



**DALLAS COUNTY
PURCHASING DEPARTMENT**

Records Building, 500 Elm Street, Suite 5500
Dallas, Texas 75202

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Purchasing Director**

February 10, 2026

**ADDENDUM #1
RFP 2026-012-7097 RFP RECORDS MANAGEMENT SYSTEM (RMS)
FOR DALLAS COUNTY SHERIFF OFFICE**

Whereas,

By the way of this addendum, Dallas County Purchasing will edit Appendix D to remove Appendix G and H. Appendix's G and H will now be their own attachments. This addendum will also provide answers to the question received and extends the question period to March 9th at 2:00PM CST.

Question 1: How many sworn deputies does DCSO have?

Answer 1: 500

Whereas,

Question 2: RFP States that these documents need to be submitted with Proposal – however there was no Appendix G included with the document downloads in Bidnet. And there is no separate upload for this attachment in Bidnet. Can you let me know where to find these documents and should they be included with the proposal upload?

Answer 2: Appendix G and H are now their own attachments.

Whereas,

Question 3: Due to the size of this detailed RFP we would like to respectfully request a 3-week extension so that we may best prepare our solution to the Sheriff's Offices challenges.

Answer: Submission date extended to Thursday, March 19th at 2:00PM Dallas County time.

Except as provided herein/above, all other specification requirements of the original solicitation referenced shall remain unchanged in full force and effect. This addendum should be signed and returned with your Solicitation package on or before 3/19/2026, @ 2:00PM (CST).

APPENDIX D
IMPLEMENTATION SERVICES NARRATIVE RESPONSE QUESTIONS

Implementation of the Records Management Systems will be in Dallas County. While there are many deployment methods available to Dallas County, the ideal deployment strategy is to leverage resources and minimize risk. Despite this goal, the business needs are unlikely to be met by the system until it is fully installed.

County would ideally prefer a single “Go Live” event of implementation for all users due to the interdependencies between groups, however, realizes that may not be realistic. In addition, the County is aware of the increased risk, substantial resource requirements, cost, and overall significant level of effort a single event would require. Therefore, to minimize potential issues and the duplication of effort that would occur with maintaining two simultaneous systems the County is interested in receiving recommendations from Proposers on the best method for implementation.

Proposers shall recommend an implementation strategy that minimizes risk and optimizes results while minimizing negative operational impacts.

Part of this solution may be a staggered implementation with a very short lag between functions, offices, or other basis for separation of parts of the system recommended by the Proposer. A significant time lag between functions, offices or other basis of separation would not be acceptable. The County will be looking for the best possible plan for addressing this aspect of its acquisition.

Please answer the following questions in detail. Make sure that any prerequisites or assumptions are clearly identified in the answer.

1. Project Plan

Please provide a detailed work plan for the implementation of the RMS consistent with addressing the concerns of both the functional staff and the technical staff.

1.1. Phases, if appropriate, and Major activities

- 1.1.1. Describe your recommended rollout strategy. Indicate whether the implementation will be a single event or phased, and the planned duration from the first Go Live event to the last. Include which functions, offices, or other basis for the separation of the system into parts should be implemented simultaneously, the order in which they should be rolled out, and a high-level timeframe for phasing rollouts by major milestones, if a single event is not planned.
- 1.1.2. Describe each milestone of the phase including the specific functionality, offices or other basis that is included.
- 1.1.3. Describe the major activities (e.g. Business Process Review, infrastructure installation, technical modification/customization, configuration, conversion, testing, implementation, technical training, user training, and warranty/acceptance) within each milestone or phase showing all significant tasks required for successful completion of the milestone or phase objectives.
- 1.1.4. Describe your method of including, working with and accommodating the large group of stakeholders and SMEs participating in the project with appropriate consideration of their respective roles.

- 1.2. Detailed timeline (by Gantt, Pert or other chart)
 - 1.2.1. Provide timeline details for all milestones in a single event plan or phases for a phased plan indicating the start dates, end dates and milestones.
 - 1.2.2. Provide timeline details for all major activities in each phase of a phased plan indicating the start dates, end dates, and milestones.
 - 1.2.3. Provide timeline details for all deliverables in both types of plan.
- 1.3. Resource allocations
 - 1.3.1. Based on your experience with customers of a comparable user base, please recommend internal County resources needed during the implementation and for the first 3 months after go-live. If a phased plan is proposed, these must be provided for each implementation phase and for the first 3 months after go-live for each of your recommended rollout phases. Describe the skill sets needed for each resource.
 - 1.3.2. Identify the expected hours by resource and quote it as a part of the implementation cost.
- 1.4. Deliverables
 - 1.4.1. List and describe all deliverables by milestone for a single event plan and by phase in a phased plan.
 - 1.4.2. Identify major dependencies for each deliverable.
 - 1.4.3. Provide samples of all major deliverables proposed.
- 1.5. Sample Implementation Plan
 - 1.5.1. Please provide a sample implementation plan used during an actual implementation of comparable scope and size within the last 6 years. It should include both a base timeline and actual timeline of phases, activities, and deliverables. County utilizes Smartsheets for project management; please provide the implementation work plan using this tool if possible. If you use another tool, please provide the plan in Excel, and indicate the product in which you would manage the project.

2. **Training**

All departments and offices in Dallas County have multiple users of the RMS for a variety of roles, and some users have more than one role. Training will need to address role specific functions and offer the opportunity for users to attend more than one training session based on business needs. Some users will need only a basic system overview, while others will require in depth knowledge of numerous components or modules of the system. Roles will be based on function and not just office or location. The County will work with the successful respondent to define these roles and their parameters as part of the Resource Management Plan.

Provide a detailed explanation of your proposed training solution. Include the following options:

- 2.1. Describe your approach to training, (i.e. on site at the County vs. at Proposer facilities, train the trainer vs. train all users, instructor lead vs. computer based), training materials, and methodologies.

- 2.2. Describe the training staff expected to be provided by the County and their roles and responsibilities.
- 2.3. Provide the recommended time commitment required of each group of trainees.
- 2.4. Describe your IT training recommendations for Super Users, including onsite/off-site preference, methodology and knowledge transfer. Include specifics for database administrators, system administrators, network administrators, operations, help desk and other IT personnel if the approach differs.
- 2.5. Provide an example of training materials utilized.
- 2.6. For any third-party software recommended, identify those that provide training in the use of their application.
- 2.7. Provide a training plan for on-site, instructor-led, hands-on training for at least 2500 users that includes a variety of business specific training sessions for at least the following roles:
- 2.8. Training for System Administrator and Database Administrator
- 2.9. Training for forms and report creation
- 2.10. What is the ratio of trainer to students?

Appendix G Data Conversion and Transfer

1. **Appendix G Data Conversion and Transfer** *(This section should be uploaded as a separate file in the original format (Word), OR if Paper Submission saved on a flash drive as a separate file from the RFP response, entitled "{insert respondent name} Appendix G Data Conversion Requirements.")*
 - 1.1. Please fully describe:
 - 1.1.1. The approach, tasks, schedule, and resources that will be employed to convert case management records for effective implementation, operation, and report generation under the proposed solution.
 - 1.1.2. Electronic records to be converted. Resources considered in this description must include at least the specialized information technology and communications personnel, specialized tools, and ancillary goods.
 - 1.1.3. The description must explain the scope of data to be converted and the approach to planning, designing, and testing conversion. It must identify the tasks, schedule, resources, and tools required to convert data. Please outline the number of employees, roles and responsibilities, skills and time availability needed for Dallas County employees.
 - 1.1.4. Please list reports that will be provided such as source and target record counts, and exception reports.
 - 1.1.5. Please describe your ability to write scripts to correct invalid data in batch mode.
 - 1.2. Provide a detailed explanation of your proposed data conversion strategy. Include the following
 - 1.2.1. Describe your recommended data conversion methodology and approach. Describe your "pre-conversion" data cleansing programs, processes, and procedures.
 - 1.2.2. Describe your data mapping tools, particularly those used for the mapping of cross-walks for major code structure changes. Do you provide detailed reports of data/field usage and identify discrepancies? Do you provide conversion reports to validate conversion?
 - 1.2.3. What roles and responsibilities will Dallas County employees have in the conversion?
 - 1.2.4. Provide detail regarding the number of data pushes included in the contract and the ability of the vendor to write scripts to fix data between data pushes.
 - 1.2.5. Describe the process recommended to get the data from Dallas to the vendor or cloud provider.
 - 1.3. Provide a detailed explanation of your proposed data transfer frequency and quality strategy. Including the following considerations for:
 - 1.3.1. Real-Time or Continuous. Data transfers occurring continuously or in near real-time. This approach ensures that changes to the data are transferred immediately.
 - 1.3.2. Hourly. Data transfers are scheduled to occur every hour. This frequency is suitable for organizations that need relatively up-to-date information but can tolerate some delay.
 - 1.3.3. Weekly. Data transfers occur once a week. This frequency is suitable for non-critical data or situations where frequent updates are not necessary.

Appendix G Data Conversion and Transfer

- 1.3.4. Custom Schedule. The organization defines a custom schedule based on its specific needs. For example, transfers might be scheduled multiple times a day during peak business hours and less frequently during off-peak times.

Appendix H System Customization

1. **Appendix H System Customization** *(This section should be uploaded as a separate file in the original format (Word), OR if Paper Submission saved on a flash drive as a separate file from the RFP response, entitled "{insert respondent name} Appendix H System Customizations.")*

Provide a detailed explanation of your proposed strategy for any application customizations that may be required to meet the County's business requirements.

Include the following:

- 1.1. Describe your recommended approach for analyzing areas requiring customization and executing the design and implementation of these modifications.
- 1.2. Describe controls that are in place to limit the impact of new or modified modules on related modules or software components that interact with the new or modified code.

2. **Organizational Change Management**

It is the County's desire to have the Proposer provide change management leadership and subject matter expertise, with the County staff conducting the activities of the change management team.

- 2.1. Please provide a detailed explanation of your proposed solution's change management tools and approach. Include the following:
 - 2.1.1. Describe your recommended change management approach.
 - 2.1.2. Describe the recommended timing of change management activities and method of assessing change readiness.
 - 2.1.3. Describe your recommended communication approach, including your preferred frequency and method of communication.
 - 2.1.4. Describe the job aids, user manuals, or other materials designed to enhance acceptance of the new system by the user community after deployment.
- 2.2. The County desires to be an integral part of the change management effort. Describe your approach to knowledge transfer specifically in the area of change management.
 - 2.2.1. Describe in detail the major roles and activities that you recommend be provided by the County.
 - 2.2.2. Describe your recommended staffing for change management activities. Include this staffing in the implementation cost tab of the cost spreadsheet, attached as
 - 2.2.3. Describe your recommended approach for handling the conversion of historical data and initial table population. Include information on both extraction from the legacy systems and loading data into the new system.
 - 2.2.4. Describe how conversion testing will be performed (include how errors are identified and corrected). Describe the data review process and how end users will communicate data errors and issues found after a data push. Describe the process

Appendix H System Customization

and tools you use to document issues found. Once data issues are resolved, do you go through the issue list and “prove” the resolution with the end users? Are the data review work sessions a facilitated on-site activity?

- 2.2.5. Describe any assumptions that you have made related to the data conversion requirements that the County should complete prior to the implementation project start date.

3. Testing for effectiveness of implementation

Provide a detailed explanation of your proposed testing strategy. Include the following:

- 3.1. Describe your methodology and approach to testing and quality control including:
 - 3.1.1. Capacity testing (load/stress, volume/throughput)
 - 3.1.2. Unit testing covering both normal and exception processing
 - 3.1.3. Integration/Interface testing (APIs, batch processing, integration between modules and external interfaces)
 - 3.1.4. Business process testing
 - 3.1.5. Performance testing to meet metric requirements defined in Section F
 - 3.1.6. Acceptance testing
 - 3.1.7. Regression testing (with installation of new module, patch, upgrade, customizations, etc.)
 - 3.1.8. Test incident reporting and resolution.
- 3.2. List any tools you recommend for configuration management, capacity testing and issue/defect tracking.
- 3.3. Describe your recommended test environment.
- 3.4. Describe the procedures for loading and refreshing data in the County’s test environment to ensure it contains a fully functional environment.

4. Business Process Gap Analysis

Provide a detailed explanation of your proposed gap analysis strategy. Include the following:

- 4.1. Describe your methodology for performing gap analysis between the County’s current state and desired state based on functional and technical requirements.
- 4.2. Describe your gap resolution strategy to ensure that best practices are incorporated where possible and customization minimized.
- 4.3. Provide a copy of your gap analysis template or a sample gap analysis from a previous project of similar scope and size.

5. Other

Appendix H System Customization

- 5.1. Please let us know about any other system, service, or solution you offer that may be of interest to County.

- 5.2. Please let us know about any assumptions your organization has about what County will provide before, during, or after the implementation.