

SAN MARCOS UNIFIED SCHOOL DISTRICT

Services Agreement

BID NUMBER2026-15

HUMAN RESOURCES DATABASE SYSTEM FOR SAN MARCOS USD

Bid Opening: 4:00 pm on November 18, 2026

at the

San Marcos Unified School District
Child Nutrition Services Department
255 Pico Avenue, Suite 250
San Marcos, CA 92069

RESPONSES MUST BE SUBMITTED ELECTRONICALLY TO:

<https://secure.procurenow.com/portal/smusd>

TABLE OF CONTENTS

1. Introduction
2. Notice to Bidders
3. Instructions to Bidders
4. Special Conditions
5. Specifications & Proposal Requirements
6. Pricing Proposal
7. Vendor Questionnaire

Introduction

1. Summary

The San Marcos Unified School District (SMUSD) invites interested organizations and qualified entities to submit proposals for 2026-15, Human Resources Database System for San Marcos USD. This solicitation is for the 2026-27 & 2027-28.

2. Timeline

Release Project Date:	October 19, 2026
Question Submission Deadline:	November 6, 2026, 4:00pm
Final Addendum Issued:	November 13, 2026, 4:00pm
Response Submission Deadline:	November 18, 2026, 4:00pm
Evaluation #1 Results :	November 30, 2026
Interviews of Top Vendors (optional):	December 16, 2026, 8:30am San Marcos Unified School District Business Services Conference Room 255 Pico Ave, STE 250 San Marcos, CA 92069
Evaluation #2 Results:	December 21, 2026
Intent to Award:	December 21, 2026
Board Award of Project:	January 14, 2027

3. Bid and Project Contact

Bid document contact for this project:

Bid Contact: Nick Brizeno, Director, Purchasing

Email: nick.brizeno@smusd.org

All questions to be submitted through the eProcurement platform. Any questions emailed direct to the above contact will not be considered as a request for information, and will not be responded to.

Project contact for this project:

SAN MARCOS UNIFIED SCHOOL DISTRICT BID #2026-15

Project Coordinator: Aurora Campos, Administrative Assistant II

Project Coordinator Email: aurora.campos@smusd.org

Additional contacts for this project: (optional)

Consultant Contact: N/A

Company Name: N/A

Contact email: N/A

Notice to Bidders

In accordance with Public Contract Code 20111, NOTICE IS HEREBY GIVEN THAT the Board of Trustees of the San Marcos Unified School District, County of San Diego, State of California, invite and will receive sealed proposals for the award of Bid 2026-15 for Human Resources Database System for San Marcos USD up to but no later than Wednesday, November 18, 2026 by 4:00 pm via the district's eProcurement Portal.

Only electronic bid submittals will be accepted.

All bidders must register with OpenGov to participate in this bid by visiting SMUSD's eProcurement Portal which can be accessed by visiting <https://www.smusd.org/departments/Purchasing/bids>

Bids shall be made on forms prepared via the district's eProcurement Portal. Only ELECTRONIC BID SUBMITTALS will be accepted. Bid forms, specifications and further information is available via the eProcurement Portal. Questions shall also be submitted via the portal.

The District reserves the right to accept or reject any or all proposals, or any combination of proposals, and to waive any irregularities or informalities which may be legally waived.

Contact for Bid: Nick Brizeno, Director, Purchasing, nick.brizeno@smusd.org

Publication: Daily Transcript Journal

Dates Published: 10/19/2026 & 10/26/2026

Instructions to Bidders

1. San Marcos Unified School District

Specifications and/or Drawings are available via the district's eProcurement Portal. **Only electronic bid submittals will be accepted.** Hard copies will be returned.

Bid Proposal:

No bid proposals shall receive consideration by the district unless made in accordance with the following instructions:

2. Deadline for Receipt of Proposals

Bid proposals must be submitted to the Purchasing Department via the district's eProcurement Portal. All bids must be received on or prior to 4:00 pm on Wednesday, November 18, 2026, after which bids will be unsealed.

3. Request for Information

Any questions relative to the bid should be directed via the district's eProcurement Portal. Questions are due by 4:00 pm on Friday, November 6, 2026.

4. Proposal Forms

Bid proposals must be made on a form included in this bid packet. All items on the form should be filled out to be considered as responsive. Numbers should be stated in figures.

5. Attestations and Confirmations

Each bidder must confirm all items in the "Vendor Questionnaire" to be considered responsive and responsible bidder.

6. Clarifications

Questions regarding documents, discrepancies, omissions or doubt as to meanings will be clarified by the designee of the District Superintendent.

7. Withdrawal of Bid Proposals

Bid proposals may be withdrawn by the bidders prior to the time fixed for the opening of bids via the district's eProcurement Portal, but may not be withdrawn for a period of Forty Five (45) days after the opening of bids. A successful bidder shall not be relieved of the bid submitted without the District's consent or bidder's recourse to Public Contract Code Section 5100 et. seq.

8. Addenda or Bulletins

Any addenda or bulletins issued during the time of bidding shall form a part of the drawings and specifications issued to bidders for the preparation of their proposals and shall constitute a part of the contract documents.

9. Award of Contract

The District reserves the right to reject any and all bid proposals, to contract work with whomever and in whatever manner the District decides, to abandon the work entirely and to waive any informality or non-substantive irregularity as the interest of the District may require. The District reserves the right to award this bid by line item, or by category, or in total which ever may be in the best interest of the District.

10. Evidence of Responsibility

Upon the request of the District, a bidder shall submit promptly to the District satisfactory evidence showing the bidder's financial resources, the bidder's experience in the type of work being required by the District, the bidder's organization available for the performance of the contract and any other required evidence of the bidder's qualifications to perform the proposed contract. The District may consider such evidence before making its decision awarding the proposed contract. Failure to submit evidence of a bidder's responsibility to perform the proposed contract may result in rejection of the bid.

11. Rejection of Bids

The District reserves the right to accept or reject any and all bids, or any portion or combination thereof, or award on the basis of the total bid.

12. Taxes

Taxes shall NOT be included in the unit prices of the materials, but may be provided as part of the Cost Analysis. The District will pay only the State sales and use taxes. Federal excise taxes are not applicable to school districts.

13. Bid Exception

All exceptions which are taken in response to this bid must be stated clearly. The taking of bid exceptions or providing false, incomplete or unresponsive statements may result in the disqualification of the bid. Allowance of exceptions will be determined by the Board of Trustees, whose decisions shall be final. Any bid exceptions or additional conditions requested after bid closure, which are not detailed within the bid response, may result in disqualification of the bid. No oral or telephonic modification of any bid submitted will be considered and a telegraphic modification may be considered only if the postmark evidences that a confirmation of the telegram duly signed by the bidder was placed in the mail prior to the opening of the bids.

14. Discounts

Any discount which the bidder desires to provide the District must be stated clearly on the bid form itself so that the District can calculate properly the net cost of the bid proposal. Offers of discounts or additional services not delineated on the bid form will not be considered by the District in the determination of the lowest responsible bidder.

15. Prices

Bidders must quote prices F.O.B. San Marcos Unified School District unless otherwise noted. Prices should be stated in the units specified and bidders should quote each item separately.

16. Quantities

The quantities shown are approximate. The District reserves the right to increase or decrease quantities as desired.

17. Container Costs and Delivery

All costs for containers shall be borne by the bidder. All products shall conform to the provisions set forth in the federal, county, state and city laws for their production, handling, processing and labeling. Packages shall be so constructed to insure safe transportation to point of delivery.

18. Bid Negotiations

A bid response to any specific item of this bid with terms such as negotiable, will negotiate or similar, will be considered as non-compliance with that specific term.

19. Indemnity / Hold Harmless

The successful vendor agrees to defend and hold harmless the District, its Governing Board, officers, directors, agents, employees, and independent contractors, individually and collectively, from and against all costs, expenses, losses, claims, demands, suits actions, payments, judgments (including legal and attorney fees), or other liabilities of any nature, arising from death, personal or bodily injuries, property damage or otherwise, however caused, brought or recovered against any of the above-named persons that (a) occur in connection with the performance of the professional services set forth herein by the successful vendor or any of its officers, employees, agents, or subcontractors; or (b) arise from any act, omission, or breach by the successful vendor or any of its officers, employees, agents, or subcontractors in connection with the professional services set forth herein. The successful vendor further agrees to provide a Certificate of Insurance for liability coverage and limits acceptable to the District.

20. Conflict of Ambiguity

In the event of any conflict or ambiguity between these instructions and state or federal law or regulations, the latter shall prevail. Additionally, all equipment to be supplied or services to be performed under the bid proposal shall conform to all applicable requirements of local, state and federal law.

21. Substitute Security

In accordance with Section 4590 of the Government Code, the District will permit the substitution of securities for any moneys withheld by the District to insure performance under the contract. At the request and expense of the bidder, securities equivalent to the amount withheld shall be deposited with the District, or with a state or federally chartered bank as an escrow agent, who shall pay such moneys to the bidder upon satisfactory completion of the contract. Securities eligible for investment under this Section shall include those listed in Government Code Section 16430 or bank and savings and loan certificates of deposit. The bidder shall be the beneficial owner of any securities substituted for moneys withheld and shall receive any interest thereon.

22. Default

If the bidder defaults, the District may procure the articles or services from other sources and may recover the loss occasioned thereby from any unpaid balance due the bidder or by proceeding against a bidder's bond, if any, or by suit against the bidder. The prices paid by the District shall be considered the prevailing market prices at the time such purchase is made.

23. Governing Law

In the event of litigation, the bid documents, specifications and related matter shall be governed by and construed in accordance with the laws of the State of California. Venue shall be with the appropriate state or federal court located in San Diego County.

24. Delivery Deadline

The equipment/materials sought by this bid proposal must be delivered in satisfactory condition to the location specified by the District in the bid proposal on or before delivery time as indicated by vendor. This time limit is of the essence of the contract. A bidder's failure to provide the equipment/materials to the District by the contract date shall subject the bidder to liquidated damages in the amount of NO VALUE for each and every calendar day by which completion is delayed beyond the contract date.

Submission of a bid proposal constitutes the bidder's promise to pay liquidated damages as set forth above and the bidders agreement that the actual occurrence of damages and the actual amount of damages which the District would suffer if the requirements were not completed by the contract date is impracticable and extremely difficult to fix. Damages which the District would suffer in the event of delay are dependent on many circumstances and factors but would include the loss of use of the materials, disruption of school activities, cost of administration and supervision, and the loss suffered by the public and the District by reason of delay in completion of the contract. Accordingly, bidder agrees that the amount set forth herein as liquidated damages shall be presumed to be the amount of damages actually sustained by the bidder's failure to complete the project by the contract date.

If the bidder becomes liable to the District for liquidated damages, the District shall, in addition to all other remedies provided by law, have the right to deduct the amount of liquidated damages owed from the contract sum or to deduct the amount of liquidated damages owed by the bidder from moneys previously retained from the bidder. If the sum deducted by the District is insufficient to discharge the bidder's liability for liquidated damages, the bidder and its sureties shall remain liable to the District until all such liabilities are fully satisfied.

25. Internet Access

It is the responsibility of all potential bidders who gain access to bid specifications through the internet, to maintain a current email address and monitor the incoming

emails regarding this bid. This will ensure notification of any bid specification changes through addendum.

Special Conditions

1. Funding Approval

The project herein is contingent upon the approval of funding from the Universal Service Fund's Schools and Libraries Program, otherwise known as E-Rate. Even after award of contract(s) and/or E-Rate funding approval is obtained, the District may or may not proceed with the project, in whole or in part. Execution of the project, in whole or in part, is solely at the discretion of the District.

2. Pricing Proposal

Please prepare your proposals in the provided "Pricing Proposal" section. All blanks must be appropriately filled in, and all prices must be stated. Any proposal not submitted through the District's eprocurement platform, by the specified date and time, will not be considered. If a hard copy is mailed to the District, the District will send it back to the bidder, unopened.

The district withholds the right to extend the date by one week and request proposal responses if no proposals are received by the original due date.

Encyclopedic proposals which do not specify the products or services that will meet the scope and requirements specified may be disqualified.

3. Brand Names and Numbers

Brand names and numbers when given in Specifications are for reference. Proposals on equivalent items will be considered provided the proposal clearly describes the article offered and it is equivalent in quality and utility.

Bidder must state brand and model on each item. If proposing other than the make, model, or brand specified in the specifications, state the item offered by the manufacturer's name and model number. Unless the proposer clearly indicated in his proposal that he is offering an "equal" product, his proposal shall be considered as offering the brand name product referenced in the invitation for proposals.

Acceptance of products differing from products listed will require prior written approval from the District. These products must be submitted during the request for information period, and must be submitted through the eProcurement platform's "Question & Answer" section by 4:00 pm on Friday, November 6, 2026.

4. Qualifications of Bidder

The District expects Service Providers to make themselves thoroughly familiar with any rules or regulations regarding this request. Service Providers are required to be in full compliance with all current requirements and future requirements throughout the contractual period of any contract entered into as a result of this RFP.

All proposers may be required to furnish evidence of their technical ability, experience, and financial responsibility. No proposal will be accepted from, or a contract awarded to, any party or firm in arrears to the District, or who is a defaulter as surety, vendor or otherwise within the past twelve (12) months.

5. Award of Contract

Proposals will be evaluated on the following criteria:

<i>Criteria Description</i>	<i>Percentage of Score</i>
<i>Price Proposal</i> Vendors must provide a transparent, fully itemized cost structure outlining all initial and ongoing expenses. Pricing must be fixed-fee or clearly defined based on licensing models to ensure no hidden costs during implementation or operation. Responses must explicitly address each sub-category listed in section 1 of 5.2 of the bid.	15%
<i>Platform Specifications & Technical Compliance:</i> Vendors must detail how their proposed system satisfies all functional, technical, and compliance requirements set forth by SMUSD. Responses must explicitly address each sub-category listed in section 2 of 5.2 of the bid.	40%
<i>Professional Services & Project Delivery</i> Vendors must demonstrate their capability to successfully deliver, configure, and maintain the system through a structured service model. Responses must explicitly address each portion listed in section 3 of 5.2.	30%
<i>Vendor References & Similar Projects</i> Vendors must establish their experience, stability, and success in deploying similar solutions in comparable educational or public sector environments. Responses must explicitly address each portion listed in section 4 of 5.2.	15%

The term of the contract will be as follows:

1. Initial term: February 1, 2027 - June 30, 2028

2. Renewal Option #1: July 1, 2028 - June 30, 2029
3. Renewal Option #2: July 1, 2029 - June 30, 2030
4. Renewal Option #3: July 1, 2030 - June 30, 2031

The District holds the right to award the scope in full, or a portion of the scope, based on funding levels of the District.

6. Billing and Invoicing

Products and services must be delivered before billing can commence. At no time may the Service Provider invoice before goods or services are provided.

7. Records Retention

Respondent hereby agrees to retain all books, records, and other documents relative to any Agreement resulting from this RFP for five (5) years after final payment. The District, its authorized agents, and/or auditors reserves the right to perform or have performed an audit of the records of the Respondent and therefore shall have full access to and the right to examine any of said materials within a reasonable period of time during said period.

8. Insurance

The successful vendor shall maintain adequate insurance to protect itself and the District from claims for damages or personal injury, including but not limited to, death, damage to property and loss of property, and from claims under Workers' Compensation Acts, which may arise from operations under a contract with the District. The successful vendor shall be required to file the following proof of such insurance with the District prior to receiving authorization to proceed on a contract:

- A. Commercial General Liability (CGL): CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$2,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
- B. Automobile Liability: covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.
- C. Workers' Compensation: as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

- D. Professional Liability (Errors and Omissions): Insurance appropriate to the Contractor's profession, with limit no less than \$1,000,000 per occurrence or claim, \$2,000,000 aggregate.
- E. Sexual Abuse and Misconduct (SAM) Insurance: Insurance provided on a "occurrence" basis, in the amounts of \$2,000,000 per occurrence.

Specifications & Proposal Requirements

1. Platform and Service Specifications

Summary

The San Marcos Unified School District (SMUSD) is seeking proposals for a comprehensive Human Resources Database System. The system should streamline HR processes, ensure compliance, and integrate seamlessly with existing tools and workflows. The selected vendor will also provide implementation services, including data merging and the integration of manual processes into the new platform.

Technical Specifications

Automation & Compliance

- A. **Automated Compliance Gathering and Alerts:** The system must automatically facilitate the gathering of legally required clearance information and alert HR personnel of upcoming compliance requirements such as TB tests, credential expirations, and required trainings.
- B. **Automated Certification & Credential Renewal Tracking:** The system should track certification, mandated training, and credential renewal dates and send automated reminders to employees and HR staff.
- C. **Integrated Employee Evaluation Management:** The system must include tools for automated scheduling, tracking, and storage of employee evaluations.

Integration & Workflow

- A. **Auto-populating Employee Records:** The system should be capable of auto-populating employee records directly from onboarding tools such as Droplet, Ed Join, Frontline (Absence Management), PeopleSoft (Payroll).
- B. **Integrated Volunteer & ID Badge Management:** The system must provide an end-to-end workflow for managing volunteers and issuing ID badges.
- C. **Automated Notification Triggers:** The system should send automated notifications to IT, Payroll, and relevant sites upon the hiring or offboarding of employees.
- D. **Automated Annual Roll-overs:** The system must support automated annual roll-overs for all employee classifications.

Benefits & Documents

- A. **Digital Repository for Benefit Documents:** The system should include a dedicated holding space for storing active and retiree benefit documents.
- B. **Age-out Tracking and Auditing Tools:** The system must have built-in tools for tracking age-out events (e.g., Age 26 dependent reports) and conducting audits.

System & Access

- A. **Modern, Intuitive, Web-based UI:** The system must feature a modern, user-friendly web-based interface that allows for remote access.
- B. **Expanded Licensing:** The system should offer expanded licensing to ensure that leadership and all key personnel have access.
- C. **Unified Employee Master Records:** The system must maintain unified employee master records to eliminate duplicate data entry across departments.

Service Requirements

- A. **Implementation Services:** The vendor must provide comprehensive implementation services, including data merging and the integration of existing manual processes into the new platform.
- B. **Training:** The vendor must offer training sessions for HR staff and other key personnel to ensure smooth adoption of the new system.
- C. **Support & Maintenance:** The vendor must provide ongoing support and maintenance services, including regular updates and troubleshooting assistance.
- D. **Customization:** The vendor should offer customization options to tailor the system to the specific needs of SMUSD.

Delivery Requirements

- A. **Project Timeline:** The vendor must provide a detailed project timeline, including key milestones and deliverables.
- B. **Data Migration:** The vendor must ensure the secure and accurate migration of existing HR data into the new system.
- C. **Testing & Validation:** The vendor must conduct thorough testing and validation to ensure the system meets all specified requirements before going live.
- D. **Go-live Support:** The vendor must provide on-site and remote support during the go-live phase to address any issues that may arise.

Standards

The proposed system must comply with the following standards:

- A. **Data Security:** The system must adhere to industry-standard data security protocols to protect sensitive employee information.
- B. **Accessibility:** The system must comply with ADA (Americans with Disabilities Act) standards to ensure accessibility for all users.
- C. **Interoperability:** The system must be compatible with existing SMUSD systems and tools, including but not limited to Droplet, IT, and Payroll systems.
- D. **Compliance:** The system must comply with all relevant federal, state, and local regulations governing HR practices and data management.

By submitting a proposal, the vendor agrees to meet all the requirements outlined in this Scope of Work and to provide the necessary products and services to ensure the successful implementation and operation of the Human Resources Database System for San Marcos Unified School District.

2. Proposal Requirements

Vendors responding to the San Marcos Unified School District (SMUSD) Request for Proposal for a Human Resources Database System must structure their proposals according to the four scorable areas detailed below. Failure to address any required component within these areas may result in proposal disqualification or a reduced score.

Section 1: Price Proposal (Scorable Area 1)

Vendors must provide a transparent, fully itemized cost structure outlining all initial and ongoing expenses. Pricing must be fixed-fee or clearly defined based on licensing models to ensure no hidden costs during implementation or operation.

A. Licensing & Software Fees

- Itemized breakdown of software licensing costs (e.g., per-user, tiered, or enterprise-wide).
- Licensing structure options that cover HR staff, District leadership, and all key personnel across school sites.
- Annual subscription or software renewal fees for Years 1 through 5.

B. Professional Services & Implementation Costs

- Fixed-cost breakdown for implementation, workflow integration, and custom configuration.

- Flat-rate or hourly pricing for data merging, clearing duplicate records, and migrating historical data.
- Costs associated with initial training (onsite and remote) for HR staff and District administrators.

C. Ongoing Maintenance & Technical Support

- Annual support, maintenance, system updates, and patch release fees.
- Tiered support cost options.

D. Total Cost of Ownership (TCO) Summary

- A 5-year TCO table consolidating all software, service, migration, training, and maintenance costs.

Section 2: Platform Specifications & Technical Compliance (Scorable Area 2)

Vendors must detail how their proposed system satisfies all functional, technical, and compliance requirements set forth by SMUSD. Responses must explicitly address each sub-category below.

A. Automation & Compliance Management

- **Clearance & Expiration Tracking:** Describe how the system automatically collects, monitors, and sends automated alerts for legally required clearances, including TB test results, credential expirations, and mandated training.
- **Credential & Certification Reminders:** Explain the automated notification triggers sent to both individual employees and HR personnel for upcoming credential renewals.
- **Reporting:** Describe how the system pulls canned reports for State reporting requirements and how the system allows us to pull specific data driven reports for Cal SAAS, J-90, and Seniority lists for layoff purposes.
- **Evaluation Management:** Detail the embedded tools for automated scheduling including behind the scenes what/if analysis for specific employees, tracking, workflow routing, and digital storage of annual employee evaluations.
- **Intent to returns/Notice a Reasonable Assurance:** Describe how the system can send bulk contracts, Intent to returns or Reasonable Assurance letters that would be individualized for each employee regarding salary, site, etc.

B. Integration, Workflow & Data Integrity

- **Onboarding Integration:** Detail the system's ability to auto-populate information for employee records directly from recruitment platforms or the systems own onboarding platform.
- **Volunteer & ID Badge Management:** Describe the end-to-end workflow for intake, tracking, approval of volunteers, and direct integration with ID badge issuance systems.
- **Cross-Departmental Triggers:** Explain how automated notification triggers inform IT, Payroll, Benefits, and site administration upon employee hiring, status changes, or offboarding.
 - Program shall notate all different pay options for staff, inclusive of the following types of pay structures: stipends, step/column advancement, etc.
- **Annual Roll-overs:** Describe the system's capabilities for executing automated annual salary and years of service roll-overs across diverse employee classifications (Certificated, Classified, Management, Confidential).
- **Unified Master Records:** Explain how the database architecture maintains a single, unified employee master record to prevent duplicate entries across departments.
- **Document Storage:** Describe the document holding space for personnel files and confidential medical documents (e.g. FMLA, ADA, doctors certificates) and how the document storage is role-restricted.

C. Benefits Administration & Document Repository

- **Benefits Holding Space:** Describe the secure, digital repository dedicated to active employee and retiree benefit enrollment information, including plan listings, and dependent information including current and historical plan selections, tier levels, and qualifying event tracking.
- **Benefits Document Storage:** Describe the secure, digital repository dedicated to active and retiree benefit documents including uploads, storage, and retrieval of benefit documents.
- **Age-Out Tracking & Auditing:** Detail built-in auditing tools and reporting capabilities for tracking age-out milestones (e.g., dependent coverage termination at age 26, retirees/spouses change or terminations age 65).

D. System Architecture, Security & Standards Compliance

- **User Interface & Remote Access:** Detail the modern, web-based UI, showing mobile responsiveness and browser compatibility for remote access.
- **Data Uploads/Connectivity** - Detail the integration capabilities the system has with third-party systems (e.g. PeopleSoft) and file formats used for bulk imports. Detail the systems Application Programming Interface (API) capabilities.
- **Data Security & Privacy:** Document compliance with industry-standard security protocols (e.g., SOC 2, encryption in transit and at rest) to safeguard sensitive PII and HR data.
- **Accessibility (ADA Compliance):** Demonstrate compliance with Section 508 and WCAG 2.1 AA standards for accessibility.
- **Interoperability & Standards:** Explain system compatibility with SMUSD's existing IT infrastructure, Payroll, and administrative systems.

Section 3: Professional Services & Project Delivery (Scorable Area 3)

Vendors must demonstrate their capability to successfully deliver, configure, and maintain the system through a structured service model.

A. Implementation & Manual Process Integration

- Detailed plan for re-engineering and converting existing SMUSD manual/paper processes into automated digital workflows within the platform.
- Approach to custom system configurations tailored to specific District operational workflows.

B. Data Migration, Merging & Validation

- Methodologies for extracting, cleaning, merging, and securely migrating historical HR data into the new platform without data loss or corruption.
 1. Includes potential processing of large scanned data files and digitally sorting them into the new HR Management System.
- Data verification and testing protocols prior to final sign-off.

C. Project Management & Implementation Timeline

- A detailed project schedule (Gantt chart preferred) outlining major milestones, resource allocation, risk mitigation strategies, and critical path deliverables.
- Testing and validation phase plans (Unit Testing, User Acceptance Testing/UAT).

D. Training & Change Management

- Comprehensive training syllabus tailored to HR super-users, District leadership, and site administrators.
- Provision of user manuals, self-paced documentation, and train-the-trainer options.

E. Go-Live Support & Ongoing Operations

- Structure of dedicated on-site and remote technical support provided during the go-live window.
- Ongoing Service Level Agreements (SLAs), including response times for standard tickets vs. critical system outages, regular updates, and ongoing troubleshooting.

Section 4: Vendor References & Similar Projects (Scorable Area 4)

Vendors must establish their experience, stability, and success in deploying similar solutions in comparable educational or public sector environments.

A. TK-12 School District Experience

- Summary of the vendor's experience implementing HR database platforms specifically for TK-12 public school districts in California.

B. Client References

- Provide a minimum of **three (3) verifiable references** from school districts or public agencies of similar size and complexity to SMUSD (approx. 18,500 students / 3,000 employees) implemented within the last 3–5 years. Each reference must include:
 - District/Agency Name and Location
 - Contact Person (Name, Title, Phone, Email)
 - Scope of Project (Modules implemented, integrations built, user volume)
 - Project Timeline (Planned vs. Actual Go-Live)

C. Project Summaries

- Provide two (2) detailed project summaries highlighting past implementations that involved complex data merging, onboarding integrations (such as Droplet), and volunteer/ID management automation.

Pricing Proposal

SOFTWARE

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
1	HR Software [*]	1	LOT		
[*] Denotes item is taxable Sales Tax (@ 8.75%)					
TOTAL					

IMPLEMENTATION

Line Item	Description	Quantity	Unit of Measure	Unit Cost	Total
2	Implementation Services	1	LOT		
3	Professional Development & Training	1	LOT		
4	Additional Hours for purchase	1	Hour		
TOTAL					

Vendor Questionnaire

1. Upload of Proposal*

*Response required

2. Experience & Fiscal Soundness*

Vendor to provide the following information (25%):

- Experience with similar project (list 3 or more)
- School District reference list

*Response required

3. Certification of Information Provided*

The bidder, hereby certifies under penalty of perjury under the laws of the State of California, that all of the information submitted by the bidder in connection with this bid and all of the representations made herein are true and correct.

☐ Please confirm

*Response required

4. Acknowledgment of Public Information*

The Service Provider acknowledges that all pricing and technology infrastructure information in its RFP shall be considered as public and non-confidential pursuant to §54.504 (2)(i)(ii).

☐ Please confirm

*Response required

5. Certification of Nondiscrimination By Seller*

As a supplier of goods or services to the District, the firm listed below certifies that it does not discriminate in its employment with regard to race, religion, creed, sex, national origin, or handicap; that it is in compliance with all Federal, State, and local directives and executive orders regarding nondiscrimination in employment; and that it agrees to demonstrate positively and aggressively the principal of equal opportunity in employment.

We agree specifically:

- A. To establish or observe employment policies which affirmatively promote opportunities for minority persons at all job levels.
- B. To communicate this policy to all persons concerned, including all company employees, outside recruiting services (especially those serving minority communities), and the minority communities at large.
- C. To take affirmative steps to hire minority employees within the company.

☐ Please confirm

*Response required

6. Certificate of Workers' Compensation*

Labor Code Section 3700.

“Every employer except the State and all political subdivisions or institutions thereof, shall secure the payment of compensation in one or more of the following ways:

- A. By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.
- B. By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his or her employees.”

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

☐ Please confirm

*Response required

7. Non-collusion Declaration *

The party making the attached proposal; that the attached proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced or solicited any other proposer to put in a false or sham proposal, or that anyone shall refrain from proposing; that the proposer has not in any manner, directly or indirectly, sought by agreement, communication, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other proposer, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

☐ Please confirm

*Response required

8. Maintaining a Drug Free Workplace*

San Marcos Unified School District Policy 4004 in relevant part provides:

This Board Policy is adopted pursuant to the federal Drug-Free Workplace Act of 1988, the federal Drug-Free Schools and Communities Act Amendments of 1989, and the California Drug-Free Workplace Act of 1990. It is the policy of the District that all its workplaces and facilities be drug and alcohol free.

The unlawful manufacture, distribution, dispensation, possession, or use of any alcohol beverage, drug or controlled substance in any workplace or facility of the District is strictly prohibited. All employees are prohibited from the unlawful manufacture, distribution, dispensation, possession, or use of alcohol or a controlled substance in any workplace or facility of the District. All employees will abide by this prohibition as a condition of employment. Any employee who violates this prohibition will be disciplined

up to and including dismissal, and/or required to satisfactorily complete a drug abuse assistance or rehabilitation program selected by the District in conformance with law.

All employees must notify the Superintendent in writing within five (5) days of any drug or alcohol statute conviction for a violation occurring in any workplace or facility of the District. A conviction includes any finding of guilt, including a no contest pleas, or imposition of a sentence. Any employee who is convicted of such a violation will be disciplined up to and including dismissal, and/or required to satisfactorily complete a drug abuse assistance or rehabilitation program selected by the District in conformance with law.

Each District consultant, contractor and vendor shall, moreover, advise the District whether they have a policy or procedure for maintaining a drug free workplace at the consultant's, contractor's, or vendor's own place of business and if so, shall briefly describe it in writing to District officials.

If awarded contract for above referenced bid, Contractor agrees to comply with San Marcos Unified School District Board Policy 4020 as detailed above.

in accordance with the above, the following must be confirmed as part of the bid package.

☐

☐ Please confirm

*Response required