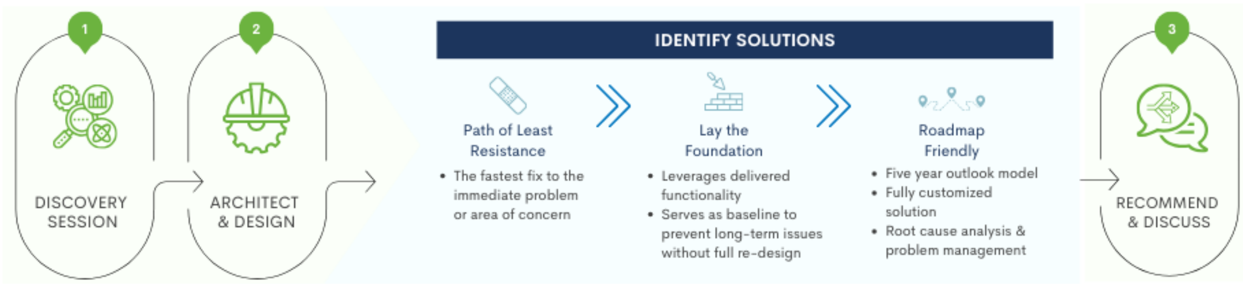


Figure 16 How ERPA develops Workday configuration solutions to problems

- *How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?*

Workday handles Time and Expenses as two different functional areas. Workday Time Tracking is capable of tracking productive and non-productive hours along with complex calculations tied to projects, shifts, and entry based on blocks or start/stop times. ERPA has successfully found optimizations for customer time entry by consolidating calculations and codes for communication with both project managers as well as payroll. Likewise, we have optimized Expenses through a variety of solutions.

Overall, we look at various options to automate and empower users. This can include:

- Automated expense policy enforcement
- Automated time approval workflow
- Receipt scanning via the mobile app for expense reporting
- Time and expense corrections and approvals via the mobile app
- The use of hubs such as for expenses

Ultimately, our team of Workday certified consultants work with client stakeholders to understand the business problems and areas of improvement to develop solutions in collaboration with client teams.

Similarly, with PeopleSoft, we conduct requirements gathering with client stakeholders to understand pain points as well as evaluate the current configuration. We automate as much as possible and encourage the use of Fluid and self-service features.

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

While ERPA does not perform software selection services and support, we do provide strategic roadmapping and cloud modernization consulting. We follow a rigorous methodology to generate intelligent, data-driven recommendations for our clients transitioning on-premise and cloud-based systems. This methodology incorporates a phased approach of Discovery (Assessment) and Migration Planning (Mobilization), followed by Migration and Modernization.

Discovery (Assessment) and Migration Planning (Mobilization) feature:

- **Agentless infrastructure discovery:** A non-intrusive, agentless approach to analyze your data and provide visibility into applications and infrastructure, with detailed insights across organizational, application, and infrastructure layers.
- **Application dependency and affinity mapping:** Identifies key application dependencies to ensure smooth migrations.
- **6-R Migration strategy recommendation:** Recommendations for replacing, rehosting, re-platforming, refactoring, re-architecting, rebuilding, or repurchasing.
- **Detailed licensing and TCO financial summary:** Comprehensive financial and licensing insights, enabling smarter cost and resource allocation decisions.
- **Cost saving analysis:** Identify potential cost savings with system-generated insights.
- **Target landing zone creation:** Preparation of a well-architected Landing Zone for your cloud environment, ready for migration.
- **Security and network posture assessment:** Ensure security and network integrity throughout the migration process.
- **Migration waves and move group creation:** Automated migration wave and move group creation, for efficient migrations based on application dependencies.
- **Top modernization recommendations:** Highlight applications that are prime candidates for modernization.
- **Execution plan generation:** Access reports to guide migration decisions.
- **Executive readout:** Summary report with key insights and findings helping in informed decision-making.

These outputs enable ERPA to provide valuable insights and recommendations for our clients. Additionally, as AWS, PeopleSoft, and Workday experts, we provide hyper-specialized recommendations in three (3) specific areas:

- PeopleSoft Modernization on AWS Cloud
- ERP Modernization to Workday
- IT Transformation on AWS Cloud

ERP initiatives may include optimizing existing systems like PeopleSoft on AWS for a SaaS-like experience, adopting Workday modules SaaS on AWS, or a combination of both. These strategic initiatives present organizations with a transformative opportunity to enhance operational efficiency, agility, and scalability.

When ERP modernization evacuates 30–50% of the data center, a strategic initiative for modernization of remaining infrastructure, in the form of IT Transformation on AWS Cloud, becomes very compelling. Broadening the scope of this ERP initiative to include a data center exit reduces Total Cost of Ownership (TCO), improves Return on Investment (ROI), and further strengthens the business case for ERP adoption and institutional modernization – in some cases, off-setting the cost of ERP deployment.

Transitioning away from on-premises infrastructure reduces capital expenditures, maintenance overhead, and the complexities of hardware lifecycle management. This comprehensive approach not only accelerates institutional modernization, but also enables organizations to redirect resources toward strategic priorities, leverage cutting-edge technologies, and ensure long-term sustainability. By integrating ERP SaaS adoption with data center exit planning, businesses can maximize value, drive cost efficiency, and position themselves for future growth.

Provide a description of the services for which the Responder is able to provide. In responding, please use the categories identified in Exhibit A of this RFP. Identify each Product Category you intend to respond to in Attachment B, and provide a detailed description of your firm's capability to provide each Product Category.

ERPA has addressed this requirement in the subsequent section.

5.2 SERVICE QUESTIONNAIRE [EXHIBIT B]

Indicate the services you are able to provide:

Service	Yes	No
Product Category #1	✓	
Product Category #2		X
Product Category #3	✓	
Product Category #4	✓	
Product Category #5	✓	
Product Category #6	✓	

Respondents should address the following items in Tab E: Technical Proposal if they are applicable for the service(s) being proposed.

- *Respondents are asked to identify services that they are able to provide.*
- *Respondents are not required to be able to respond to all services in order to provide a proposal to this RFP.*
- *Those Respondents that are capable of providing more than a single service, indicate which in the table above, and provide an individual narrative relating to the needs of each Bid Item as described in Exhibit A.*
- *Responses should consist of detailed descriptions of what a Respondent's firm is capable of providing to the TXSHARE Public Purchasing Cooperative. The narrative for each Product Category must be addressed, but Respondents are encouraged to provide additional detail about their operation and capabilities.*

ERPA can deliver services across all NCTCOG Product Categories except for #2, as it is often a conflict of interest to participate in software selection and also deploy the awarded solution. We have provided a brief overview and table mapping some of our key services to the Product Categories in the subsequent pages.

***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.*

ERPA will deliver these services through Application Management Support (Managed Services) and post-production support activities.

***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.*

ERPA will deliver these services through our proven implementation methodology for PeopleSoft and Workday, respectively. While ERPA can/has implemented PeopleSoft and modules for both PeopleSoft and Workday, we have focused the response to this section on a net new Workday deployment.

ERPA believes the focus of deployment and post-deployment engagements is solving business problems, not installing software, and that the measure of project success is adoption, not completion. As such, ERPA uses a business requirements-centric process, which is a key distinction, and it drives the activities during the project to ensure that those involved are aware of the impact of change and are prepared to take ownership of the solution. Our team has experience across numerous Workday deployments, which is why, collectively, we identified common customer challenges, opportunities, and lessons learned to determine our core Workday-aligned principles to achieve a successful deployment.

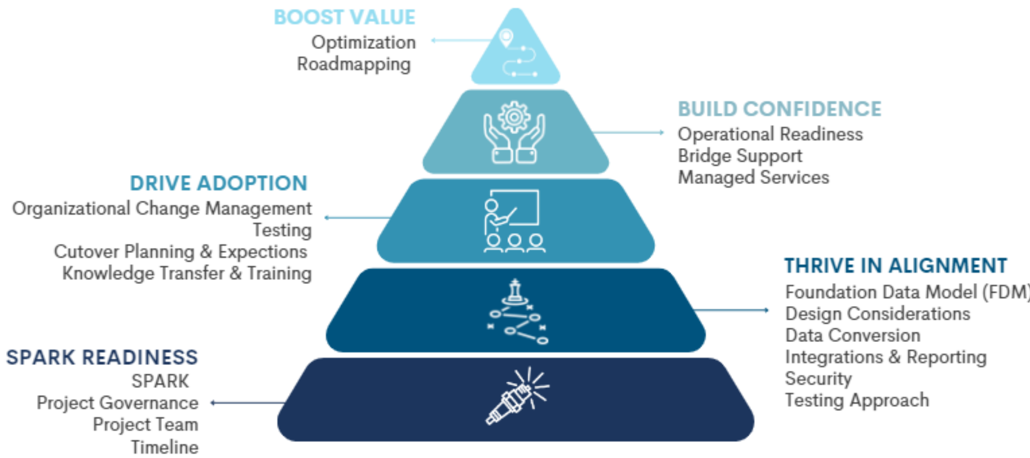


Figure 17 ERPA's Keys to Successful Workday Deployment

All ERPA consultants are Workday certified and follow Workday's proven methodology for deployment.

SPARK Readiness for Workday. As noted earlier, the ERPA Workday Practice was built around the idea of providing a new way to partner with Workday customers before and once they go live. As a result of our collective learning and experience, ERPA has established and will employ our unique, holistic, Phase 0 approach called *SPARK* as the foundation for achieving a successful deployment for our customers. SPARK supplements the Customer Preparation and Planning aspect of Workday's proven deployment methodology by incorporating both Workday and ERPA best practices while focusing on deepening our understanding of a particular institution's goals, objectives, challenges, opportunities, expectations, and culture.

Simply put, SPARK is a proactive set of pre-planning activities and groundwork centered around achieving four (4) key outcomes:

1. **Establishing partnership** with the client teams through collaboration and education on various aspects of the engagement including governance. The strong foundation of our relationship built together during SPARK will allow us to navigate project activities and milestones together with trust and confidence.
2. **Project alignment** across all parties by setting expectations upfront for key project aspects such as scope, timeline, and deliverables. Our experience has proven that when project team members are briefed and aligned on the key details of the project upfront, change acceptance is high and project plan activities are completed without issue.
3. **Mitigating downstream risk** by communicating, collaborating, and discussing critical considerations like cross-functional impacts, integration touchpoints, data conversion, and more. When risks are identified early in a project, they can be mitigated and even eliminated prior to interfering with the defined project plan.
4. **Gaining customer confidence** through demonstrated transparency, expertise, communication, and commitment to a successful Workday deployment. Confidence will not only be gained by the customer about ERPA through the SPARK process, but confidence will be abundant in the journey ahead. By participating in the activities contained within SPARK, participants will confidently embrace the next steps and feel empowered in their decision-making.

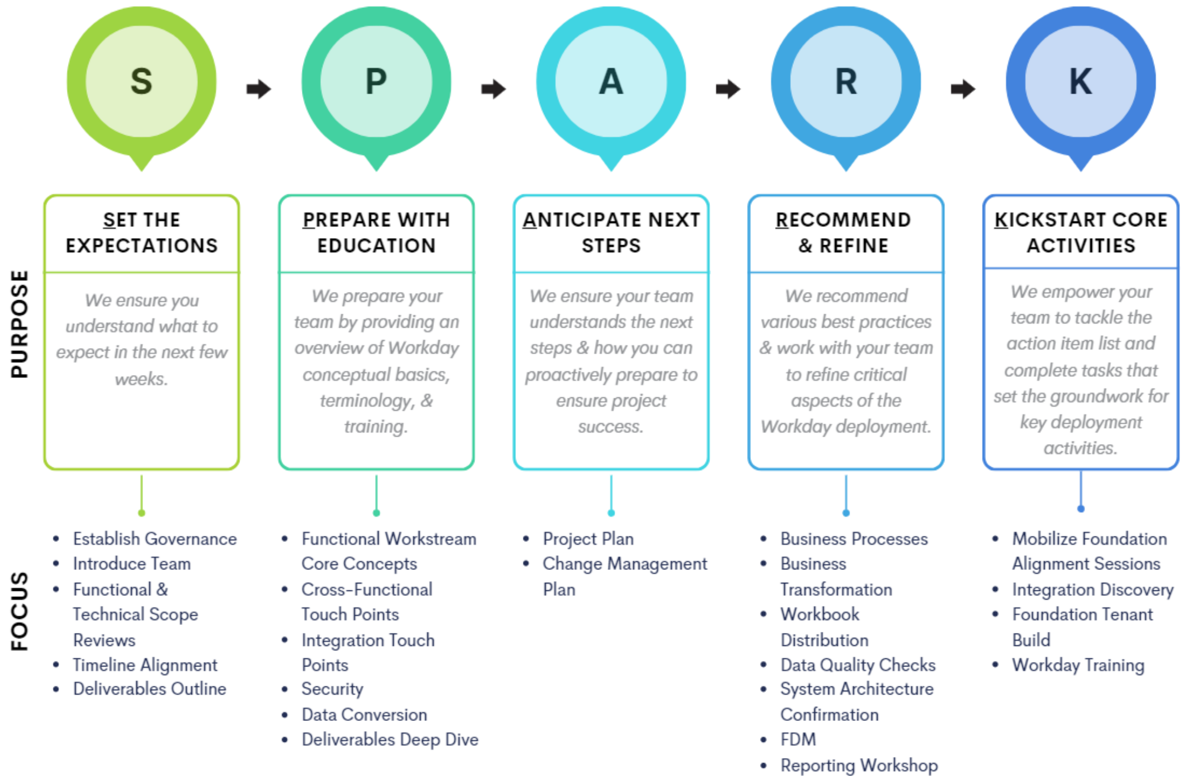


Figure 18 How ERPA Differentiates in Deployment Planning - SPARK (Phase 0)

Product Category #4: *Provide Standalone Review and Documentation Services for NCTCOG or 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.*

ERPA will deliver these services through activities like Art of the Possible for PeopleSoft, fit-gap analysis, stakeholder interviews, and discovery sessions, post-deployment Workday tenant diagnostic, and module diagnostic (Workday). All activities will be presented and documented.

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.*

ERPA will deliver these services through our cloud migration and hosting services for PeopleSoft and Workday, and Application Management Services for ongoing upgrade support as applicable to the respective ERP system.

Product Category #6: *Provide ERP Consultancy Services otherwise not anticipated in this RFP.*

While this category is broad, we most commonly see and can deliver:

- Data center evaluation and IT modernization on the cloud as an opportunity during ERP modernization
- Use case development for GenAI when the ERP system is hosted on the cloud (e.g., chatbots, advanced data insights/reporting, etc.)
- Use case development for Workday Extend application development for instances when delivered Workday functionality does not meet organizational requirements.

Table 1 ERPA's High-Level Services

Products/Services Description	Key Activities/Services Included	Product Category 1	Product Category 3	Product Category 4	Product Category 5	Product Category 6
Workday						
Workday Implementation (HCM/Payroll/Financials/Student)	Project planning and initiation, system design and configuration, data migration, integration, testing, training and change management, post-deployment support		✓	✓	✓	✓
Workday SKU/Module Implementation	New module or functionality implementation following agile implementation methodology.		✓			
Workday AMS	Services and support post go-live including, but not limited to managed services, integrations, implementation, diagnostics, and optimizations.	✓	✓	✓	✓	✓
Payroll & Financial Bridge Support	Extended hands on support after go-live for payroll and financial processing periods. Mimics support given during implementation including weekly workstream calls, configuration support, and processing assistance.	✓		✓		✓
Workday Module Diagnostic	Project planning and initiation, design, build, worksets, integration, testing, training and post-deployment support for new modules/SKUs or functionality.	✓		✓		
Workday Tenant Diagnostic & Health Check	Ensures tenant is operating optimally inclusive of performance monitoring, health checks, error tracking, configuration analysis, usage reports, integration diagnostics, and compliance checks.	✓		✓		
Workday Extend Application Development	Build, deploy, and manage custom applications within the Workday ecosystem to extend functionality and create tailored solutions to meet specific business needs.					✓
Integration Warranty Assessment	Includes review of documentation, creating a comprehensive list of all integrations, performing architecture and code reviews, checking configurations, conducting performance testing, functional testing, performing a security and risk	✓		✓		✓

Products/Services Description	Key Activities/Services Included	Product Category 1	Product Category 3	Product Category 4	Product Category 5	Product Category 6
	assessment, and gathering user feedback to ensure integrations are reliable, secure, and meeting business requirements.					
Reporting Workshop	Provides valuable insights into how to effectively use Workday's reporting capabilities to extract, analyze, and visualize data within the Workday system. Our instructors cover foundational concepts, advanced reporting techniques, and hands-on exercises to ensure attendees gain practical skills and insights.			✓		✓
Workday Extend Workshop	Educational session on how to leverage Workday Extend and identify potential use cases.			✓		✓
Workday to AWS Migration	Packaged services designed to educate and ease the migration of Workday tenant to AWS from the private cloud.			✓	✓	✓
Functional Consulting	Resolve issues related to configuration, answer 'how to' questions, and support business events such as year-end/ month-end close. Provide functional support for PUM updates including fit-gap analysis, and configuration as required. Perform functional systems and integration testing as required. Provide training and execute Change Management to support end users. Gather business requirements for minor/major enhancements, new module implementations, configuration, dashboard and report management/development, testing support.	✓		✓		
Oracle/PeopleSoft						
Managed Services	Comprehensive application management including but not limited to, PeopleSoft administration, database administration, PeopleTools updates, patches and fixes, CPU	✓			✓	

Products/Services Description	Key Activities/Services Included	Product Category 1	Product Category 3	Product Category 4	Product Category 5	Product Category 6
	patching, HCM/Finance/Campus Solutions specific updates, etc.					
Art of the Possible	Educational session and requirements-centric assessment to identify challenges and opportunities with existing delivered PeopleSoft software. Includes recommendations and roadmapping.					✓
Module Implementation	New module implementation services including functional and technical support		✓		✓	
Fluid Deployment	Fluid implementation services to assess client Fluid requirements, evaluate customizations (for possible migration to Fluid), perform Fluid page conversion/ development, define Homepage and security requirements, and provide cutover and production support activities			✓	✓	✓
Testing Automation	Implementation of PTF and ERPA's TAP accelerator					✓
Application Development & Enhancements	Technical development and enhancement needs within PeopleSoft.	✓				
Application Upgrade Services	Major application version upgrade project execution				✓	
PeopleTools Upgrade Services	PeopleTools version upgrade project execution				✓	
PUM Update Services	Schedule, analyze, and deploy annual PUM updates, including impact analysis, functional adoption of new features, PeopleSoft Administration support for environments, customization retrofits, and testing coordination	✓			✓	
Advisory Services	Road Map, Cloud Migration, and Long-Term Plan strategies are common Advisory Services ERPA provides.					✓
AWS Cloud						
Optimization & Licensing Assessment	ERPA's Optimization & Licensing Assessment (OLA) for Oracle is designed to empower organizations with knowledge on the type of licensing in place, how licenses are utilized, and the best way to modernize Oracle applications on AWS to retain business-				✓	✓

Products/Services Description	Key Activities/Services Included	Product Category 1	Product Category 3	Product Category 4	Product Category 5	Product Category 6
	specific customizations, optimize the database, and ensure they can meet business needs now and in the future.					
Cloud Readiness Assessment	Comprehensive assessment focused on people, technologies, tools, and processes to understand an organization's readiness for Cloud.				✓	✓
Modernization Services	Comprehensive assessment focused on cloud modernization for legacy systems including PeopleSoft and Ellucian applications and ancillary applications as well as complete data center. Includes an analysis of multiple cloud infrastructure providers if requested.				✓	✓
Proof of Concept	ERPA's Proof of Concept (POC) service is designed to provide organizations with knowledge and a real feel of their applications performance on AWS infrastructure and to see firsthand the benefits of enhanced performance, scalability, and high availability delivered in the cloud infrastructure solution.			✓		
Migration Services	Includes architecture design, provisioning, cutover planning, migration, and post-migration stabilization.				✓	
Cloud Managed Services	Comprehensive management and operations of the AWS cloud infrastructure. Typically, an additional layer to PeopleSoft Managed Services, but can be standalone. Services include: • DR services • Backup and storage services • Provision infrastructure • Administer and manage AWS infrastructure • Perform capacity planning for AWS infrastructure • Maintain Infrastructure as Code (IaC) and perform DevOps activities	✓				

Products/Services Description	Key Activities/Services Included	Product Category 1	Product Category 3	Product Category 4	Product Category 5	Product Category 6
	• Maintain and monitor infrastructure security • Maintain and monitor infrastructure performance • Troubleshoot AWS infrastructure issues • Scale infrastructure up to address application peak load situations					
Disaster Recovery as a Service (DRaaS)	This service leverages AWS Cloud Infrastructure for Disaster Recovery and is scaled to meet an organizations specific RTO and RPO requirements.	✓			✓	
Beyond ERP Workshops and Deployments:	Understand and leverage additional capabilities powered by AWS beyond infrastructure including Chatbots and Generative AI. Each of these tools are system and platform agnostic, meaning organizations can take actions, collect data, and return answers and data across PeopleSoft, Workday, Salesforce, or any other application to the end-user.					✓
Staffing Services						
Staff Augmentation	Staffing services for project-based deliverables, support services, and other requirements across multiple technologies and skillsets.	✓	✓	✓	✓	✓

5.3 PRIMARY COMPONENTS OF AN ERP SYSTEM IN RFP SECTION 5.0

*Address the **Primary Components** of an ERP System in Section 5.0, and provide a narrative as to how your firm delivers for each component. Should your firm be capable of addressing the Other Features, provide a narrative as to how your firm delivers for each other feature.*

ERPA meets this requirement.

***RFP Section 5.0 – Scope of Work.** The overall vision of the ERP Consultancy Services RFP is to retain a vendor or vendors that are able to provide services that address the needs of TXShare Entities relating to the **8 Primary Components** of an ERP System, including but not limited to:*

- *Accounting and Financial Management*
- *Human Resources (HR)*
- *Customer Relationship Management (CRM)*
- *Business Intelligence (BI)*
- *Supply Chain Management (SCM)*
- *Manufacturing and Logistics Management*
- *Inventory Management*
- *Warehouse Management*

***Other Features** components desirous of an efficient ERP System:*

- *Event Management*
- *Risk Management*
- *Sales*
- *Order*
- *Management*
- *E-commerce*
- *Market Management*
- *Advanced Planning and Forecasting*

Failure to provide written response to items indicated in this section will be interpreted by NCTCOG as an inability by the firm to provide the requested product, service or function.

As noted earlier, ERPA was founded in 1999 with a focus on implementing, optimizing, modernizing, and supporting critical enterprise applications like PeopleSoft and Workday, to solve business problems through a requirements-centric lens. To this end, our consultants are deeply experienced in delivering all services – from deployment to post-production support, and everything in between – for the primary components listed. We have detailed these services throughout this response.

Our PeopleSoft resources average 12 years of experience, with functional consultants averaging over 15. Likewise, our Workday certified consultants average 7.5 years of experience with several cross-functional certifications, making our team one of the most tenured in the ecosystem.

Most ERP systems incorporate the primary components listed, and/or offer seamless integration capabilities with third-party solutions to establish a unified technology solution and user experience.

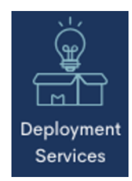
Table 2 PeopleSoft & Workday Delivered Functionality

Primary Component	Native to PeopleSoft	Native to Workday
Accounting & Financial Management	✔	✔
Human Resources	✔	✔

Customer Relationship Management (CRM)	✓	
Business Intelligence (BI)	✓	✓
Supply Chain Management (SCM)	✓	✓
Manufacturing & Logistics Management	✓	
Inventory Management	✓	✓
Warehouse Management	✓	
Other Features/Desired Components	**Native to PeopleSoft**	**Native to Workday**
Event Management	✓	
Risk Management	✓	
Sales	✓	
Order Management	✓	
E-Commerce		
Market Management	✓	
Advanced Planning & Forecasting	✓	✓

From a PeopleSoft perspective, our support is largely focused on module implementations, business process optimization, managed services, and post-production support for PeopleSoft HCM, FSCM, CRM, ELM, etc., as organizations are not deploying net new PeopleSoft systems. For the purposes of this response, we have largely focused on Workday.

ERPA routinely delivers the following services and support for the Primary Components (and other features/desired components via superior integration support) for Workday:



Deployment Services. ERPA provides a full range of deployment and consulting services to address business challenges and continuous improvement for Workday. This includes net new deployments, new module and/or functionality implementation, business process optimization, workshops, etc. Our team has deep experience deploying new modules, and each consultant averages 20+ end-to-end implementations across their consulting and client-side Workday experience.

Our Workday experts have extensive experience and expertise in Workday implementation methodology and tools. These Workday best practices serve as the foundation for all work ERPA performs. ERPA has championed an agile methodology for optimizations, integrations, and architecting and configuring new Workday modules from day one. For example, in our agile approach to module implementations, ERPA logically groups design objectives into smaller and more manageable sets that we call *Worksets*. Each Workset will include design, configuration, unit testing, and a playback session to review and confirm design decisions. The benefit of this iterative approach leads to improved architect workshops, early analysis, and an earlier view into proof of concept, all leading to better and more informed decision-making.

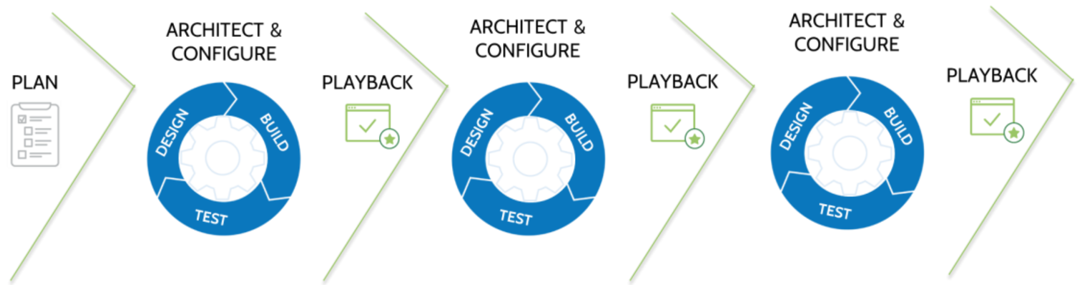


Figure 19 ERPA Agile Approach

Managed Services. ERPA takes a strategic approach to Workday post-production support to help our customers achieve a better return on their investment. We offer AMS services based on the most requested post-implementation support needs. Key to ERPA's unique offering is a dedicated Engagement Manager, integration warranties for new and current integrations, reporting and analytics to enable forward-thinking, update release support, Extend application support, and many other commonly requested post go-live services such as those listed below. These are also services we noted as desirable after we implemented our own Workday tenant.

- Go-Live Stabilization. End-to-end support of configurations and integrations to account for issue triage and troubleshooting.
- Day-to-Day Operations. Production configuration, integration, and business process maintenance and repairs; report and dashboard updates and development, security updates, and skills and knowledge transfer.
- Cyclical Event Preparation. *Event* preparation to support our customers throughout the calendar year, open enrollment, ACA, annual compensation reviews, performance reviews, and more.
- Roadmapping Services. Strategic Workday roadmap assessment and planning, guiding principles, critical use cases, change management, and training services. We take into consideration your current initiatives, seasonality, and other company competing projects and prioritize your initiatives to reach your goals.
- Integrations Support. Integration managed services, integration builds, and integration assessments with integration assurances, which include warrantied work and unlimited break-fixes of existing integrations. ERPA is the only Workday partner in the ecosystem to provide a warranty on integrations. This means there is no additional cost for bug fixes or issues from the integration build. We also provide a warranty on previously built Workday integrations that pass our assessment if a support contract with ERPA is in place at an additional cost.

Private to AWS Cloud Migration. ERPA offers public cloud migration packages that are tailored to each organization's unique needs and team capabilities, ranging from experiential guidance and full support and testing. Migrating Workday applications from the private cloud to AWS public cloud offers the highest levels of infrastructure performance, security, scalability, and key benefits that organizations will realize quickly such as zero downtime patching, enhanced compliance with data and regulatory requirements, ensured availability during regional maintenance windows, and the ability to accelerate innovation with AWS native services for AI/ML.

	FEATURES	STRATUS	CUMULUS	CIRRUS
MIGRATE	AWS Planning Workshop	☁	☁	☁
	Custom Project Templates	☁	☁	☁
	Change Management Roadmap	☁	☁	☁
	Testing Roadmap	☁	☁	☁
	Testing Enablement		☁	☁
	Post-Migration Support		☁	☁
OPTIMIZE	Workday Feature Adoption Workshop		☁	☁
	Tenant Health Check		☁	☁
	Art of the Possible - Workday & AWS			☁
	Analytics & Reporting Workshop			☁

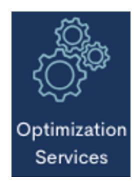
No charge/DIY

Figure 20 ERPA's Private to Public Cloud Migration Packages

Because of our relationship with Workday and our extensive AWS certifications, ERPA has been selected as one (1) of now six (6) recommended Workday partners for migrating client Workday tenants from the private cloud to the public cloud. In fact, we migrated our own Workday tenant to AWS over a weekend in October 2023. Shortly after, the private cloud experienced a service disruption that did not impact ERPA.

Extend Applications. ERPA's focus is on leveraging delivered functionality to the fullest extent but recognizes opportunities to extend Workday to meet customer needs. Our Workday Extend team is focused on working with customers to develop Extend applications that are repeatable and scalable to solve common business problems, organization-specific problems, and supplement delivered Workday functionality. Our Extend services are highly collaborative and include conducting educational sessions, use case workshops, and application design, build, and deployment services.

Reporting & Prism Analytics. Our Workday reporting and Prism analytics services are based on leveraging delivered Workday reporting capabilities and enhancing data-driven insights with Prism. These services include Advanced Reporting development and clean-up, workshops focused on identifying and evaluating Prism use cases, customized Prism dashboards, and educational sessions and training.



Optimization Services. ERPA's optimization services are centered on ensuring organizations are leveraging Workday in the best possible manner. This includes performing full tenant or module-specific diagnostics, a thorough assessment of selected workstream(s) that is summarized in an assurance diagnostic report with recommendations for benchmarks and optimization, business process evaluation, tailored documentation, deliverable prioritization, and future state planning.

Payroll & Financial Bridge. ERPA's Payroll and Financial Bridge offering serves as transitional support between Workday go-live and AMS support as an optional, but additional set of activities beyond the hypercare support period. As such, we provide customers hands-on support for critical periods like payroll and month-end financial reporting for up to six (6) months after go-live related post-production/hypercare support. Bridge support mimics the support we (or another partner) provide during implementation including weekly workstream calls, configuration support, and workflow assistance.

Workforce Expansion. ERPA maintains a bench of Workday consultants, Our Independent Partner Program (IPP/+) that we can utilize for surge support on AMS engagements as well as for projects and client-side staffing needs. These are highly vetted candidates, 90% of which are referrals from ERPA's Workday consultant employees who can attest to their quality of work, expertise, and experience. IPP/+consultants undergo a rigorous screening process to ensure they are both qualified professionally and a cultural fit for ERPA. We pride ourselves on the depth and breadth of experience from our employees and IPP/+ consultants alike, as we choose not to use ERPA as a training ground for newer consultants in the Workday ecosystem.

5.4 ORGANIZATIONAL OPERATION

Additional consideration may be allocated upon the following:

1. Description of the Proposer's process for responding to an order for product.

ERPA is adept at managing large-scale contract vehicles and cooperative purchasing contracts. As such, we standardize our process to make it easy for NCTCOG and Participating Entities. For example, we can establish a single email address, online intake form, and product-based points of contact wherein organizations can inquire about products and services, submit RFPs, etc. to ensure timely response. From there, our contract support team will internally review any email correspondences or intake form responses and engage the appropriate business development resource to understand needs, requirements, etc. before engaging consulting resources and/or providing a Scope of Work (SOW).

2. Description of the Proposer's process for delivering orders to respective clients.

As noted earlier, ERPA's core business lines are PeopleSoft, Workday, and AWS consulting services that are delivered by dedicated practices within our organization. While the delivery models within each practice may vary based on the technology and project, the process is largely the same. This entails an in-depth discovery process with ERPA's experts and NCTCOG or Participating Entity teams, followed by presentations (if necessary) and an SOW for review and negotiation. Once mutually executed, the ERPA engagement lead (e.g., Project Manager, Service Delivery Manager, Engagement Manager, etc.) will conduct a kickoff call, introducing the delivery team, and aligning with customer stakeholders before service delivery begins.

3. Description of the Proposer's customer satisfaction services, to include any warranty and/or repair capabilities.

Service delivery excellence and customer satisfaction are at the center of everything we do for our clients. ERPA includes hypercare support for all project services and warranties the work for varying time periods depending on the scope. We incorporate various communication touchpoints and meeting cadences throughout our engagements – whether project-based on ongoing – through a well-defined engagement management and governance approach.

Further, we measure success for ongoing services like Application Management Services by assessing various metrics such as the overall reduction in module or process-specific tickets, mean time to resolve, SLA adherence, and customer feedback surveys. This includes individual ticket/service request star ratings. We also employ a Net Promoter Score (NPS) program, the world's leading metric for measuring customer satisfaction. We proudly boast an NPS rating of 67 (the industry average being only 43).

4. Description of the Proposer's invoicing process used by the Proposer.

We pride ourselves on our flexibility as a partner from contract negotiation to delivery. ERPA's Finance & Accounting Team is responsible for ensuring the timeliness and accuracy of all customer invoices. All services are invoiced and include the following as applicable:

- Description of the services provided and/or project milestone
- Consultant(s) hourly rates multiplied by the number of hours tracked in our system or fixed hours as previously agreed
- Fixed fee for ongoing services like Application Management Services or fixed scope/fixed fee projects
- Any contract or client-specific invoicing requirements

All invoices are structured according to the terms of the agreed upon SOW (e.g., frequency of invoicing, required line items, payment terms, etc.) – typically due net 30 – and reviewed and approved before submission to the client.

5. Any assumptions made in responding to the requirements.

Any assumptions ERPA may have will be specific to each engagement with NCTCOG and Participating Entities as applicable.

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.

No exceptions are taken to any part of this RFP.

7. Any special features or services the Proposer is proposing in response to the requirements that are included within the pricing provided.

We can deliver any services described throughout this response, and beyond for NCTCOG and Participating Entities. As noted earlier, we tailor our solutions to meet each customer's unique needs which we can delivery via Time & Materials (T&M) and/or Fixed Fee.

6. TAB F: PRICING [RFP SECTION 6, RFP SECTION 5.5, EXHIBIT B]

Respondents should furnish a proposal that specifies pricing for the services they propose. For more information, please refer to Exhibit B.

Points will be awarded on the basis of the competitiveness of the Cost Proposal. <OR>
Points will be awarded on the basis of the overall cost effectiveness and clarity in identifying/explaining costs.

Pricing [RFP Section 5.5]
This Request for Proposals requires "employee rate card" pricing. Respondents should furnish a proposal that indicates a per-hourly rate for each sort of staff that they employ to be applied to all items in Respondent's product categories. Projects sold under a contract resultant of this RFP would be structured by the total number of hours required of each staff member to accomplish any desired task.

Respondent will not include freight, transportation and delivery charges or costs or sales tax in Proposal pricing.

ERPA meets this requirement.

6.1 PRICING PROPOSAL (FIRM/ORGANIZATION)

Respondents are to provide a rate chart for the labor categories/ skill sets outlined below. All rates should be presented as fully loaded hourly rates. Include any other cost categories that should be considered within the "other" category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation.

Per response to offerors' questions (question #2), ERPA has added an additional column in the below spreadsheet to address on/offshore blended hourly rates. Blended rates include work performed in the US (including customer facing liaison) and offshore (Hyderabad, India). Not all roles are available using a blended rate model. All rates are not-to-exceed.

ERPA is flexible and offers Time and Materials (T&M) and Fixed Fee contracting options as the scope of work allows in order to tailor our solutions to meet NCTCOG and Participating Entities' unique needs. We understand the budgetary challenges and opportunities of publicly funded organizations and is accustomed to proposing and packaging services in a variety of pricing constructs. As such, we are not proposing a catalog of services, but rather rates as submitted as a baseline.

	Procurement Number:	NCT 2025-017	
Respondent Name:	ERP Analysts, Inc.		
Enterprise Resource Planning Consultancy - SHARE Cooperative Purchasing Program			
Item	Description	Offered Price – Remote Hourly Rate (US-Based)	Offered Price – Remote Hourly Rate (Blended)
Oracle/PeopleSoft			
1	PeopleSoft Program Manager	$ 198.85	
2	PeopleSoft Principal Project Manager	$ 185.53	
3	PeopleSoft Project Manager	$ 176.30	
4	PeopleSoft Engagement Manager	$ 172.20	
5	PeopleSoft Service Delivery Manager	$ 164.00	

6	PeopleSoft Solution Architect	$ 172.20	
7	PeopleSoft Developer	$ 148.63	$105.58
8	PeopleSoft Administrator	$ 148.63	$105.58
9	PeopleSoft Technical Lead	$ 153.75	
10	PeopleSoft Technical Analyst	$ 145.55	
11	PeopleSoft Business Analyst	$ 145.55	
12	PeopleSoft Functional Consultant (HCM/FIN)	$ 166.05	
13	PeopleSoft Functional Consultant (Campus Solutions)	$ 178.35	
14	PeopleSoft Security Lead	$ 157.85	
15	PeopleSoft Security Analyst	$ 151.70	
16	PeopleSoft QA/Testing Lead	$ 135.30	
17	PeopleSoft QA/Testing Analyst	$ 125.05	$ 88.15
18	Database Administrator (Oracle, SQL Server, etc.)	$ 148.63	$105.58
19	PeopleSoft Trainer	$ 159.90	
20	PeopleSoft Organizational Change Management Lead	$ 176.30	
Workday			
21	Workday Engagement Manager	$ 211.15	
22	Associate Workday Engagement Manager	$ 172.20	
23	Workday Architect	$ 223.45	
24	Principal Workday Consultant	$ 195.78	$ 91.23
25	Senior Workday Consultant	$ 180.40	$ 80.98
26	Workday Consultant	$ 167.08	$ 72.78
27	Associate Workday Consultant	$ 153.75	
28	Workday Trainer	$ 182.45	
29	Workday Organizational Change Management Lead	$ 205.00	
Cloud			
30	Cloud Solution Architect (AWS, Azure, OCI, GCP)	$178.35	
31	Cloud Engineer (AWS, Azure, OCI, GCP)	$ 161.95	$ 114.80
32	Cloud Administrator (AWS, Azure, OCI, GCP)	$ 161.95	
33	Cloud DevOps Engineer (AWS, Azure, OCI, GCP)	$ 166.05	
Other ERP/Technologies			
34	Senior Application Consultant	$ 178.00	
35	Application Consultant	$ 152.00	
36	Senior Technical Lead	$ 172.00	
37	Application Administrator	$ 160.00	
38	Salesforce Consultant	$ 186.00	
39	Salesforce Administrator	$ 200.00	
40	Salesforce Education Cloud Consultant	$ 213.00	
41	MuleSoft Consultant	$ 239.00	
42	ServiceNow Consultant	$ 186.00	
43	Developer (e.g., JavaScript, .NET, Python, etc.)	$ 160.00	
44	Data Engineer	$ 200.00	

45	Data Analyst	$ 200.00	
46	Tableau Data Analyst	$ 200.00	
47	Power BI Data Analyst	$ 200.00	
48	Database Administrator (non-PeopleSoft related)	$ 166.00	
49	COBOL Mainframe Developer	$ 133.00	
50	OBIEE Developer	$ 200.00	
51	Informatica Developer	$ 160.00	
52	SAP Consultant	$ 200.00	
53	Agile Project Manager	$ 200.00	
54	UI/UX Developer	$ 186.00	
55	Identity & Access Management (IAM) Consultant	$ 200.00	
Contractor shall provide additional Enterprise Resource Planning goods or services at cost plus:		36%	

AWS Cloud. ERPA offers AWS cloud services to NCTCOG and Participating Entities at an **up to 2.5 percent (2.5%) discount** off list price.

Because AWS continually innovates and rapidly grows available services, ERPA offers the use of all current and future AWS Cloud services as they are available. The always up-to-date list of AWS services and products is located here:

https://aws.amazon.com/products

The list pricing for all current AWS services is located here:

https://aws.amazon.com/pricing/services/

7. TAB G: PROOF OF HUB CERTIFICATION

From Addenda 2, response to questions (question #16), it is our understanding that NCTCOG recognizes the following MBE certifications.

Table 3 ERPA is certified as a Minority Business Enterprise

Agency	Certification Type	Renewal
South-Central Texas Regional Certification Agency	Minority Business Enterprise (MBE)	8/31/2026
	Asian American Business Enterprise (ABE)	8/31/2026
National Minority Supplier Development Council	Minority Business Enterprise (MBE)	9/30/2025

Copies of these certifications are included with **Attachment IX**: Historically Underutilized Businesses, Minority or Women-Owned or Disadvantaged Business Enterprise Form (**Section 8.9**).

8. TAB H: REQUIRED ATTACHMENTS

Please include signed copies of all ATTACHMENTS (beginning with ATTACHMENT I) appended to the back of this solicitation document. All attachments must be submitted with the proposal, or the proposal may be disqualified as nonresponsive.

REQUIRED ATTACHMENT CHECKLIST

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS "**NOT APPLICABLE**" AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☒ Page 1 - Cover Sheet
- ☒ Page 19 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☒ Page 20 - Attachment II: Certification of Offeror
- ☒ Page 21 - Attachment III: Certification Regarding Debarment
- ☒ Page 22 - Attachment IV: Restrictions on Lobbying
- ☒ Page 24 - Attachment V: Drug-Free Workplace Certification
- ☒ Page 25 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☒ Page 28 - Attachment VII: Certification of Fair Business Practices
- ☒ Page 29 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☒ Page 30 - Attachment IX: Historically Underutilized Businesses, Minority Or Women-Owned Or Disadvantaged Business Enterprises
- ☒ Page 31 - Attachment X: Federal and State of Texas Required Procurement Provisions - Not Applicable
- ☒ Page 34 - Exhibit A: Description of Desired Product Categories for Proposed Pricing
- ☒ Page 36 - Exhibit B: Sample Market Basket Form
- ☒ Page 38 – Exhibit C: Service Area Designation Forms
- ☒ Respondent recognizes that all proposals must be submitted electronically through Public Purchase by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.

8.1 ATTACHMENT I: INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL

ATTACHMENT I:
INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

Compliance with the NCTCOG Standard Terms and Conditions

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 2.2 - General Terms and Conditions.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.2 ATTACHMENT II: CERTIFICATION OF OFFEROR

ATTACHMENT II:
CERTIFICATIONS OF OFFEROR

I 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. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the 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.

I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Matthew McPeek (typed or printed name) certify that I am the Chief Financial Officer (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and 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.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.3 ATTACHMENT III: CERTIFICATION REGARDING DEBARMENT

ATTACHMENT III:

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;

2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statues or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;

3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,

4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.4 ATTACHMENT IV: RESTRICTIONS ON LOBBYING

ATTACHMENT IV:
RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding $100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of $100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding $100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification or any federal contract, grant, loan, or cooperative contract; and

2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying", in accordance with the instructions.

3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.5 ATTACHMENT V: DRUG-FREE WORKPLACE CERTIFICATION

ATTACHMENT V:
DRUG-FREE WORKPLACE CERTIFICATION

The ERP Analysts, Inc. (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the ERP Analysts, Inc. (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statue in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statue or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.6 ATTACHMENT VI: CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST

ATTACHMENT VI:
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST

The undersigned certifies that, to the best of his or her knowledge or belief, that:

"No employee of the contractor, no member of the contractor's governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents".

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

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CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a). By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. *See* Section 176.006(a-1), Local Government Code. A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.	**OFFICE USE ONLY** Date Received

1 **Name of vendor who has a business relationship with local governmental entity.**

2 ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 **Name of local government officer about whom the information is being disclosed.**

Name of Officer

4 **Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

5 **Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity   Date

Form provided by Texas Ethics Commission   www.ethics.state.tx.us   Revised 1/1/2021

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CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

(A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;

(B) a transaction conducted at a price and subject to terms available to the public; or

(C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds $2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than $100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

Form provided by Texas Ethics Commission www.ethics.state.tx.us Revised 1/1/2021

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8.7 ATTACHMENT VII: CERTIFICATION OF FAIR BUSINESS PRACTICES

ATTACHMENT VII:
CERTIFICATION OF FAIR BUSINESS PRACTICES

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

ERP Analysts, Inc.

Signature of Authorized Representative:

Matthew McPeek (Jan 21, 2025 18:02 EST)

Date: 01/21/2025

RFP 2025-017

8.8 ATTACHMENT VIII: CERTIFICATION OF GOOD STANDING TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

ATTACHMENT VIII:
CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

X The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

____ The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation):
- ☐ Sole Proprietor
- ☐ Partnership
- ☐ Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

ERP Analysts, Inc.
(Printed/Typed Name and Title of Authorized Representative)

Matthew McPeek (Jan 21, 2025 18:02 EST)
Signature

Date: 01/21/2025

RFP 2025-017

8.9 ATTACHMENT IX: HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES

ATTACHMENT IX:
HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB companies should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
http://www.window.state.tx.us/procurement/prog/hub/

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
http://www.nctrca.org/certification.html

Submitter must include a copy of its minority certification documentation as part of this solicitation.
If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

__X__ Minority-Owned Business Enterprise

_____ Women-Owned Business Enterprise

_____ Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

____
Authorized Signature

Matthew McPeek — Typed Name

2/25/2025 — Date

Subscribed and sworn to before me this 25 day of February (month), 2025 in Dublin (city), Franklin (county), OH (state).

______________________________ **SEAL**

Notary Public in and for Franklin (County),
State of OH Commission expires: 07/31/2028

NOTARIAL SEAL
STATE OF OHIO

MICHELE BOWLING
Notary Public, State of Ohio
My Commission Expires:
July 31, 2028

RFP 2025-017

From Addenda 2, response to questions (question #16), it is our understanding that NCTCOG recognizes the following MBE certifications.

NMSDC
National Minority Supplier Development Council

THIS CERTIFIES THAT

ERP Analysts, Inc

* Nationally certified by the: **OHIO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 541511; 541512; 541513

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

09/30/2024	CN21161
Issued Date	**Certificate Number**
09/30/2025	
Expiration Date	**George Simms, President & CEO**

Ying McGuire
NMSDC CEO and President

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: http://nmsdc.org

Certify, Develop, Connect, Advocate.

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

SOUTH CENTRAL TEXAS REGIONAL CERTIFICATION AGENCY

Your unified certification source
www.sctrca.org

August 1, 2024

Srikanth Gaddam
ERP Analysts, Inc. DBA ERPA
425 METRO PLACE N STE 510
DUBLIN, OH 43017

Dear Srikanth Gaddam:

We are pleased to inform you that your application for certification in our Small, Minority, Woman and Veteran Business Enterprise (S/M/W/V) Program has been approved. Your firm met the requirements of the SCTRCA Policy and Procedure Manual and is currently certified as a:

***ABE MBE**

Certification Number: **224083712**
Certification Expiration: **August 31, 2026**

Providing the following products or services:
NAICS 541511: SOFTWARE PROGRAMMING SERVICES, CUSTOM COMPUTER
NAICS 541512: COMPUTER SOFTWARE CONSULTING SERVICES OR CONSULTANTS
NAICS 541513: COMPUTER SYSTEMS FACILITIES (I.E., CLIENTS' FACILITIES) MANAGEMENT AND OPERATION SERVICES

On the two year anniversary date of your certification, you are required to provide a renewal application affirming that no changes have occured affecting your certification status. The SCTRCA will send you a Certification Renewal reminder **sixty (60) days** prior to your expiration date. <u>The SCTRCA will no longer include a certificate upon certification renewals.</u> **Your expiration date is August 31, 2026.**

Please notify this office within **thirty (30) days** of any changes affecting the size, ownership, control requirements, or any material change in the information provided in the submission of the certification application. Thank you in advance.

Sincerely,

Sheena Thomas
Executive Director

8.10 ATTACHMENT X: FEDERAL AND STATE OF TEXAS REQUIRED PROCUREMENT PROVISIONS

ATTACHMENT X
NCTCOG FEDERAL AND STATE OF TEXAS REQUIRED PROCUREMENT PROVISIONS
The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT CERTIFICATION

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
C) Telecommunications or video surveillance services used by such entities or using such equipment.
D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.

The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☐ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.**

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ____________________

NAME OF COMPANY: ____________________

DATE: ____________________

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.**

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ____________________

NAME OF COMPANY: ____________________

DATE: ____________________

RFP 2025-017

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that "discrimination against a firearm entity or firearm trade association" includes the following:

A) means, with respect to the entity or association, to:

I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and

II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or

III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.

B) An exception to this provision excludes the following:

I. contracts with a sole-source provider; or

II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☐ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

RFP 2025-017

BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that "boycott energy company" means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☐ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON: Not Applicable

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

RFP 2025-017

8.11 EXHIBIT A: DESCRIPTION OF DESIRED PRODUCT CATEGORIES FOR PROPOSED PRICING

Exhibit A, from Addendum 1, is included here for compliance. As per RFP instructions, the Challenge Objectives have been addressed within Tab E (Section 5.1) above.

EXHIBIT A
Description of Desired Product Categories for Proposed Pricing

Respondents should furnish a proposal that specifies pricing for the products and services they propose.

Responses are encouraged from vendors who can only provide a handful of products and services. Respondents are not expected to be able to provide the entirety of the desired services, though are welcome to if they are able!

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 for NCTCOG or 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*.

Challenge Objectives
The following list of project deliverables are anticipated by TXShare Entities leveraging a contract resultant of this RFP.

In addition to the narratives desired regarding your firm's capability to provide Product Categories 1-6, and the Primary Components/Other Features of an ERP, Respondents are invited to propose solutions that address the following operational challenges, including but not limited to:

- 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?
- 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?

- 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.?
- 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?
- What recommend 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?
- What services can your firm provide for better tracking and management of the projects and assets?
- How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?
- What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;
- What methods could your firm provide for the capturing and production of consistent, expandable set of data;
- 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; and
- How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.
- How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?
- How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?
- How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?

8.12 EXHIBIT B: SERVICE QUESTIONNAIRE AND PRICING PROPOSAL

Exhibit B, from Addendum 1, is included here for compliance. As per RFP instructions, the Service Questionnaire has been addressed within Tab E (Section 5.2) above. Pricing, in the format outlined within Exhibit B Cont'd is included in Tab F (Section 6) above.

Exhibit B
Page 36

Exhibit B is replaced in its entirety with the following page. No change to Exhibit B Cont'd.

EXHIBIT B
Service Questionnaire

Indicate the services you are able to provide:

SERVICE	YES	NO
Product Category #1	X	
Product Category #2		X
Product Category #3	X	
Product Category #4	X	
Product Category #5	X	
Product Category #6	X	

Respondents should address the following items in Tab D: Technical Proposal if they are applicable for the service(s) being proposed.

- Respondents are asked to identify services that they are able to provide.
- Respondents are not required to be able to respond to all services in order to provide a proposal to this RFP.
- Those Respondents that are capable of providing more than a single service, indicate which in the table above, and provide an individual narrative relating to the needs of each Bid Item as described in Exhibit A.
- Responses should consist of detailed descriptions of what a Respondent's firm is capable of providing to the TXSHARE Public Purchasing Cooperative. The narrative for each Product Category must be addressed, but Respondents are encouraged to provide additional detail about their operation and capabilities.

Exhibit B Cont'd
Pricing Proposal (Firm/Organization)

Respondents are to provide a rate chart for the labor categories/ skill sets outlined below. All rates should be presented as fully loaded hourly rates. Include any other cost categories that should be considered within the "other" category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation.

Pricing Format Request Example	Procurement No.:	NCT 2025-017
Respondent Name:		
Notes:	1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2025-017 2. Please provide hourly rates for **all** staff that would be involved in ERP Consultancy related projects. 3. Use as many lines as needed. 4. Detail any additional information necessary. 5. Proposers are encouraged to offer additional ERP Consulting functions or services to be offered as a catalog option. Please provide any additional options with 'list less' or 'cost plus percentages for pricing. A copy of any catalog services your firm can provide should be included with this response. If no such catalog exists, state "rates as submitted."	
	Enterprise Resource Planning Consultancy - SHARE Cooperative Purchasing Program	
Item	**Description**	**Offered Price**
1	Position Title	Specify Rate (Hourly)
2	Position Title	Specify Rate (Hourly)
3	Position Title	Specify Rate (Hourly)
4	Position Title	Specify Rate (Hourly)
5	Position Title	Specify Rate (Hourly)
6	Position Title	Specify Rate (Hourly)
7	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)
8	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)
Contractor shall provide additional Enterprise Resource Planning goods or services at cost plus:		**%**

RFP 2025-017

8.13 EXHIBIT C: SERVICE AREA DESIGNATION FORMS

EXHIBIT C

RFP 2025-017	**Texas Service Area Designation or Identification**		
Proposer Name:	ERP Analysts, Inc.		
Notes:	**Indicate in the appropriate box whether you are proposing to service the entire State of Texas**		
	Will service the entire State of Texas	Will not service the entire State of Texas	
	✓		
	If you are not proposing to service the entire State of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	**Region**	**Metropolitan Statistical Areas**	**Designated Service Area**
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands-Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

RFP 2025-017

RFP 2025-017	Nationwide Service Area Designation or Identification Form		
Proposer Name:	ERP Analysts, Inc.		
Notes:	Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.		
	Will service all Fifty (50) States	Will not service Fifty (50) States	
	✓		
	If you are not proposing to service to all Fifty (50) States, then designate on the form below the States that you will provide service to. By designating a State or States, you are certifying that you are willing and able to provide the proposed goods and services in those States. If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.		

Item	State	Region/MSA/City	Designated as a Service Area
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		
20.	Maryland		
21.	Massachusetts		

22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

9. APPENDIX A: RESUMES

9.1 KHATHERINE GAINES – DIRECTOR, WORKDAY HCM

Summary

Khatherine is a Consulting Director, HCM in the Workday practice at ERPA. She is recognized for the ability to build positive and collaborative relationships with colleagues and clients. Trusted leader, regarded for a proactive attitude and the ability to provide insightful ideas, innovative solutions, and drive customer success.

Specialties include Workday HCM, Talent & Performance, Recruiting, and Learning.

Relevant Experience

Khatherine has over 12 years of functional experience with Human Capital Management (HCM) software and implementations. She has more than 10 years of functional experience (5 of which were consulting) with Workday post-production support, phase x implementations, and implementations across a variety of industries and global markets.

Workday Leadership Roles

- Talent Architect
- HCM Architect
- Recruiting Architect
- Learning Architect
- Workday - Talent Product Lead Program

Workday Functional Roles

- HCM Lead
- Talent Lead
- Recruiting Lead
- Learning Lead

Representative Industries

- Energy
- Retail
- Textiles Manufacturing
- Lighting Manufacturing
- Investment Partners
- Video Game Development
- Insurance
- Gasoline Service Stations
- Hospitality
- Data Infrastructure Technology
- Marketing
- Higher Education
- Processed Food and Snacks
- Auto Parts
- Pharmaceuticals
- Brewing
- Healthcare

Workday Launch Experience

- **Launch deployments**: 4
- **Launch Express deployments:** 6

Skills

- **Software / Products:** Workday HCM, Workday Talent, Workday Recruiting, Workday Learning
- **General Tools:** Microsoft Word, Excel, PowerPoint

Professional Experience

Insurance Company – Phoenix, AZ
Role: Talent, Recruiting, HCM, and Learning Architect & Lead

Duties: Led the design workshops, solutioning, configuration, testing, and deployment of a successful Phase X implementation for both Talent and Learning modules. Provide post-production (AMS) consultancy and guidance with respect to Talent, Recruiting, HCM and Learning components: break-fix issues solutioning, change requests, and new product features released.

Offshore Services – Covington, LA
Role: Talent Architect & Lead and Learning Architect & Lead
Duties: Deploy Workday Talent Optimization and Workday Learning. Manage the workshops to facilitate architect & design. Provide configuration confirmation, demonstrations, testing support, cutover support, conduct deployment and post Go-Live support.

Government – Rochester, NY
Role: Talent Architect & Lead
Duties: Demonstrate and persuade the company to implement: Talent and Performance instead of using a paper process. Responsible for being the architect and configuration lead for Talent Optimization. Run the design workshops, solutioning, configuration, testing, and deployment of a successful phase x implementation.

Mental Health Service Provider – Bethlehem, PA
Role: Talent Architect
Duties: Design the Performance Review process across 4 different Centers of Excellence (CoEs) and take into account state-regulated processes. Led workshops to create a simplified, standard approach to performance reviews with minimum frequency.

Global Food Service Distributor – Camden, NJ
Role: Talent, Recruiting, and HCM Architect & Lead
Duties: Oversee and complete configurations for a divestiture initiative within the company. Consultancy and guidance with respect to Talent, Recruiting, and HCM components: break-fix issues solutioning, change requests, and new product features released over the course of the project.

Fitness Wear Retail Establishment - Vancouver, BC
Role: Talent Architect and Lead
Duties: Architect and complete configurations for annual “Grind” that involved updates to talent and performance review cycles, with partnership to advanced compensation.

Lighting Manufacturer – Coopersburg - PA
Role: Talent and HCM Architect & Lead
Duties: Demoed and persuaded the company to implement: Talent and Performance. Responsible for being the architect and configuration lead for Talent Optimization. Ran the design workshops, solutioning, configuration, testing, and deployment of a successful phase x implementation. HCM Lead for post-production issues and updates, providing analysis and evaluation of current configuration and providing recommendations for process improvements in Workday.

Private Equity Investment/Investment Management – New York, NY
Role: Recruiting and HCM Architect & Lead
Duties: Managed all aspects of post-production Recruiting and HCM configuration pertaining to updates and troubleshooting configured system setup data, consulted on final Workday business processes, and coached the client team on configuration. Held weekly meetings with client group.

Certifications & Associations

- Workday HCM Certification; Workday Talent Certification; Workday Recruiting Certification; Workday Learning Certification
- Workday Launch Certification

9.2 ALEX MAIDY – DIRECTOR, WORKDAY PAYROLL/ABSENCE/TIME TRACKING (PATT)

Summary

- Over eight (8) years of functional and architect experience with Workday Payroll, Absence, and Time Tracking implementations
- Over six (6) years of experience in leading, supporting, and optimization for higher education institutions via Phase 1, Phase X, and AMS projects.
- Lead consultancy roles in US Payroll, Canadian Payroll, Absence Management, Scheduling & Labor Optimization, and Time Tracking
- Involvement in the full software development life cycle from planning through to deployment, including business analysis to identify improvements, and hands on system configuration.
- Understanding of client requirements across multiple industries including Higher Education, Insurance, Global Manufacturing, Energy, Retail, and Telecommunications
- Alex has led projects in US Payroll, Canadian Payroll, Absence Management, and Time Tracking and has consulted on Workday Integrations and Scheduling/Labor Optimization projects for 8 years delivering quality implementation and post-production support expertise across a variety of industries and global markets. He has been involved in approximately 50 implementations to date.

Skills

- **Software / Products:** Workday HCM, Workday Payroll, Workday Absence, Workday Time Tracking, Workday Launch, Workday Talent
- **General Tools:** Microsoft Word, Excel, PowerPoint, Workday Studio
- **Other System Experience:** ADP, Paylocity, Java, AS400

Industry Experience

- **Large Deployments:** 50+ implementations via Paylocity
- **Quality Assurance: 250**+ deployment reviews via Paylocity
- **Small/Mid-Market Deployments:** 250+ implementations via Paylocity and ADP

Professional Experience

Industry: Higher Education
State university with multiple locations
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration for multiple campuses.
- Partnered with full platform team to deliver full suite deployment.

Industry: Higher Education
State university with multiple locations leading Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration for multiple campuses.
- Partnered with full platform team to deliver full suite deployment.

Industry: Higher Education
Private college leading Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Higher Education
Private university deploying Payroll, Absence, and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Higher Education
State college deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Higher Education
Regional state college deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Higher Education
State college optimizing Payroll, Absence and Time Tracking
Role: Payroll/Absence/Time Tracking Lead

- Assessed and optimized Payroll, Absence and Time Tracking configuration
- Partnered with full platform team to provide ongoing AMS support

Industry: Technology
Multinational Internet security company rolling out global absence and time tracking
Absence/Time Tracking Lead

- Designed, implemented, and delivered Absence and Time Tracking configuration for 21 countries.
- Managed via Launch approach.

Industry: Finance
Multinational holding company implementing full platform
Absence/Time Tracking Lead

- Designed, implemented, and delivered Absence and Time Tracking configuration for 5 countries.
- Served as support for US and CAN Payroll workstreams.

Industry: Manufacturing
Agriculture and food industry conglomerate deploying Payroll, Absence and Time Tracking
Payroll (CAN and US)/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Manufacturing
Automotive technology manufacturer deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Retail
Auto dealership group deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead

- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration

- Partnered with full platform team to deliver full suite deployment across Phase 2

Industry: Insurance
International brokerage deploying Payroll (CAN and US), Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Finance
Investment trading firm deploying Payroll (CAN and US), Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Healthcare
Regional hospital network deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.
- Industry: Nonprofit

Nonprofit education organization deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Manufacturing/Retail
Multinational beverage corporation deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Industry: Media
Mass media company deploying Payroll, Absence and Time Tracking
Payroll/Absence/Time Tracking Lead
- Designed, implemented, and delivered Payroll, Absence and Time Tracking configuration.
- Partnered with full platform team to deliver full suite deployment.

Education
- Bachelor’s degree in English/Secondary Education

Certifications
- Workday US Payroll/CAN Payroll Certification
- Workday Scheduling & Labor Optimization Certification
- Workday Absence Management Certification
- Workday Talent Certification
- Workday Time Tracking Certification
- Workday Launch Certification
- Workday Engagement Manager Certification
- Workday HCM Certification

9.3 JON MILKOVICH – DIRECTOR, WORKDAY FINANCIALS

Summary

Jon is the Director, Financials in the Workday practice at ERPA, and an experienced consultant and system administrator. Jon has been recognized as a trusted business advisor by leaders in the organizations he has worked for and been engaged. He is known for building strong relationships across departments and delivering exceptional results. Jon has a unique blend of Workday Financials consulting and self-implementation experience.

Jon has successfully led the implementation of Workday Financials for numerous companies across a variety of industries. Jon has had various Workday Financials project implementation roles on both the client side and the consulting side. During Jon's time as a Workday Financials consultant, he specialized in financial reporting and change management for energy, financial services, and healthcare clients. After Jon's initial stint in consulting, he managed and self-implemented multiple Phase 2 Workday Financials engagements and was a key member of a Phase X M&A Workday Financials implementation team.

Workday Leadership Roles

- Client Project Manager
- Banking and Settlement Architect
- Banking and Credit Card Integration Architect
- Budgets Architect
- Business Assets Architect
- Capital Projects Architect
- Customer Accounts Architect
- Customer Contracts Architect
- Expenses Architect
- Financial Accounting Architect
- Financial Data Model Architect
- Financial Reporting Architect
- Procurement Architect
- Project Billing Architect
- Supplier Accounts Architect
- Supplier Contracts Architect

Workday Functional Roles

- Banking and Settlement Lead
- Financial Reporting Lead
- Finance Change Management Lead

Representative Industries

- Energy
- Financials Services
- Healthcare
- Hospitality
- Professional Sports
- Professional Services
- Software Services

Professional Experience

Hospital System – Boston, MA
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Insurance Organization – Phoenix, AZ
Role: Financials Lead

Duties: Consultancy and guidance with respect to all areas within Workday Financials: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Public Multicampus Technical College – Waco, TX
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Financial Services Organization – Houston, TX
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Professional Services Organization – Dublin, OH
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials with an emphasis on PSA: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Higher Education Organization – Waco, TX
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Insurance Organization – Pheonix, AZ
Role: Financials Lead
Duties: Consultancy and guidance with respect to all areas within Workday Financials with an emphasis on Procurement/Expenses/Supplier Accounts: break-fix issues solutioning, change requests, reporting and new product features released over the course of the engagement.

Financial Services Organization – Phoenix, AZ
Roles: Project Leadership Team Member, Financial Reporting Lead, Banking and Settlement Lead, Workday Financials System Administrator

Duties: Work with internal and external project team to coordinate and manage Phase X M&A Workday Financials implementation delivery and deployment including business process design and configuration, security design, data conversion, integration coordination, and full functional services in the Workday product.

Led Banking and Settlement functional requirements, build and design for Phase X M&A Workday Financials implementation, including process analysis and evaluation and recommendations for business processes in Workday. Configured system setup data and consulted on final Workday business processes.

Led Financial Reporting requirements, build and design for Phase X M&A Workday Financials implementation. Led discovery sessions, report inventory collection and evaluation with recommendations for reporting deliverables in Workday.

Managed Workday Financials system updates and changes, including implementing additional Workday Financials functionality such as advanced intercompany configuration, sales and use tax accounts payable configuration, procurement card AMEX integration and verification process, supplier request process, supplier invoice request process, 1099 reporting processes, and miscellaneous payment request processes. Eliminated all Workday Financials third party application management support within one month of joining the organization.

Hospitality Company – Amorette, MO
Role: Finance Architect for the following functional areas: Financial Data Model, Financial Accounting, Business Assets, Capital Projects, Supplier Accounts, Expenses, Project Billing, Customer Accounts, Customer Contracts, Banking and Settlement, Financial Reporting; Banking and Credit Card Integration Architect; Change Management Lead

Duties: Led implementation, delivery and deployment including business process design and configuration, security design, data conversion, integration build, and full functional services in the Workday product.

Led functional area requirements, build and design for Phase X Implementation, including discovery sessions, process analysis and evaluation and recommendations for business processes in Workday. Configured system setup data, consulted on final Workday business processes, and coached the client team on configuration.

Professional Sports Team – Kansas City, MO
Role: Finance Architect for the following functional areas: Financial Data Model, Financial Accounting, Business Assets, Capital Projects, Supplier Accounts, Supplier Contracts, Expenses, Project Billing, Customer Accounts, Customer Contracts, Banking and Settlement, Budgets, Financial Reporting; Banking and Credit Card Integration Architect; Change Management Lead

Duties: Led implementation, delivery and deployment including business process design and configuration, security design, data conversion, integration build, and full functional services in the Workday product.

Led functional area requirements, build and design for Phase X Implementation, including discovery sessions, process analysis and evaluation and recommendations for business processes in Workday. Configured system setup data, consulted on final Workday business processes, and coached the client team on configuration.

Management Holding Company – Leawood, KS
Role: Finance Architect for the following functional areas: Financial Data Model, Financial Accounting, Business Assets, Capital Projects, Supplier Accounts, Supplier Contracts, Expenses, Project Billing, Customer Accounts, Customer Contracts, Banking and Settlement, Budgets, Financial Reporting; Banking and Credit Card Integration Architect; Change Management Lead

Duties: Led implementation, delivery and deployment including business process design and configuration, security design, data conversion, integration build, and full functional services in the Workday product.

Led functional area requirements, build and design for Phase X Implementation, including discovery sessions, process analysis and evaluation and recommendations for business processes in Workday. Configured system setup data, consulted on final Workday business processes, and coached the client team on configuration.

Software Company – Kansas City, MO
Role: Project Manager; Finance Lead for the following functional areas: Financial Data Model, Financial Accounting, Business Assets, Supplier Accounts, Expenses, Customer Accounts, Banking and Settlement; Financial Reporting Architect; Change Management Lead

Duties: Oversee project team to coordinate and manage Financials Phase X Implementation delivery and deployment including business process design and configuration, security design, data conversion, integration coordination, and full functional services in the Workday product.

Led functional area requirements and design for Phase X Implementation, including discovery sessions, process analysis and evaluation and recommendations for business processes in Workday.

Hospital System – Newark, DE
Role: Financial Reporting Architect
Duties: Overseeing project team to coordinate and manage Phase 2 Implementation delivery and deployment including report build and security design.

Led Financial Reporting requirements, build and design for Phase 2 Workday Financials implementation. Led discovery sessions, report inventory collection and evaluation with recommendations for reporting deliverables in Workday. Created reports and coached team on report maintenance.

Independent Energy Producer – Allentown, PA
Role: Financial Reporting Architect
Duties: Overseeing project team to coordinate and manage Phase 1 Implementation delivery and deployment including report build and security design.

Led Financial Reporting requirements, build and design for Phase 1 Workday Financials implementation. Led discovery sessions, report inventory collection and evaluation with recommendations for reporting deliverables in Workday. Created reports and coached team on report maintenance.

Financial Services Organization – San Antonio, TX
Role: Finance Change Management Lead
Duties: Led change impact and stakeholder assessments, developed change mitigation strategies, training strategies and training curriculum and for Phase 1 Workday Financials implementation.

Private Investment Firm – Boston, MA
Role: Financials Consultant
Duties: Assisted in design, build and testing phases for Phase 2 Workday Financials implementation. Assisted in process analysis and evaluation and recommendations for business processes in Workday. Configured system setup data, built custom reports, consulted on final Workday business processes.

Education, Licenses and Certifications

- BS, Finance – University of Kansas; MBA, Entrepreneurship – University of Missouri-Kansas City
- Workday Record to Report Certification
- Workday Supply Chain Management Certification
- Workday Strategic Sourcing Certification
- Workday Accounting Center Certification
- Workday Advanced Reporting Certification
- Workday Composite Reporting Certification
- Workday Dashboard Certification
- Workday Financials Pro Certification
- Workday Financial Reporting Pro Certification
- Workday Record to Report Certification
- Workday Supply Chain Management Certification
- Workday Strategic Sourcing Certification
- Workday Accounting Center Certification
- Workday Launch Certification
- Workday Advanced Reporting Certification (2016 – 2017)

- Workday Composite Reporting Certification (2014 – 2017)
- Workday Custom Dashboard Reporting Certification (2016 – 2017)
- Workday Financials Pro Certification (2018 – 2021)
- Workday Financials Reporting Pro Certification (2017 – 2021)

9.4 RIO RAMON – DIRECTOR, WORKDAY INTEGRATIONS

Summary

Rio has been working in the consulting industry for over 20 years. For the last 11 years he has been working in Workday solutioning for various clients both domestically and abroad. As the practice lead, he has directed projects and managed professional services teams. Manages solution delivery for high tech, financial services, manufacturing and telecommunication industries. Focused on budgeting, forecasting, problem-solving, planning, developing and providing support to customers.

Relevant Experience

Rio has led Workday Integration, Third Party Payroll Integration, and Project Management for 11 years, delivering quality implementation and post-production support across various industries and global markets. He has served as an Integration and/or lead consultant in more than ten implementations to date. Additionally, Rio has a leadership role across various organizational initiatives, including mentoring new hires, Internal training, and leading implementation teams.

Workday Leadership Roles

- Director of a Workday practice
- Integration Architect
- Third Party Payroll Integration

Workday Integration Roles

- Architect
- Integration Lead

Workday Lead Developer

Certifications & Associations

- Workday Integration Certification
- Workday CCB Certification

System Experience

- Software / Products: Workday HCM/FINs, Workday CCBs
- General Tools: Microsoft Word, Excel, PowerPoint

Professional Experience

Healthcare Technology Company
Role: Manager, Integration Architect
Duties: Collaborate with support team to assist client stakeholders with emergent technical issues and develop effective solutions. Lead the Integration AMS Support team to make sure that the quality solutions are delivered by the team. Manage Workday configuration including incident management processes. Work with agile/iterative software development methodologies. Work as Workday Integration Architect and SME for new development work.

Multinational Manufacturing Company
Role: Integration Architect
Duties: Engaged in requirement collection, analysis, and crafting technical blueprints, along with developing test case documentation for this implementation endeavor. Oversee the complete integration

process of third-party payroll. Integrated third-party payroll (ADP) within the Workday framework. Assumed the role of Integration Lead for Workday Human Capital Management (HCM) integration.

Software Services
Role: Integration Specialist and Lead
Duties: Oversee project team to coordinate and manage full External Payroll Integration Implementation across 10 countries, encompassing 21 integrations. Utilized GPC (Global Payroll Connector) and custom transformations within PECI (Payroll Extract Connectivity Interface) to facilitate this process. Configured Integration and involved in end-to-end testing and post go live support.

Healthcare Technology Company
Role: Integration Architect
Duties: Oversee project team to coordinate and manage implementation delivery for integrating External Workforce Management into Workday, interfacing with Vendor Management, Finance, and Identity and Access Management systems. This role involved interacting with cross-functional project teams, developing and monitoring comprehensive project plans, ensuring alignment on goals and timelines, and maintaining clear communication with stakeholders and vendors.

Healthcare
Role: Lead Integration Developer
Duties: Served as the lead developer. This involved designing, developing, and implementing tailored solutions to meet the unique requirements of managing protected cases, ensuring robust security measures, and enhancing functionality. Collaborated closely with cross-functional teams to gather requirements, troubleshoot issues, and deliver a high-quality, user-friendly application that significantly improved case management processes.

Software Services
Role: Lead Integration Developer
Duties: Served as the lead developer, responsible for overseeing the entire process of integrating time tracking and absence data. This role included collecting and analyzing requirements, crafting detailed technical blueprints, and developing comprehensive test case documentation to ensure a successful implementation. Additionally, I collaborated with cross-functional teams to ensure alignment and addressed any technical challenges that arose during the project.

9.5 MURTHY SURAVARAPU – AVP, CLOUD ARCHITECT & AUTOMATION LEAD

Summary

- Early adopter of cloud technology, steered the organization goals from on prem data center migrations to AWS Cloud
- Handled successful transition of Oracle, Peoplesoft ERP, SOA, Fusion middleware applications to AWS Cloud f or Big Pharma/Higher Ed clients
- Created customer driven operational excellence in a highly complex managed hosting environment
- Promoted transformational practices toward highly scalable and resilient cloud deployments leveraging infrastructure-as-code, containers, and serverless

Skills

- **AWS Skills:** E C2/S3/VPC/IAM/Cloud Formation/Lambda CloudWatch/Auto Scaling/EFS/ELB/Route 53/ Cloud Trial/SES/Terraform Cloud
- **OS:** Solaris, RHEL, Ubuntu, OEL
- **Application Skills:** Peoplesoft Tools, Tuxedo, WebLogic, Fusion Middleware, SOA Suite /OSB Autosys, Phire, Touchnet, CyberSource
- **Languages:** Python, Shell scripts, Baan
- **Databases:** Oracle 12g/11g, Aurora PostgreSQL 11/12

Professional Experience

ERP Analysts, Inc. — **Mar 2021 - Current**
AVP, Architecture & DevOps

- Design resilient, highly available, self-healing and security compliant architectures for Peoplesoft Applications and Data center migrations
- Designed and architected the ERPA proprietary automation and automation tool ActiveGenie™
- Centralized operations and automation management across all clients hosted on AWS
- Provided key technical inputs in securing the AWS advanced partnership in Data center migrations and Peoplesoft workloads migration to AWS
- Worked with AWS team to secure a Foundational Technical Review of ActiveGenie™
- Designed infrastructure build automation & orchestration platform using Terraform, enabling faster client transitions to AWS hosting
- Identified and automated several Peoplesoft Administrative activities like installs/configurations and patching using ActiveGenie™
- Work with clients to design and develop their specific security, compliance, backup, retention requirements and DR strategies

Commonwealth Informatics (A Genpact Company) — **Dec 2020 – Jun 2021**
Director – SaaS Solutions

Commonwealth Informatics (a Genpact Company) is a global provider of cloud-based analytics products and services for medical research and healthcare delivery. Pharmaceutical and biotechnology companies, government regulatory agencies.

- Supported AWS Infrastructure for several Big Pharma Industries
- Implemented cost saving mechanisms saving 30% i n monthly AWS billing
- Increased operational efficiency by 60% by automating the manual processes using Lambda/Code build
- Centralized operations and automation management, saving several hours of migrating/versioning each automation to multiple accounts
- worked in a Global service delivery team on automated playbook development for application installs trimming the application install time from 2 days to 2 hours

- Developed automated Application monitoring and ticket notification process for faster response to downtime events
- Designed a Log rotation/retention mechanism to meet client SLA
- Evaluated infrastructure build using Terraform Cloud Vs Cloud formation
- Reduced on-boarding process time f or new clients by 70% utilizing CF Templates
- Implemented environment level isolation by employing Network ACLs and Security groups
- Worked with Tech sales team to provide costing calculations f or hosting CVW applications on AWS

Sierra-Cedar Inc. Jan 2016 – Nov 2020
Project: Peoplesoft Migrations to AWS
Solutions/Integration Architect
AWS Education Competency Partner

Sierra-Cedar (formerly Cedar Crestone) is a managed service company hosting Oracle Products for various clients around the world. The company hosts around 50 Peoplesoft clients and provides remote support for another 40 clients. The client base includes Major Universities, financial Institutions, placement services

- Migrated 10 Peoplesoft and Fusion Middleware applications to Cloud f or Ivy League higher education institutions, financial sector, government, and commercial clients delivering 500% ROI over 5 Years
- Designed resilient, highly available, self-healing and security compliant architectures for Peoplesoft Applications
- Designed infrastructure build automation & orchestration platform using Terraform enabling f aster client transitions to AWS hosting
- Engaged with the sales team to present cost-effective managed service offerings for AWS hosting increasing sales pipeline
- Designed security and governance guardrails for operations teams to avoid expensive security incidents and breaches
- Tested and designed autoscaling models for various workloads. The prebaked autoscaling models reduced the prep work required f or the Higher Ed enrollment process by 50%
- Designed a dynamic architecture framework to host third party applications that integrate with Peoplesoft saving time f or rearchitecting each application
- Migrated Peoplesoft applications from RHEL EC2 to ECS on Amazon Linux EC2, giving 25% cost savings to client on RHEL licensing
- Orchestrated automated password rotation process using Lambdas/code build & AWS Secrets replacing the laborious password rotation, saving 40-man hours every month
- Designed the methodology to create and route Remedy tickets from CloudWatch Alarms, which helped the ops team with f aster responses to client issues
- Designed several ECS container definitions to f or Peoplesoft web/app/process scheduler containers
- Performed POC of Peoplesoft i n Windows/SQL server/FSX/AD architecture enabling faster transition to hosting of Peoplesoft clients on MS SQL server
- Standardized application log management with CloudWatch, Kinesis streams to splunk
- Designed backup and recovery management to meet SLA
- Developed self-service modules f or customizations deployment and management resulting in faster deployments

Sierra-Cedar Inc. Aug 2013 - Dec 2015
Project: Peoplesoft Migrations to Managed Hosting
Technical Manager -Special Projects

- Handled the transition of clients from on-premise to Sierra-Cedar data center for managed hosting
- Worked with a team of Peoplesoft administrators/PMO/client for successful transition of clients till go-live
- Studying the clients existing architecture and identifying the gaps between client architecture and Sierra standard Architecture f or Peoplesoft/SOA suite
- Web app server Capacity planning f or Peoplesoft based on client user concurrency
- Implemented third party tools that integrate with Peoplesoft like Phire / Autosys
- Re-architected the process of changing ADMSYS passwords and application passwords in 500 Peoplesoft databases
- Performed POC with new People Tools releases identified the gaps in current standards
- Working with Unix team to develop RPM packages f or every new Peoplesoft/SOA/OSB releases
- Development of automatic build process f or Peoplesoft components
- Installed/Configured and set standards around implementing Oracle Secure Elasticsearch
- Migrated of 40 clients on various People Tools releases from OEL 5 → OEL 6
- Developed the methodology f or load testing the production Architecture before go-live
- Planned infrastructure required f or University clients f or the enrollment period

Sierra-Cedar Inc. Aug 2007- Jul 2013
Team Lead PSA Operations

- Lead a team of Peoplesoft Admin operations supporting 70 production environments and around 440 non-production Peoplesoft environments
- Provided technical guidance and mentoring team members on day-to-day operations and issue resolution
- Installing, configuring and documenting the process for third party tools like Phire, Touchnet, CyberSource
- Supported migration of Peoplesoft from Solaris 10 to OEL 5.0.
- Configured dedicated pubsub server setup to route each queue on a dedicated server
- Supported monthly maintenance windows f or patching and upgrades
- In a hosted environment the volume of work is very high.
- The following are my contributions to the team to improve efficiency.
  - Converted individual WebLogic home to shared WebLogic home per server.
  - This reduced the install times and WebLogic patching time considerably.
  - Converted multi server WebLogic to single server WebLogic
  - Converted local java_home to shared JDK/JRE reducing the JDK/JRE patching time
  - Configured dedicated app messaging gateway and report node gateway setup for jumbo clients to reduce the configuration and troubleshooting time

Peoplesoft Administrator Sep 2000 – Jul 2007
Contractor for Various Clients (Employer: Numbers only Inc.)

Sennac Interim Results – The Netherlands Oct 1998 – Jul 2000
BaaN programmer

KSB Pumps Limited – Secunderabad, India Aug 1993 – Mar 1997
Technical Support Engineer

9.6 SEAN LOVE – VP, DELIVERY (PEOPLESOFT)

Summary

Sean is an accomplished IT professional with over twenty years of PeopleSoft experience in both domestic and international implementations. Responsibilities have included all aspects of the system life cycle: requirements definition, fit/gap analysis, business process design, build, testing design and execution, training, implementation, and production support.

Professional Experience

Project Manager

Client: City of Boston (Boston, MA)
Project: PeopleSoft HCM and Financials AWS Migration, PeopleTools Upgrade, and Financials Application Upgrade (9.1 to 9.2)

- Developed and rolled out Project Management toolset using Smartsheet.
- Worked with client to develop and deliver kick-off presentations to both the Steering Committee and project team.
- Represented both ERPA and client interests on the project until approximately 3 months into project when a client Project Manager was added to the team.
- Facilitated regular communication between City of Boston and ERPA Center of Excellence resources.
- Performed regular status reporting at multiple project levels, i.e., internal ERPA, joint ERPA/Boston, and Steering Committee.
- Established All Hands communication structure to keep extended stakeholders engaged in project.

Project Manager/PeopleSoft Functional Lead

Client: University of Utah (Salt Lake City, UT)
Project: Oracle Student Management Cloud

- Managed implementation of Oracle Student Management Cloud (SMC) for the University of Utah Continuing Education group.
- Facilitated shared development with another client implementing SMC at the same time.
- Assisted with the functional design of integration between SMC and PeopleSoft Financials.
- Regularly monitored and escalated critical and blocker issues to Oracle on behalf of the University.
- Maintained positive working relationship with client even when faced with severe system limitations which resulted in the delay of project go-live.

Client: City of Hope (Los Angeles, CA)
Project: PeopleSoft 9.2 Upgrade

- In November 2019, client decided to replace vendor Project Manager
- Rapidly came up to speed in the middle of System Integration Testing Cycle 1. Worked with project leadership to revise project plan, testing approach, and other aspects of the project that had previously resulted in client dissatisfaction.
- Assessed status of remaining open development and quality of testing. Ultimately recommended to project leadership that team was unlikely to meet planned go-live date.
- Coordinated project replan, including addition of second System Integration Testing cycle (SIT 2).
- Led development of cutover migration plan which included coordination of functional, technical, and infrastructure teams, along with end users for post live system validation.
- Assisted in preparation of weekly status report, Steering Committee presentations and bi-weekly project stakeholder updates.
- Reorganized weekly team status meetings to make them more useful tool for managing project and facilitating cross-team coordination.

- Received positive feedback from client leadership and project team that my addition to the project was a significant improvement and that it contributed to the project's turnaround.

Client: Alberta Health Services (Calgary, AB Canada)
Project: PeopleSoft 9.2 Upgrade

- Alberta Health Services (AHS) provides healthcare for the entire province of Alberta, Canada and has over 120,000 employees.
- AHS engaged in a project to upgrade from version 8.8 to 9.2. Project included a double-hop upgrade from PS 8.8 to 9.1 and 9.1 to 9.2, two PeopleTools upgrades, a significant amount of custom data conversion, and an in-housing of system architecture from hosting vendor.
- Client decided to replace both client and consulting project managers in the middle of the project and at nearly the same time. I joined client toward the end of the Development phase (mid-April) and had to quickly get up to speed.
- New client project manager resigned after approximately 4 months, leaving me as the primary PM for the project.
- Led client through replanning when it became apparent that go-live date was not achievable. Replanning efforts culminated in team-wide meeting with 50+ participants across all project teams.
- Worked with client to manage project impacts from multiple competing initiatives, e.g. the addition of a new company into the Production system, a Taleo upgrade, and business-as-usual operations.
- Navigated a complex project organizational and reporting structure. As an example, Steering Committee meetings were required every two weeks and were two hours in duration.
- Led client through remainder of Development, Testing (3 System Integration Testing cycles, 1 User Acceptance Testing cycle, 1 Year-End Testing cycle, and 1 Payroll Simulation Testing cycle), Pre-Cutover, Cutover, and Post-Implementation Support phases.
- AHS went through over 8 project managers over the course of the project. Overall team included well over 200 people including consultants and client.

Client: Quest Diagnostics (Long-term client > 9 years)
Project: PeopleSoft 9.2 Upgrade

- Managed team of 2 functional leads, 1 upgrade specialist, and 10 developers in a project to upgrade from PeopleSoft 9.1 to 9.2 (Image 25). Project also included a Tools upgrade from 8.52.07 to 8.55.18 and an upgrade from Oracle 11g to 12c. Project included over 600 "customizations" with thousands of impacted PeopleSoft and external file objects.
- Coordinated with client project manager and other client team members as appropriate, e.g., infrastructure, DBA, business users, etc.
- Regularly reported status to client project leadership.
- Coordinated Production support activities post-go-live for defect remediation. Utilized QA Complete tool for this purpose.
- Oversaw transition to PUM methodology, coordinating knowledge transfer between Upgrade Specialist and client PeopleSoft Admin for ongoing bug-fix maintenance.

Client: Educational Testing Services
Project: PeopleSoft 9.1 FSCM Enhancement

- Client did not want to use PeopleSoft Excel-to-CI functionality for uploading vouchers as it was too cumbersome a tool.
- Worked with client to define requirements for a custom upload tool.
- Developed functional specifications and worked with developer to develop and unit test new tool.
- Developed training material and coordinated end-user testing.
- Provided Production support once tool was rolled out to end-users.

Client: Q² Solutions (a joint venture between Quintiles and Quest Diagnostics)
Project: PeopleSoft 9.2 FSCM Implementation – Project Manager

- Managed team of 3 functional leads and 6 developers in a project that integrated the business processes of two companies into a new joint venture.
- Coordinated efforts with users in California, Atlanta, London, and Edinburgh.
- Developed, maintained, and managed project plan. Coordinated with PMO and overall IT Project Management regarding related projects under the joint venture umbrella.
- Assisted functional leads in areas of Projects, Contracts, Accounts Receivable, Billing, Order Management, Manufacturing, and Inventory.
- Served as one of primary liaisons between Quest Diagnostics and Quintiles given my 10-year history with Quest Diagnostics users and my familiarity with their systems and business processes.

Client: Navigant Consulting
Project: PeopleSoft 9.2 FSCM Implementation – Testing Coordination

- Joined project in role of testing coordinator. Organized existing testing materials and developed a dashboard for daily reporting of testing metrics.
- Assumed ownership of the testing defect log. Coordinated with project management, functional leads, and developers to push the timely resolution of over 500 defects.
- Assisted with defect resolution as time permitted.
- Led separate daily meetings with functional leads, developers, and testers to help keep the testing schedule on-track.

Client: Asplundh
Project: PeopleSoft 9.2 FSCM Implementation – Australia / New Zealand

- Replaced resource as functional lead for Accounts Receivable/Billing modules and co-lead for Project Costing/Contracts modules late in the project.
- Addressed a number of deficiencies in the project, e.g. conversion (customers, contacts, open AR balances, and project rate sets), month-end reconciliation, VAT reporting, invoice layout design, and security.
- Documented key PeopleSoft Contracts-to-Cash business processes and trained users.
- Reviewed and updated VAT configuration for Australia and New Zealand Business Units and documented month-end VAT reporting procedures.
- Developed and worked with users to execute testing/training plan.

Client: Quest Diagnostics (Long-term client > 9 years)
Project: PeopleSoft 9.1 HCM Enhancements initiative

- Was asked to take over project management responsibilities for a series of HCM enhancements coinciding with the centralization of HR functions into a Service Center model.
- Project was responsible for delivering over 20 enhancements ranging from simplified page modifications to complex health vendor interfaces for things such as health and 401(k) benefits, Cobra/HIPAA, life insurance, and dependent verification.
- Developed and maintained project plan over duration of project.
- Coordinated with project sponsor and business owners to roll out functionality in a series of releases designed to minimize disruption to business users.
- Coordinated testing activities for all enhancements with the appropriate end-users. Tracked all testing documentation for project audit purposes.
- Developed pre-go-live checklists and implementation plans for each release to ensure enhancements were ready to move into Production.
- Monitored project spend against budget and assisted client in planning for future phases of the project.

Project: PeopleSoft 9.1 Supply Planning implementation

- Served as project manager for initiative to implement custom forecasting functionality for client clinical trial testing kits as well as to implement PeopleSoft's Supply Planning module to support resupply of kit components.
- Developed and maintained project plan over duration of project.
- Led weekly project team status meetings and regularly reported project status to Project Office and Steering Committee groups.
- Coordinated resources on US East and West Coasts as well as in United Kingdom.
- Project resulted in delivery of competitive advantage-providing functionality to automatically replenish client clinical testing supplies.

Project: PeopleSoft Financials 9.1 upgrade

- Served as project manager for initiative to upgrade from version 9.0 to 9.1 FP2. Impacted modules: AM, AP, AR, BI, GL, IN, MFG, OM, and PO. Project included nearly 600 "customizations" (over 25,000 customized objects), interfaces, and reports.
- Developed and maintained project plan over duration of project.
- Utilized Agile Scrum methodology to accelerate development efforts to meet required timeline.
- Coordinated activities of functional, technical, and infrastructure teams. Managed both ESG and client resources.
- Led weekly project team status meetings and provided upward feedback to Project Office and Steering Committee groups.

Education/Certifications/Training

- B.S., Business Administration, University of Florida
- Certified Oracle Cloud PM Practitioner
- PeopleSoft Financials: Accounts Receivable/Billing (12 yrs.), Accounts Payable, General Ledger, Order Management, Inventory (2 yrs.), Project Costing, Contracts, Manufacturing (1 yr),
- PeopleSoft HCM: Time & Labor (1 yr)
- PeopleTools: Application Designer, SQL/SQR, Security Administrator, BI Publisher, Query
- Project Management: 12 years' experience across multiple clients/projects
- Agile Scrum Master training/certification