OWENS STATE COMMUNITY COLLEGE

Enterprise Resource Planning System

REQUEST FOR PROPOSALS

November 8, 2021

Response due December 20, 2021

Table of Contents

1 INTRODUCTION 5

1.1 Request for Proposal 5

1.2 Notice 5

1.3 Inquiries 5

2 BACKGROUND 6

2.1 The Organization 6

2.2 Objectives and Goals 6

2.3 Institutional Metrics 7

3 NATURE OF THE RFP 8

3.1 Scope of Proposal 8

3.2 Vision for Successful ERP Outcomes 9

3.3 Expected ERP Capabilities 10

3.4 Proposer Options 16

4 GENERAL PROPOSAL INSTRUCTIONS AND INFORMATION 17

4.1 Proposal Instructions 17

4.2 Oral Presentation 19

4.3 Public Information 19

4.4 Contact Office 20

4.5 Right to Reject Proposals, Waive Informalities, and Award Agreements 20

4.6 Execution of Agreement 20

4.7 Respondent's Costs to Develop Response or to Fulfill Contractual Responsibilities 20

4.8 Assignment 20

5 SELECTION PROCESS 21

5.1 Projected Selection Timeline 21

5.2 Pre-Proposal Vendor Review 22

5.3 Intent to Bid Notification 22

5.4 Q&A Format 22

6 RESPONSE EVALUATION 24

6.1 Scoring Criteria 24

6.2 Demonstrations and Interviews 24

6.3 Proposal Rejection and Waiver of Informalities 25
7 GENERAL TERMS AND CONDITIONS 26
7.1 Indemnification 26
7.2 Governing Law 26
7.3 Contingent Upon Appropriation 26
7.4 Unresolved Findings 26
7.5 Suspension or Debarment 26
7.6 Absence of Sanctions 27
7.7 Compliance with Law and Policies 27
7.8 Non-Discrimination 27
7.9 Campaign Contributions 28
7.10 Ohio Ethics and Conflict of Interest Laws 28
7.11 Public Records 29
7.12 Advertising 29
7.13 Entire Agreement 29
7.14 Waiver of Breach 29
7.15 Severability 29
7.16 Independent Contractor Status 29
7.17 Tax Exemption 30
7.18 Permits, Licenses, Taxes, and State Registration 30
7.19 Insurance 30
8 REQUIREMENTS 31
8.1 Mandatory Requirements 31
8.2 Vendor Qualifications 31
8.3 HECVAT Submission 31
8.4 Strategic Roadmap 31
8.5 ERP Functionality Requirements 31
8.6 Implementation and Ongoing Support Services 33
9 APPENDICES 34
9.1 Appendix 1: List of Institutional Integrations 34
9.2 Appendix 2: Definition of Terms 36

9.3 Appendix 3: List of Future State Process Maps **38**

9.4 Appendix 4: List of Required Federal and State Reporting Requirements **43**

10 EXHIBITS ***45***

11 ATTACHMENTS ***47***

11.1 Attachment 1: Owens State Community College Bid Form **47**

11.2 Attachment 2: Owens State Community College Rights and Conditions Form **47**

1 INTRODUCTION

1.1 Request for Proposal

Proposals will be received by Owens State Community College for Enterprise Resource Planning System until December 20, 2021.

All proposals should be clearly marked "Enterprise Resource Planning System" and addressed to Sweta Thakker at erpevaluation@owens.edu.

Should a prospective bidder fail to submit a proposal on or before the appointed time at the address shown above, Owens State Community College may or may not decide to consider the proposal regardless of the reason for the late submission after the accepted bids have been reviewed.

1.2 Notice

This Request for Proposal (RFP) does not obligate Owens State Community College (also referred to as the College) to award a contract or complete the proposed project, and the College reserves the right to cancel this RFP if it is in its best interest.

Proposals must be clear and concise. Proposals that are difficult to follow or that do not conform to the RFP format or binding specifications may be rejected. Responding Vendors must include the required information called for in this RFP. Owens State Community College reserve the right to reject a proposal if the required information is not provided or is not organized as directed. Owens State Community College also reserves the right to change the evaluation criteria or any other provision in this RFP by posting notice of the change(s) on Owens State Community College procurement website at: https://www.owens.edu/procurement/. For this RFP, posting on the captioned website above constitutes written notification to each Vendor. Vendors should check the site daily and are expected to review information on the site carefully before submitting a final proposal.

1.3 Inquiries

Specifications and any questions can be directed to erpevaluation@owens.edu. Questions and responses will become public record. All questions and answers will be provided to all interested firms prior to the submission date. Owens State Community College reserves the right to waive any irregularities and reject any or all proposals, and to determine the lowest and best bid.

2 BACKGROUND

2.1 The Organization

Owens State Community College began as a technical institute under the jurisdiction of the Ohio Department of Education. The first classes were offered in Toledo on September 13, 1965, with less than 200 students. Two years later, in 1967, the College was chartered by the Ohio Board of Regents as a technical college. In 1983, Owens State Community College opened its Findlay-area campus at Cory and Davis streets.

In 1994, the College was chartered as a comprehensive state community college with a district encompassing Lucas, Wood, and Hancock counties and parts of Ottawa and Sandusky counties.

Since 1994, Owens State Community College has more than doubled its student enrollment on the Toledo-area and Findlay-area campuses. Owens' Toledo-area and Findlay-area campuses continually serve more than 17,000 credited students annually.

For more information about Owens State Community College, please go to https://www.owens.edu/about_owens/.

2.2 Objectives and Goals

Owens State Community College is entering this ERP procurement, having utilized their primary ERP for decades. The current ERP solution is Ellucian's Banner. The College is using Access, Excel, SPSS, Tableau, and Argos for analytics. The College has also invested in OnBase document-management solutions. The College is interested in data-migration strategies to preserve these historical documents. Owens State Community College has several current third-party solutions to supplement their current ERP functionality, with a vision that as many as possible will be decommissioned as a part of this new ERP project implementation. The front-end user technology includes a mix of Windows-based, Apple OS-based, and Chrome-based devices. The proposed solution should support Single Sign-On using SAML protocol through MS Azure AD.

Owens State Community College wishes to pursue the evaluation and selection of a new comprehensive ERP solution and configure and implement this product in support of the institution. The goals for this ERP implementation include:

- Improve the student experience by increasing modernization, accessibility, and mobility resulting in higher enrollments and better student retention.
- Increase college productivity, efficiency, capacity, collaboration, and access to data and reporting by aligning business processes across the institution.
- Contain technology costs selecting a cloud/SaaS system allowing for modern technology currency and reducing the need for many third-party systems.

2.3 Institutional Metrics

Academic year 2020-2021 Metrics:	
Credit-based student headcount	11,751
Non-credit based student headcount	4,522
Admissions applications received	12,000
Admissions and recruitment admin users (including continuing ed, corporate, and workforce users)	30
Total number of academic programs offered	92 programs 54 certificates
Total customized training, occupational, and professional classes offered each year	543
Staff headcount	143
Faculty headcount	366 full-time 310 adjuncts
Student worker headcount	28
International students	128
Headcount of students receiving financial aid	3787
Bulk emails sent	1.1 million
Individual emails sent	1.2 million
Number of expense reports processed	284
Peak login during Fall semester start-up (students, faculty, and staff total)	13,000
Anticipated report designers	15

3 NATURE OF THE RFP

3.1 Scope of Proposal

3.1.1 ERP Software Solution

Owens State Community College is seeking a "next generation" ERP solution to serve business operations, manage academic programs, and provide a world-class student experience. The College desires a comprehensive solution that provides for a state-of-the-art integrated approach to the core administrative Student Information System (SIS) (which includes Financial Aid), Financial Information System (FIS), and Human Resource Information System (HRIS), Reporting and Business Intelligence.

The College is seeking an intuitive, modern user interface that provides the ease of use and browser and device-agnostic access that the college community would expect from a major commercial website (e.g., Google or Amazon). The desired solution will have reporting and analytics leading to informed decision-making throughout the College.

The purpose of this Request for Proposal (RFP) is to invite qualified vendors to submit proposals for the solution(s) described below. While creative future-looking proposals are encouraged, the new system must provide the tools needed to be responsive to existing and increasing demands for accountability by accreditation, funding agencies, and regulatory compliance. A fundamental requirement of any solution will be ease of use for students, faculty, and staff. The solution and the implementation of that solution will need to be structured to be available anytime, from any device, using an intuitive interface. Additionally, it is essential that solutions enable well-aligned processes to streamline administrative efforts, freeing up faculty and staff to focus on activities that promote student success.

3.1.2 ERP Implementation Services

In addition to the software solution, Owens State Community College is seeking an implementation services vendor team to provide comprehensive ERP implementation, integration, training, and change management services for the proposed single, shared ERP solution. The services vendor team will be responsible for the implementation of the proposed ERP solution, including but not limited to project oversight, configuration, testing, reporting, scoped integrations, data migrations, documentation, and training materials. The implementation services team must demonstrate experience and success in implementing the cloud-based enterprise ERP solution proposed while successfully guiding the organizations through this transformative change.

The Owens State Community College is considering an implementation project structure consisting of an Executive Sponsor(s), Project Manager, Change Management Lead, Communications Specialist, domain subject matter experts, and technical staff. Given the uncertainty of COVID, the partner should have experience managing projects and facilitating

meetings with remote teams by using collaboration tools (e.g., Zoom, Microsoft Teams, SharePoint).

The proposed implementation services team is expected to work with the Owens State Community College project team to plan for and map data required from the current instance of the ERP solutions to the future ERP solution. The vendor team will test, validate, and import the data provided by Owens State Community College and partner with Owens State Community College to resolve any issues. The Owens State Community College team will cleanse data and provide extracts to the partner implementation services team.

The proposed implementation services team is expected to provide staff and resources who will work with the Owens State Community College team to plan, design, develop, test, and implement integrations defined as in-scope during implementation planning. Integration services may include the implementation and testing of currently available integrations, custom-built integrations, or planning for integrations to be developed by Owens State Community College.

The proposed implementation services team should include appropriate staffing and leadership to cover all phases of the project, from planning through post-implementation support. This includes, but is not limited to, technical architecture/design, security definitions, business rules and configuration/development, testing, end-user readiness and training, companion reporting services, stabilization, transition to operations, and assistance in planning the decommissioning of legacy systems at the duration of the engagement.

3.2 Vision for Successful ERP Outcomes

The goal for a future ERP solution to serve Owens State Community College is one that will provide greater value to the institution and enhance the student experience.

To that end, the College strives to implement a solution that will:

- Be modern, mobile-friendly, and provide an intuitive user interface for students, faculty, staff, and other stakeholders
- Be a fully integrated system that eliminates the need to maintain multiple, disparate applications and their integrations
- Enhance the efficiency of business processes and operations by reducing or eliminating paperwork, current manual processes, duplicate data entry, and inefficient/unintuitive system interactions
- Facilitate continuous improvement, adaptability, and innovation through the better use of HR/finance/student data and efficient transaction processing.
- Lower total cost of ownership
- Offer streamlined document imaging and storage, either directly or through integration with a secondary document management system

- Reduce or eliminate the need to store data in external systems and spreadsheets by consolidating all data in one unified system
- Provide data management tool(s) for archiving/purging to support records retention processes
- Provide comprehensive end-user training on system functionality
- Can load or map existing person IDs to the new system for tracking historical data
- Provide functionality to reduce the creation of duplicate ID records and allow the function for merging those records when needed

To meet these expectations and ensure sufficient support for the student and administrative business processes for decades to come, the future ERP solution must be guided by the following principles.

- Streamlined processes and procedures: To both establish and maintain a consistent user experience and to leverage cloud-based SaaS technology solutions effectively, future-state processes will need to be defined or re-defined across Owens State Community College to support an out-of-the-box implementation (to the degree possible while meeting compliance requirements). This may also include the definition or refinement of policies and practices that assure efficient and consistent processes are adopted across the College.
- Full integration of "non-core" and third-party solutions: To provide the best overall experience, all ERP and ancillary technology solutions that are selected must be capable of being fully integrated and adequately supported.
- Outreach and User Experience: Deliver targeted outreach and engagement throughout the full lifecycle. Enable interactions across channels and devices (including mobile devices).
- Data and analytics: Improve the flow of information and access to business operations of the College. Reduce the amount of redundant data across multiple software systems and ensure data within the ERP has the highest degree of integrity and availability.

3.3 Expected ERP Capabilities

Below are the capabilities the Owens State Community College would like to explore with the proposed ERP solution.

3.3.1 Technology

Owens State Community College is seeking an ERP solution that uses:

- Cloud Native: A comprehensive system that is designed to operate fully in the cloud as a software as a service
- Operates with a High Availability Model: A system designed to be highly available, thereby operating in multiple data centers to ensure availability (99.999% uptime), reduce downtime and reduce system failure risk in a disaster with quick recovery and minimum data loss.

- Information in Real Time: A comprehensive ERP will eliminate batch uploading from auxiliary systems or lagging information for online transactions and reporting.
- Accelerated Response to Regulatory Mandates: When new or changed regulatory mandates arise, the proposed ERP solution must be able to implement changes quickly and effectively to avoid compliance failures.
- Workflow Management: The proposed ERP solution must include comprehensive, configurable workflows to support institutional processes and procedures.
- Mobility: The College is seeking an intuitive, modern interface that provides ease of use, including browser and device-agnostic access.
- Highly Configurable: Capable of supporting configurations over requiring customizations.

3.3.2 Security

The proposed ERP solution must process sensitive student and employee information in a secure environment. Owens State Community College seeks a solution that provides data and application security to allow for:

- Multiple Security and Access Features: The ability to provide single sign-on, two-factor authentication, row-level security, and role-based access controls.
- Encryption: Allows encryption of sensitive data like direct deposit information (per Natcha Security Guidelines).

3.3.3 Data Management, Reporting, and Business Intelligence

Owens State Community College seeks an ERP solution with the following capabilities:

- Consistent and Reliable Data and Predictive Learning: The College desires a solution that facilitates data consistency and reliability by providing data definitions, dictionaries, and validation upon entry. Data maintenance and training must be provided to maintain data integrity and quality. The College seeks a data-management solution that will include enhanced data capabilities and the ability to make automatic assumptions related to data characteristics and usage. The proposed solution should use data to learn what the user accesses at a high level and what is relevant to the user.
- Reporting and Analytics Solutions: A major goal of the college is to improve the effectiveness, efficiency, and availability of information and business intelligence required to manage operations, report to accrediting and regulatory agencies, and support institutional research. The proposed solution must provide end-users with tools for generating standard and ad hoc reports leveraging aggregate data from various locations (including auxiliary solutions), including the ability to address the need for Ohio State Reporting and national IPEDS reports. In addition, it should utilize analytics to provide actionable insights and business intelligence across all functions. The proposed ERP solution should provide all regulatory reporting (Federal, State, Institutional), plus provide additional ability for Owens State Community College end-users to capture necessary data elements as determined by institutional requirements via configuration rather than customization. Examples could be (but not limited to): Contract Eligibility, Disability

Status, Selective Academic Programs, etc. In addition, staff comments or notes should be accessible to relevant areas and aligned to position control and staff roles. Lastly, the proposed ERP solution should have inherent flexibility in naming conventions to allow for more effective data management. There should also be a simplified capability for end-users to develop and deploy ad hoc reporting to enhance data capture and analytics without the need to resort to downloads of information to external utilities such as Excel.

- Other reporting needs should be accommodated and include enhanced, ease of use dashboard reports and report designer capabilities for end-users; the ability to design views for end-users that provide the capability for data review and analysis cross-departmentally; end-user report writing capability, student attendance, and reporting capability; continuing education/workforce development administration and ad-hoc reporting capability; and cohort management.

3.3.4 Student Information System

Owens State Community College is seeking an ERP solution that delivers a student information system for the management of all student data, academic programs, and continuing education/workforce development programs. The future ERP solution must manage the recruiting and application process for student admissions. It must manage course planning and course scheduling, document grading, attendance, bill tuition, and fees, and enable comprehensive financial aid processing while ensuring compliance with federal and state laws and rules governing financial aid.

The proposed ERP solution must provide students with the capability to register for courses, build schedules, access transcripts, and access robust education planning and advising tools. In addition, the College seeks to deliver the following capabilities for students (credit, non-credit, continuing education, and customized training):

- Integrated Student Experience: The solution must support a seamless and equitable user experience. The ideal solution will enable students to see and engage in opportunities across the institution while ensuring that all activities are recorded within the correct academic program. The proposed ERP solution will need to incorporate data captured by 3rd Party software products (i.e., Ad Astra, Curriculog, Acalog, Elevate, ReUp) and interface with the LMS in real-time.
- Student Lifecycle: All processes should be centered on a student life cycle rather than an administrative life cycle. The future ERP solution needs to be flexible in its delivery model terms such as semesters/terms, programs, courses, and degrees.
- Admission: The proposed ERP solution should provide students with the ability to submit applications and documentation for admission or transfer credit review for consideration. The proposed ERP solution should interface seamlessly with front-end CRM functionality and provide in-depth data reporting capability for admissions funnel development, territory analysis, demographics, and communication planning, and special programs.

- Student Portal: The proposed ERP solution should provide a student portal that allows students to view and register for all curriculum and learning experiences, regardless of course type (credit, non-credit, and continuing education).
- Transcript: The proposed ERP solution should provide students with a single transcript that combines all curriculum or educational coursework, regardless of course type (credit, non-credit, and continuing education), as well as the capability to receive, send and store transcript data electronically.
- Financial Aid: The proposed ERP solution must comply with federal and state laws and rules governing financial aid (e.g., FERPA, GLBA, Department of Education requirements). The proposed solution should provide a streamlined application process for financial aid allowing students who are enrolled to upload verification documents while ensuring compliance. The proposed ERP solution should provide automation to determine scholarship recipients or to apply financial aid awards to the student's account. In addition, the proposed solution should have the capability to present a student, or their proxy, with a unified, single billing statement (regardless of course type - credit, non-credit, continuing education), with the option to make one payment for all charges or select charges determined by the College's discretion. The proposed ERP solution should also provide for electronic document storage, retrieval, and the ability to attach to the student record. Financial Aid will also require the ability to calculate SAP using courses on the academic transcript; courses which were attempted and could be used for aid determination but withdrawn and do not show on the academic transcript such as attempted hours at visited institutions for consortium agreements; SAP waivers per CARES Act, HEROES Act, or other regulatory action.
- Degree Planning: The proposed ERP solution should provide students with a tool to track and monitor academic progress toward their academic goals and be available on their mobile devices. The proposed ERP solutions should also provide for program evaluation and ease of use for students who may wish to explore possibilities of changing majors or academic programs and progress toward program completion.
- Student Advising: The proposed ERP solution should provide flexibility for academic advisor assignment and interactive communications between advising staff, instructors, and students, as well as message tracking ability. The proposed ERP solution should also provide appointment scheduling and advisor caseload management capability. In addition, the proposed ERP solution should allow for segregation of communications, for example, advisor to advisor, advisor to student, and student only notes or messages. The proposed ERP solution should also provide inherent functionality for early alert and appropriate intervention modalities.
- Continuing Education, Workforce Development, and Corporate Training Automation: The proposed ERP should have integrated, robust functionality to support the diverse needs of continuing education, workforce development, personal enrichment, and corporate training programs. The solutions should allow students

the full capacity to register for credit and non-credit courses within a single registration session or multiple sessions. Further, the proposed solution should provide the ability for organizations to register and pay for their employees' training (on behalf of one or multiple students) without a formal admissions process for students to the College.

- Customer Relationship and Engagement Management: The proposed ERP solution should provide customer relationship management features that can support student and faculty engagement regardless of course type (credit, non-credit, continuing education), and provide internal and external engagement and communications with all constituencies through a common single set of tools to ensure effective and compelling communication and interactions. The proposed ERP solution will need to provide communication capabilities engaging multiple messaging methodologies to connect with constituents based on varying situations.
- Space and Event Scheduling: The proposed ERP solution may be considered for the replacement of the current space and event scheduling software to provide tools for the College to schedule classes, events (e.g., camps, athletic events, conferences, and resources - e.g., food service and equipment).

3.3.5 Finance System

Owens State Community College seeks an ERP solution that can manage financial data. The proposed ERP must manage the general ledger, budgeting, purchasing, accounts payable, and fixed assets to provide a comprehensive picture of the College's financial operations and resources. In addition, the College seeks to ensure the following capabilities are available in the proposed ERP:

- Procurement: The proposed ERP solution must manage and track procurement needs (e.g., sourcing, contract management, inventory control, and spend analytics).
- General Ledger / Chart of Accounts (COA): The proposed ERP solution needs to manage a chart of accounts that can support the complex nature of State and Federal reporting needs requirements and the needs of managing and reporting for each legal institutional entity, including any separate 501c3 organizations and can integrate with Blackbaud Raiser's Edge and Fundriver. External financial data must be able to be easily imported into the GL. The COA must thoroughly accommodate institutions' financial management needs.
- Budget: The proposed ERP solution needs to provide timely and accurate budget reports to aid in strategic decision-making. The College is seeking a solution that offers precision in the details of personnel projections based on characteristics of bargaining agreements and staffing plans. The College needs the ability to build scenarios to measure impact on budget and support optimal decision making in the allocation of resources.
- Grant Management: The proposed ERP solution needs to effectively manage single- and multi-year grants and sponsored projects, including post-award financial reporting on the college's fiscal year, granting agency's fiscal year, and grant period.

- Accounts Receivable and Payments: The proposed ERP solution must manage the College's tuition and fee calculations and track and fully automate the distribution of revenue within the correct department or entity. Further, a comprehensive and secure cashiering function is required, distributing payments across appropriate cost centers, or supporting student payment plan options or third-party payees.
- Financial Aid Applied: The proposed ERP solution must manage award types by setting fund priority and rules for applying or removing funds to and from a student's account for financial aid, payments, and scholarships. The solution must automate the management of award types by priority types and enforce award restrictions.
- Accounts Payable: The proposed ERP solution must ensure timely payments from local accounts to purchasing card banks, vendors, student payroll, financial aid refunds, employee travel reimbursements, and other miscellaneous payments.
- Asset Management: The College would like to explore the functionality of establishing land and facility details to manage real property and building inventory and the impacts of acquisitions, dispositions, leases, easements, and other real property interests and that would also serve as the basis for capitalization and depreciation of capital assets (e.g., equipment, building, building improvements) commencing from the point of initial procurement.
- Tax Reporting: The proposed ERP solution must have the ability to support tax reporting for each institution and for their students, faculty, staff, student workers, and vendors.

3.3.6 Human Resources and Payroll

Owens State Community College seeks an ERP solution for human resources and payroll. The proposed solution must support managing employee assignments, employee intake, seniority, time reporting, leave accrual, tuition waiver, faculty salary placement, faculty credentialing, faculty workload management, professional development, and adhere to the state's requirements for faculty and staff payroll, benefits, and tax reporting. In addition, the College seeks to assure the following capabilities:

- Hiring and Onboarding: Engagement and communication are vital during the hiring and onboarding process to engage and retain employees, faculty, staff, and student workers. The College would like to explore the functionality and streamlined processes to ensure newly hired employees receive the information, access, and tools they need in a timely manner to perform their roles and responsibilities. This includes providing technology credentials for access to required enterprise systems, establishing access to systems, physical locations, and adding the individual to the appropriate information, directories, and online communities.
- Managing Data and Personnel Actions: Ensuring data is easily accessible by both HR professionals and employees is a key component of the system. The College would like to explore the automation of current processes to minimize the need for manual data

entry. The proposed solution should include record keeping of work history and position data for employees and provide online viewing of the employee profile.

- Benefits: The College seeks to provide employees with a single point of access for the selection and management of employee and dependent benefits, particularly utilizing the proposed ERP solution's self-service functions.
- Performance Management: The proposed ERP solution should provide tools to assist with performance management and succession planning.
- Employee Training and Professional Development: The College would like to explore the capabilities of integrated functionality to track required and completed employee training and professional development, as well as the potential for hosting relevant content and delivery within the proposed ERP.
- Employee, Faculty, and Student Payroll: The proposed ERP must have complete functionality to support pay-rate management, funding management, and payroll processing. It also must fully integrate with student domain areas to assure work-study funds are properly monitored and distributed. The College seeks an ERP solution that will assist institutions in managing, with the use of workflows, time-tracking, fund management, and payroll processing and reporting.

3.4 Proposer Options

Unified comprehensive ERP software and comprehensive services: The long-term software provider will be the prime vendor, and a unified, comprehensive software and comprehensive services proposal submitted. All parts of the proposal must be addressed unless otherwise noted. The ERP software and services proposal must be comprehensive as defined in the exhibits below; partial or component proposals will be rejected.

Standalone comprehensive ERP software: The long-term software provider will be the prime vendor. The ERP software proposal must be a comprehensive ERP solution as defined in the exhibits below; partial or component software proposals will be rejected. The standalone proposed ERP solution MUST have at least one comprehensive implementation services proposal submitted under separate cover, or the ERP software proposal will be rejected.

Standalone comprehensive services: In the interest of assuring the best fit for implementation services, standalone implementation service providers will be considered, and proposals must declare which ERP product solution they are supporting. Generic implementation proposals will be rejected. Implementation proposals must be comprehensive of the full implementation scope as defined in the exhibits below; partial or component service proposals will be rejected.

4 GENERAL PROPOSAL INSTRUCTIONS AND INFORMATION

4.1 Proposal Instructions

4.1.1 Proposal Format and Content

Respondents should adhere to the following format and provide all the information requested. All information should be presented in the same order as the RFP. The proposal must consist of the following sections:

Cover Letter - The cover letter for every proposal must be on company letterhead and include the name and working address of the firm submitting a proposal, the name, telephone, and e-mail address of the primary company representative to be contacted with reference to the proposal and the date of submission. The cover letter should also include the following:

- Brief introduction of the Vendor(s), corporate structure, and major business lines
- Attachment with the exceptions to the General Terms and Conditions found in Section 7
- A profile of the firm, including years in existence, services offered, office locations, number of professional staff, etc.
- Requested preference for presentations in a ranked order as indicated in Section 6: Responses Evaluation. Note: All finalist implementation services vendor presentations will occur the same presentation week as their proposed ERP software vendor's demonstration

Understanding the Project – Respondent must provide a comprehensive narrative statement that illustrates an understanding of the requirements of the project and the project schedule, as well as an acknowledgment of each section of the proposal.

Approach and Management Plan for the Project - Respondent must provide a comprehensive narrative statement that sets out the methodology and management plan they intend to follow and illustrate how their plan will serve to accomplish the work and meet the College's project schedule.

Experience and Qualification - Provide a personnel roster that identifies each person who will actually work on the contract. Include the role of each person and a description of the role in regard to this engagement and in relation to the SOW, if selected, resulting from this RFP response.

Written Response to Request for Proposal - Respondent will include a written acknowledgment and response to all sections of the RFP. Detailed responses must be included for Section 8: Requirements. In addition, responses must be included for any and all Exhibits and Attachments as stipulated in this RFP.

Cost Proposal and Fees - Respondent will include a cost proposal specifically reflecting the method of determining charges for work performed. All responses must be provided electronically. Cost information is only allowed using the format in Exhibit XX: Cost Proposal

Workbook and MUST be returned in editable Excel format. THE COST PROPOSAL AND FEES MUST BE IN A SEPARATE ELECTRONIC DOCUMENT FROM THE MAIN PROPOSAL.

Subscription/License Agreement(s) and Statement of Work (SOW) - All proposals must contain their companion documents, as appropriate - a sample subscription or license agreement, cloud services agreement(s), as needed, and the proposed implementation services statement of work must be included.

Duration of Offer - All proposal responses must indicate they are valid for a minimum of two hundred seventy (270) calendar days from the date of the proposal opening unless extended by mutual written agreement between Owens State Community College and the Vendor. Prices and terms of the proposal as stated must be valid for the length of the resulting contract.

Submit Forms – The proposal response must include two forms that are attached to the RFP as Attachment 1: Owens State Community College Bid Form and Attachment 2: Owens State Community College Rights and Conditions Form.

Authorized Signature - The proposal must be completed and signed in the firm's name or corporate name of the Vendor and must be fully and properly executed and signed by an authorized representative of the Vendor. Proof of authority of the person signing must accompany the response. An unsigned proposal may be rejected.

4.1.2 Submission Of Proposal

Proposals should be prepared in a straightforward manner to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content. Costs for developing proposals are entirely the responsibility of the respondent and shall not be chargeable to the College.

4.1.3 Proposal Responses

Responses that do not follow the directions within this section will result in the proposal not being considered.

Any questions concerning this RFP should be directed to the attention of Sweta Thakker at erpevaluation@owens.edu.

Interested firms should submit (1) electronic copy (in Microsoft Word format) of their proposal no later than December 20, 2021, to: Sweta Thakker at erpevaluation@owens.edu. One (1) digital copy of the written proposal with a separate file containing (1) digital copy of the cost proposal and fees MUST be received by 2 p.m. December 20, 2021. The written proposal must be plainly marked "<<RFP Name_Vendor_Written Proposal>> and the cost proposal and fees must be plainly marked <<RFP Name_Vendor_Cost Proposal>>." ALL Excel documents must be returned in editable Excel format. Word documents may be responded to and returned as PDFs. Other documents should be attached as directed and may optionally be added to

individual questions to complete the requested response. Links can be used on a limited basis when needed. Links that cannot be accessed by the Evaluation Team will not be revisited. Changes to the provided response documents' return format will result in the proposals not being considered. Cost information is only allowed in Exhibit 20: Cost Proposal Workbook and MUST be returned in editable Excel format.

Proposals must be received no later than Monday, December 20, 2021, at 2:00 p.m. EST. A proposal shall be considered late and will be rejected if received at any time after the exact time specified for the return of proposals.

Vendors must submit the proposal by completing submission as instructed via electronic files.

Fax and paper proposals will not be considered.

The College is soliciting proposals with a bona fide intention to award a contract. However, this intent will not affect the right of the College to reject any or all proposals.

For selected finalists, the College may request representatives of the respondent to appear for the purpose of interview and presentation of the proposal. Travel expenses and costs related to the interview will be the responsibility of the respondent.

In evaluating the proposals, the price will not be the sole factor. The College may consider any factors it deems necessary and proper for the best value, including, but not limited to, price, quality of service, response to this request, experience, staffing, and general reputation.

4.1.4 Multiple/Alternative Proposals

A proposer may submit multiple or equivalent proposals.

4.2 Oral Presentation

An oral presentation with one or more of the firms submitting proposals may be required after all written proposals have been received by Owens State Community College. The issuing office will schedule the time and place for the interview. Each firm selected for an interview should be prepared to clarify and elaborate on the details set forth in their proposal.

4.3 Public Information

All submitted proposals and information included therein or attached thereto shall become public records at the close of the submission period. Proposals will not be opened and read in a public forum. However, all submitted proposals and information included therein or attached thereto will become the property of the College and are considered public records.

A respondent may submit written questions in order to clarify any matters relating to this Request for Proposals. The proposer's question and Owens State Community College's response will become a public record.

4.4 Contact Office

Sweta Thakker at erpevaluation@owens.edu is the single point of contact and shall be the contact with regard to all aspects of this Request for Proposals. Respondents are not allowed to communicate with Owens State Community College employees, staff, faculty, or officials regarding this RFP, except at the direction of the Owens State Community College contact. Any unauthorized contact will disqualify the vendor from further consideration of this RFP and any future RFP events of the same nature.

4.5 Right to Reject Proposals, Waive Informalities, and Award Agreements

Owens State Community College reserves the right to reject any and all proposals, waive any non-material irregularities or informalities in any proposals, and to accept or reject any item or combination of items.

4.6 Execution of Agreement

If a respondent does not execute an agreement within thirty (30) days after being notified of selection, Owens State Community College may give notice to the respondent of the College's intent to select the next most qualified respondent or call for new proposals, whichever Owens State Community College deems most appropriate. A draft copy of an agreement shall be submitted with the proposal.

4.7 Respondent's Costs to Develop Response or to Fulfill Contractual Responsibilities

The College is not liable for any costs incurred by the respondents prior to or during the Contract unless specified herein. All costs associated with the development of a response and in responding to this RFP are solely that of the respondent and are not chargeable to the College under any resulting contract or in any other manner.

4.8 Assignment

Neither the Contract nor any rights, duties, or obligations described herein shall be assignable by the respondent without the prior written approval of the College. The respondent shall not delegate any duties or obligations to another party without prior written approval by the College.

5 SELECTION PROCESS

Owens State Community College will accept only comprehensive ERP software and comprehensive services proposals. The long-term software provider should be the prime vendor, and a comprehensive software and comprehensive services proposal should be submitted. Owens State Community College will entertain another prime vendor if that enables the fulfillment of the mandatory Terms and Conditions. The ERP software and services proposal must be comprehensive as defined in the request for proposal; partial or component proposals will be rejected.

The selection process includes an evaluation of all qualified proposals. Accordingly, Owens State Community College, via the recommendations of the ERP Evaluation and Selection Committee, shall select the Vendor(s) whose proposal(s) and oral presentation(s), as requested, demonstrate in Owens State Community College's sole opinion, the clear capability to best fulfill the purposes of this RFP in a cost-effective manner.

Owens State Community College reserves the right to accept or reject proposals, in whole or in part, and to negotiate separately as necessary to serve the best interests of the College. This RFP does not obligate Owens State Community College to award a contract or to complete the proposed project, and it reserves the right to cancel this RFP if it is considered in its best interest.

Owens State Community College will not be responsible for any costs incurred by the vendor in preparing and submitting a proposal or in performing other activities related to this RFP and the selection process.

5.1 Projected Selection Timeline

Owens State Community College publishes RFP	Monday, November 8, 2021
Pre-Proposal Review	Monday, November 15, 2021
Mandatory Intent to Bid notification	Friday, November 19, 2021
Deadline for vendor questions	Monday, November 22, 2021
All responses to vendor questions posted	Friday, December 3, 2021
Deadline for proposal submissions	Monday, December 20, 2021
Review RFP proposals	Monday, January 3, 2022 Monday, January 24, 2022
Finalists Announced	Wednesday, January 26, 2022
Vendor Demonstrations/Oral Presentations (via video conference)	Monday, February 21, 2022 to Friday, March 11, 2022
Intent to Award Announced	Monday, March 21, 2022

Owens State Community College reserves the right not to award a contract. The dates noted above are estimates. Owens State Community College does not agree to reach a decision by any

certain date, although it is hoped the evaluation and selection will be completed by the dates identified in the timeline above.

5.2 Pre-Proposal Vendor Review

Owens State Community College will hold a pre-proposal vendor review on Monday, November 15, 2021, from 1 p.m. to 3 p.m. EST, via a video conference call. The pre-proposal vendor review is not mandatory, but it is strongly recommended that all potential or interested respondents attend. The link to register for this meeting is https://owens-edu.zoom.us/meeting/register/tZUpduCrqTkqHN3Q72HvdBgNJZ9OQKNkxleX.

Registration is MANDATORY. After registering, you will receive a confirmation email containing information about joining the meeting.

5.3 Intent to Bid Notification

Owens State Community College asks that all vendors intending to bid on this RFP send a notification to the College before 5 p.m. EST on Friday, November 19, 2021. Notification should be sent from the vendor to the erpevaluation@owens.edu email address. Please send an email stating the vendor's name, contact (name and email), and your intent to bid on software, services, or both. If bidding as a partnership with another vendor, the email should include both vendors' information.

5.4 Q&A Format

All questions pertaining to the RFP must be submitted to erpevaluation@owens.edu no later than Monday, November 22nd, by 2:00 PM EST. Questions that do not follow this process cannot be guaranteed a response.

Questions received after the deadline will not receive a response.

Questions must include the name of the questioner and their telephone number, fax number, and/or e-mail address. Anonymous inquiries will not be answered.

Questions should be submitted following this sample format:

Section#_Section Name_SectionNumber_QuestionNumber#

For Example:

- Section 16.1_Technology_ 1.16.1.4.1 #6a
- Exhibit 19_On-Going Support Services_19.1 #11

All questions and answers will be made publicly available on https://www.owens.edu/procurement/ as they are received. All questions shall receive a response no later than Friday, December 3rd, 2021, 5:00 PM EST.

Vendors must complete the exhibits and attachments itemized on pages 45-49, as directed. Each attachment and appendix can be found at the end of this RFP document. Exhibits are in the RFP Documents Package available to download from www.owens.edu/procurement.

All response documents must be attached using the following naming convention.

Artifact#_DomainName_CompanyName.file-extension

For Example:

- Exhibit 4.1_General Requirements_ABCCorp.xlsx
- Exhibit 4.2 _General Scenarios_ABCCorp.pdf
- Exhibit 20_Cost-Proposal_ABCCorp.xlsx

Supplemental materials must be provided when requested by Owens State Community College or when deemed important by the vendor. Supplemental materials must be appended to the response using the following naming convention:

Exhibit#_Domain Name_QuestionNumber_CompanyName.file-extension

For Example:

- Exhibit 16.1_Security_Question#_ ABCCorp.xlsx
- Exhibit 18_ImplementationService_ABCCorp.pdf

The attached file must include the filename in the document's header or footer.

6 RESPONSE EVALUATION

6.1 Scoring Criteria

VENDORS MUST PASS THE RFP COMPLIANCE AND ALL MANDATORY REQUIREMENTS IN ORDER TO HAVE THEIR PROPOSALS EVALUATED. Responses meeting the compliance and mandatory requirements will have their proposals further evaluated using the following criteria:

Tier 1 – Proposal Evaluation

- Vendor Qualifications and Higher Education Experience – 10%
- Customer Service – 5%
- Strategic Roadmap – 5%
- Technology Architecture – 10%
- ERP Software Functionality Requirements – 35%
- Implementation Services – 25%
- Price – Proposed 10-year Solution Cost - 10%

Tier 2 - Select vendors from Tier 1 will be invited and required to present and provide a demonstration. Tier 2 will be further evaluated using the following criteria:

- Oral Presentations, Software Demos, Implementation Service Presentations and Reference Checks – 60%
- Updated Pricing – 40%

6.2 Demonstrations and Interviews

Select vendors will be invited and required to present software demonstrations and participate in requested presentations. Due to the current COVID-19 pandemic, it is unclear as of this RFP publication if on-site presentations will be possible. Vendors should plan resource availability to support either remote or on-site presentations with multiple concurrent presentation tracks each day. A final decision regarding the demonstration/presentation modality will be made at the time of the finalist invitation. All invited vendors will use the same presentation modality. Further instructions and expectations of these demonstration and presentation events will be issued at that time.
Sales and marketing materials are not to be presented or electronically delivered. The vendor(s) will also be required to provide a flash drive of all their presentation materials.

Vendors are asked to rank the dates below in order of most preferred and include that information in the Cover Letter. If selected, Owens State Community College reserves the right to schedule demonstrations on dates other than those listed below. Failure to accept an invitation to present may result in a proposal not being considered for further review and evaluation. Planned Demonstration and Presentations will be three days in length and will include multiple demonstrations on the same date/time. Note that software demonstrations are on Day 1 and Day 2, and the Implementation Services will be on Day 3.

Note: All implementation services vendor finalist's presentations will occur the same presentation week as the proposed ERP software vendor's demonstration. The specific day and time will be announced at the time of the finalist's invitation and will occur on the day following the software vendor presentation during that week.

Available Demonstration and Presentation Dates	Order of Preference
Monday, February 21, 2022, to Wednesday, February 23, 2022	_____
Monday, February 28, 2022, to Wednesday, March 2, 2022	_____
Monday, March 7, 2022, to Wednesday, March 9, 2022	_____

Finalists will be notified of their demonstration and presentation dates on Wednesday, January 26, 2022.

Vendors will be expected to base their presentation on a script which will be provided by Owens State Community College approximately three to four weeks prior to the presentation start date.

For planning purposes, the demonstrations will include the following:

- General overview of the vendor(s)' solution, experience, and product roadmap.
- Product demonstrations for student, finance, human resources/payroll, and technical areas organized in multiple, concurrent "tracks."
- Implementation service presentation will include project timeline, implementation approach, and methodology. Vendors are encouraged to include key planned services personnel in this presentation.

Only solutions identified in the proposal and within the cost workbook will be allowed to be demonstrated.

6.3 Proposal Rejection and Waiver of Informalities

This RFP does not obligate Owens State Community College to award a contract or to complete the proposed project, and each reserves the right to cancel this RFP if it is considered to be in its best interest. Owens State Community College also reserves the right to waive minor informalities and, notwithstanding anything to the contrary, reserve the right to:

- Reject any, and all proposals received in response to this RFP;
- Reject any proposal that does not meet RFP compliance requirements;
- Reject any proposal if it is determined that a vendor's ability to work with the existing infrastructure will be too limited or difficult to manage;
- Select a proposal for contract negotiation other than the one with the lowest cost;
- Negotiate any aspect of the proposal with any Vendor;
- Terminate negotiations and select the next most responsive Vendor for contract negotiations;
- Terminate negotiations and prepare and release a new RFP;
- Terminate negotiations and take such action as deemed appropriate.

7 GENERAL TERMS AND CONDITIONS

7.1 Indemnification

Respondent agrees to indemnify the College, its governing board, officers, employees, agents, students, and the State of Ohio from and against any and all costs, losses, damages, liabilities, expenses, demands, and judgments, including court costs, and attorney's fees, which may arise out of the respondent performance of this Agreement, except to the extent such are caused by the sole fault or negligence of the College.

7.2 Governing Law

This Agreement is made under and will be construed in accordance with the laws of the State of Ohio.

All questions relating to the validity, interpretation, performance, or enforcement of this Agreement, and any claims arising from or related to this Agreement, will be governed by and construed in accordance with the laws of the State of Ohio, without regard to the principle of conflict of laws. Any litigation arising from or related to this Agreement may be brought only in the federal or state courts of Ohio with appropriate jurisdiction, and the parties irrevocably consent to the jurisdiction and venue of such courts.

7.3 Contingent Upon Appropriation

It is understood that any and all expenditures of State funds are contingent on the availability of lawful appropriations by the Ohio General Assembly. If the General Assembly fails at any time to continue funding for the payments and/or other obligations that may be due hereunder, then the State of Ohio's obligations under this Contract is terminated as of the date that the funding expires without further obligation of the State.

7.4 Unresolved Findings

The College is prohibited, pursuant to §9.24, from contracting with any respondent against whom the Auditor of State has issued a finding for recovery if the finding for recovery is unresolved. Respondent warrants that it is not subject to an "unresolved" finding for recovery under O.R.C. 9.24. If the warranty is deemed to be false, this Respondent is void *ab initio,* and the respondent must immediately repay to the College any funds paid under this respondent. If at any time during the RFP process the respondent appears on the Auditor's Findings for Recovery Database, such respondent's response shall be disqualified, and any contract award rescinded.

7.5 Suspension or Debarment

Respondent certifies that it is not suspended or debarred by the Federal Government or the State of Ohio from participating in Federal or State-funded projects.

7.6 Absence of Sanctions

Respondent represents that neither it nor any of its owners, officers, or employees have been sanctioned by or excluded from participation in any federal or state health care program, including Medicare and Medicaid. Respondent agrees that if it or any such individual associated with it should become the subject of an investigation relating to health care fraud, abuse, or misconduct, or should be sanctioned by or excluded from participating in any federal or state health care program, including Medicare and Medicaid, it will immediately notify the College contact of such event, and the College contact will have the right to immediately terminate this Agreement without penalty or cost.

7.7 Compliance with Law and Policies

Respondent hereby covenants and agrees that in the course of Respondent's performance of its duties hereunder, Respondent will comply with all applicable federal, state, and local government statutes, ordinances and regulations, and College policies and procedures.

If professional licensing or certification constitutes a qualification for respondent's performance under this Agreement, the respondent will make immediately available, at the College's request, a copy of said certification or licensure.

The respondent warrants that it has complied with all federal, state, and local laws regarding business permits and licenses of any kind, including but not limited to:

- Family Educational Rights and Privacy Act (FERPA)
- Gram-Leach-Bliley (GLB) Act
- Health Insurance Portability and Accountability (HIPAA) Act of 1996
- Privacy Act of 1974
- OSHA Compliance

The respondent agrees to comply with all applicable state and federal laws regarding drug-free workplace and ensure that all its employees while working on state property, will not purchase, transfer, use or possess illegal drugs or alcohol or abuse prescription drugs in any way.

Respondent agrees to adhere to Prevailing Wage laws, if applicable, as pursuant to ORC Chapter 4115.

7.8 Non-Discrimination

In carrying out the Contract, the respondent and any subcontractor or person acting on behalf of the respondent, or any subcontractor, shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, disability, sexual orientation, Vietnam-era veteran status, ancestry, or national origin ORC Section 125.111. The respondent will ensure that applicants are hired and that employees are treated during employment, without regard to their race, color, religion, sex, age, disability, sexual orientation, Vietnam-era veteran

status, ancestry, or national origin. Such actions shall include, but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

The respondent agrees to post, in conspicuous places available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause. The respondent will, in all solicitations or advertisements for employees placed by or on behalf of the respondent, state that all qualified applicants will receive consideration for employment without regard to race, religion, color, sex, national origin, disability, sexual orientation, Vietnam-era veteran status, ancestry, or age. The respondent will incorporate the foregoing requirements of this paragraph in all contracts for any of the work prescribed herein or to be performed in connection with the Contract and will require all of its subcontractors for any part of such work to incorporate such requirements in all subcontracts for such work. Respondent's facilities must meet the requirements of the law to ensure accessibility to the disabled.

7.9 Campaign Contributions

O.R.C. Section 3517.13 are in full compliance with Divisions (I) and (J) of O.R.C. Section 3517.13.

7.10 Ohio Ethics and Conflict of Interest Laws

By submission of a response, the respondent certifies that no member, agent, or employee of the College has or will benefit financially or in any manner inconsistent with Ohio's Ethics laws, Revised Code Chapter 102, from any resulting contract. Any contract arising from this RFP may be terminated by the College if it is determined that any gratuities of any kind were either offered to or received by any of the College's officials, employees, or families from the respondent's agent, or employees. Respondent further agrees to refrain from promising or giving any College employee anything of value that is of such a character as to manifest a substantial and improper influence upon the employee with respect to his or her duties.

Respondent acknowledges that no conflict of interest exists between the respondent and the College, or respondent and its employees, or any members of their families in relation to any College policies or guidelines or state laws. Any person who acquires a conflicting personal interest as of the date the services begin must immediately disclose such interest to the College in writing. The respondent will not participate in any action affecting the services of this Agreement unless the College has determined that such participation would not be contrary to the public interest.

Respondent certifies through its response that it has reviewed and understands the Ohio ethics and conflict of interest laws and will take no action inconsistent with those laws. Respondent understands that failure to comply with Ohio ethics and conflict of interest laws may be ground

for termination of this contract and may result in the loss of other contracts with the State of Ohio.

7.11 Public Records

Respondent understands that any records kept or maintained by the College, including any quotes or pricing of Respondent, may require disclosure under Ohio's Public Records Act, R.C. § 149.43 and Ohio law, and Respondent consents to such disclosure.

7.12 Advertising

No respondent providing products or services to the College will appropriate or make use of the name or other identifying marks or property in its advertising.

7.13 Entire Agreement

This agreement constitutes the entire agreement between the parties and supersedes any previous oral or written agreements between the parties with respect to the subject matter hereof. This Agreement may not be modified, waived, or changed except in writing and signed by both parties.

7.14 Waiver of Breach

A waiver by either party of any term or condition of this agreement in any instance shall not be deemed as a waiver of such term or condition for the future or of any subsequent breach thereof. All remedies, rights, undertakings, obligations, or agreements contained in this Agreement shall be cumulative, and none of them shall be in limitation of any other remedy, right, obligation, or agreement of either party.

7.15 Severability

If any provision of this Agreement or any portion or provision hereof applicable to any particular situation or circumstance is held invalid, the remainder of this Agreement or the remainder of such provision (as the case may be), and the application, shall not be affected thereby.

7.16 Independent Contractor Status

During the term of a resultant Agreement, the respondent shall be engaged by the College solely on an independent contractor basis, and the respondent shall therefore be responsible for all the respondent's business expenses, including, but not limited to, employees' wages and salaries, insurance of every type and description, and all business and personal taxes, including income and Social Security taxes and contributions for Workers' Compensation and Unemployment Compensation coverage, if any.

7.17 Tax Exemption

Owens State Community College is tax-exempt. An exemption certificate will be furnished upon request.

7.18 Permits, Licenses, Taxes, and State Registration

The respondent shall obtain all necessary permits and licenses and abide by all applicable laws, regulations, and ordinances of the State of Ohio, its political subdivisions, and any other states or governmental subdivisions in which work under this Contract is performed. The respondent must furnish appropriate certification of existence or certification of authority to conduct business in the State of Ohio (i.e., a certificate of Good Standing) as a condition of contract award. The certification of existence or certification of authority shall be obtained from the Secretary of State. If the respondent becomes disqualified from doing business in Ohio, it must immediately notify the College and cease performance hereunder until the disqualification is removed. The respondent must advise the College of all address changes.

7.19 Insurance

The respondent shall, at its sole cost and expense, procure and maintain in full force and effect during the term of the contract:

- Workers' Compensation and employer liability insurance covering all of the respondent's employees who are engaged in any work under this contract.
- Public liability and property damage insurance (construed as including respondents' protective and broad form contracted insurance) shall protect the respondent and any subcontractor performing work covered by the contract form claims from damages for personal injury, including death, as well as from operations under the contract, whether such operation is by the Respondent or any subcontractor.
- Automobile bodily injury and property damage liability insurance when the services to be performed require the use of motor vehicles. Such insurance shall be secured from companies licensed to do business in the State of Ohio.

Respondent shall furnish Owens State Community College certificates evidencing this insurance coverage before services are commenced under the contract. All certificates of insurance shall provide that the insurance company will give Owens State Community College thirty (30) days written notice prior to cancellation or any change in the state coverage. Policies evidencing such insurance shall designate Owens State Community College as an additional insured and owner of the policy. All policies shall hold Owens State Community College harmless from any action brought against the respondent for negligence and or for any and all other actions brought against Owens State Community College as a result of this contract, including but not limited to the defense of Owens State Community College.

8 REQUIREMENTS

8.1 Mandatory Requirements

ALL PROPOSERS MUST PASS THE RFP COMPLIANCE AND ALL MANDATORY REQUIREMENTS IN ORDER TO HAVE THEIR PROPOSALS EVALUATED. Mandatory requirements must be responded as directed to as Section 8: Mandatory Requirements.

Responses must include status on availability for the functionality, as follows:

- Yes, the proposed solution meets the requirement
- No, the proposed solution does not meet the requirement

Important: The respondent should complete the single set of mandatory requirements that properly aligns with their proposal.

8.2 Vendor Qualifications

The proposed solution infrastructure will need to be extensive, spanning numerous and diverse stakeholders, and potentially include many technologies that are new to the College. Deployment of these technologies will require coordination among the multiple constituents within the institution. The results will create a dramatically different ERP platform and operations for the College, as well as a shift and improvement in the student experience.

ALL proposers must describe their qualifications in Exhibit 0: Mandatory Requirements to meet the needs to fulfill this strategic set of objectives.

8.3 HECVAT Submission

All vendors must submit a HECVAT assessment with the software proposal.

8.4 Strategic Roadmap

Software proposers must describe how their proposed product roadmap and strategy will ensure the needs of Owens State Community College are met and will be enhanced over decades to come within Exhibit 3: Strategic Roadmap.

8.5 ERP Functionality Requirements

The College seeks a solution that uses a comprehensive ERP environment. The ERP must support the institution by administratively securing data for transactional processing and reporting by department or other designation that may occur.

An integrated data solution will need to support the current and future state of the College and create a seamless user experience for students, faculty, and staff within the organization. The ideal solution will enable students to see and engage in opportunities across the College,

ensuring that all activities are recognized on the institution's record of student information. All processes should center on a student life cycle rather than an administrative life cycle.

The requirements identify key functionality that Owens State Community College is looking for in the ERP administrative application.

- Understanding that no solution will provide all the described functionality, Owens State Community College is looking for the solution (or combination of solutions) that best meets the most requirements for the broadest range of stakeholders.
- The functionality captured is a summary of the most significant requirements for each functional process area identified. Expectations are that a robust, comprehensive solution will also provide the standard functionality that is expected of any leading ERP solution in higher education.
- The functionality required supports Owens State Community College's desire to consolidate auxiliary solutions by exploring the options available for replacing or integrating current solutions with the proposed ERP solution.

Overall Instruction: It is assumed that the functionality from the proposed ERP solution will function identically for all Owens State Community College constituencies: including, but not limited to prospective students/applicants, current students (credit/non-credit/workforce), former students, financial aid applicants, employees/staff, adjunct and full-time faculty, vendors, corporations, grantors/funding agencies, and contractors. If not, the vendor must also articulate how it will work for different constituents. Further, if multiple solutions or third parties are utilized for different functions or different constituents, that solution must be clearly articulated and the functionality described.

Software proposers must respond to each question using the Exhibits 0 – 19 itemized on page 38. The responses to scenarios are expected to be appropriately detailed in the response area. The required documentation should be attached where directed. As needed, a response may be attached as well if the tool's character limit is too restrictive. Responses must include status on availability for the functionality, as follows:

- **Meets Requirement:** Functionality is included in the proposed solution and available in the current release.
- **Partially Meets Requirement:** Functionality is partially available in the proposed solution. Vendors must provide comments describing what is and is not available or if some functionality will be delivered in a future release.
- **Meets with Future Release:** Functionality will be available in a future release. Vendors must provide the anticipated release date in the Future Release Date column and describe anticipated functionality in comments.
- **Meets with a Proposed Third-Party:** Functionality is available as part of a proposed third-party solution. Indicate the solution name in the Name of Third-Party Software column and include comments describing how integration will be provided and maintained.

- **Requires Custom Build:** Functionality can be provided with custom modifications. Vendors are requested to add more information regarding how the requirement can be met comments.
- **Not Available/Proposed:** Functionality is not available or will not be proposed.

All costs should be outlined in Exhibit 20: Costs Proposal Workbook.

8.6 Implementation and Ongoing Support Services

Owens State Community College requires implementation services be proposed to support the implementation of every proposed ERP solution, either by the primary software vendor or by an implementation partner. Implementation services should include a comprehensive program covering all phases of the project, from planning through post-implementation support. Owens State Community College seeks an implementation services vendor team to provide implementation, integration, and change management services as part of the implementation of the proposed ERP solution. The implementation services team will be responsible for the implementation of the proposed ERP solution(s), including but not limited to project oversight, configuration, implementation, testing, reporting, scoped integrations, data migrations, documentation, and training materials. The implementation services team must demonstrate experience and success in implementing a cloud-based enterprise solution ERP environment while successfully guiding the organizations through this transformative change.

All Services proposers must articulate how the proposed vendor's implementation services team will ensure the needs of the Owens State Community College are met by responding to the questions within Exhibit 18: Implementation Services.

Software vendors and any other appropriate vendors must reply to Exhibit 19: On-going Support Services.

Responses to Exhibits 1, 18 and 19 should include an appended proposed Statement of Work (SOW) for the proposed Owens State Community College services.

All costs should be outlined in Exhibit 20: Costs Proposal Workbook. Please note that Owens State Community College Requests that the Implementation Services provider complete cost line item in the costing proposal workbook for Federal and State Mandated/Required Reports under the OPTIONAL / RECOMMENDED SERVICES - technical support tiers, optimization services, services for system development and performance review, security section.

9 APPENDICES

9.1 Appendix 1: List of Institutional Integrations

Owens State Community College has several current third-party solutions, some of which may be decommissioned as a part of the ERP project. Considering the technology integration requirements, below is a descriptive chart to aid in crafting vendor responses.

Vendor System	Description
Accudemia	Tutoring software
Accuplacer and ACT Tests	Import student test data into SIS
Ad Astra Schedule	Classroom and Event Scheduling
ArmyIgnitED Veteran Student	Veteran Student Information Data Exchange
ATC XML Transcript Interface	Electronic transcript exchange with Ohio public schools
Blackbaud Award Management	Scholarship Management
Blackbaud Raisers Edge	Fundraising & Donor Management
Blackboard Connect-Ed	Emergency alerts and notifications
Blackboard Learn	Learning Management System
Bluemen	TRIO services
Broadcom Applications Manager	Enterprise Job Scheduling
CampusLabs Engage	Student Engagement
Comevo Online Orientation	New Student Orientation
Credentials Transcript	Transcript processing
Data export and import processes	for NSLC, grants etc.
Digarc Acalog	Catalog Management
Digarc Curriculog	Curriculum management
eCampus	Online Bookstore system
EdAmerica	Default case management and outreach
Ellucian DegreeWorks	Degree audit system
Ellucian Elevate	Non-credit course management, registrations
Ellucian Experience	Employee and Student Portal
Evisions Argos Reporting	Enterprise Reporting Tool
Evisions Intellecheck	Check printing and payment processing
Fifth Third Bank	Student Refund and Payroll file data exchange
Fundriver	Endowment Fund Management

Hyland Onbase	Document Management System, Unity Forms, Workflow
Maxient	Student Conduct
Mongoose Cadence	SMS text communications
Nelnet QuikPay and Commerce Manager	Tuition and vendor payments
Pearson Labs Math Student	Digital learning platform
People Admin	Applicant Tracking & Position Management
ReUp	Re-enrollment outreach
RS2 AccessIT	ID Card Printing and Door Access Management
Runner Technologies Clean Address	Address verification
Sierra Library software	Library management
TD Client	Dept of Ed data files exchange
Vector Solutions Student and Employee Files	Title IX Training

9.2 Appendix 2: Definition of Terms

Wherever and whenever the following words occur in this proposal, they have the meaning given here:

Term	Definition
Academic Planning	Student process supported by Advising staff to map out a student's academic schedule to reach degree completion.
Owens	Owens State Community College.
Customized Training	All non-credit instruction with an occupational/professional focus offered to the general public, or all credit and non-credit instruction offered via contract to a specific customer.
Digital badge	A validated indicator of accomplishment, skill, quality, or interest. Open digital badging makes it easy to issue, earn, and display badges across the web through an infrastructure that uses shared and open technical standards.
Environment	Self-contained copy of the ERP system. For Owens State Community College, the solution would include the following environments: - Production – Single repository of live data actively being used. Includes a sandbox environment where staff can experiment with new configurations and workflows. - Testing – Environment used for testing new features, enhancements, or changes before moving into the production environment - Training – Environment used for training - Staging – Environment used to stage moves of changes between environments or into production - Development – Environment used for the development of new features
ERP	Enterprise Resource Planning
ERP Solution Descriptions	ERP Solutions include the following: - Core Solution –the primary core ERP solution. - Non-Core Solution – not part of the core ERP, but the solution is owned and integrated by the software vendor.

Term	Definition
	- Third-Party Solutions – external software product not owned by the software vendor.
Instructional Type	An Instructional Type is coded to each credit-based course section to categorize how the class is structured (lecture, lab, lecture/lab, etc.). This field is also used to calculate certain faculty payments that are contingent on student enrollment.
Special Populations/Cohorts	A group of people banded together or treated as a group in a degree program or course of study.
Stackable program	Credentials in a hierarchy with one level building on another, enabling the learner to progress toward a higher degree.
The College	Owens State Community College.
Vendor delivered interface	Automatic – not manual – interface between two or more different systems to exchange information that is provided, maintained, and supported by the software vendor.

9.3 Appendix 3: List of Future State Process Maps

9.3.1.1 Human Resources & Payroll

- Develop & Implement Human Resources Plans
- Organizational Charts
- Classification and Re-Classification
- Request to Fill Position
- Position Management
- Process #6: HRS Post Vacancy
- Hiring Manager/Search Committee Management
- Select and Interview Candidates
- New Hire, Re-hire, and Transfer
- Close Posting
- Onboarding
- Manage Employee Information
- I-9 Employment Eligibility
- Independent Contractor Agreement
- Onboard and Offboard Non-Employees
- Death of an Employee
- Voluntary Separation/Retirement
- Involuntary Separation
- Manage and Administer Benefits
- Manage Employee Insurance Eligibility & Enrollment Monitoring
- ACA Eligibility Tracking and Reporting
- Manage Employer HSA, Flex Spending Eligibility & Payment
- Manage Deductions in Arrears
- Retirement Eligibility
- Manage Employee Supplemental Retirement Eligibility
- Voluntary Deductions
- Administer EE Tuition and/or Professional Development Waiver
- Tuition Reimbursement
- Manage and Administer Compensation
- Compensation Changes
- Additional Pay Requests
- Personnel Action
- Manage Performance Evaluation
- Performance Improvement Plan
- Professional Development Training
- Manage Employee Skills and Competencies
- Maintain Employee Skills and Competencies
- Manage Assignments
- Disciplinary Action
- Grievance Procedure

- Succession Planning
- Employee Self-Service (ESS)
- Human Resource, Payroll, and Manager Self-Service (MSS)
- Manage FMLA, Injury, and Illness
- Manage Leave Accrual
- Manage Leave Requests
- Manage Leave Donation
- Reporting Concept Document
- HR & PR Compliance Reporting Concept Document
- Update IPEDS Master Setup
- Update Position and Employee's IPEDS Information
- Run IPEDS Report
- Payroll Setup
- Time and Labor Management
- Labor Distribution
- Payroll

9.3.1.2 Finance

- Chart of Accounts
- Bank Reconciliation
- Journal Entries
- Annual Budget
- Budget Modification
- Purchase Requisitions
- Receiving
- Invoice Processing
- Direct Pay
- Issue Payment
- Expense Reimbursement
- Fixed Asset Record
- Asset Disposal
- Student Receivables
- Invoicing
- Apply Payments
- Past Due Account Management
- Purchasing Cards

9.3.2 Student

9.3.2.1 General

- Approval Workflow
- Appeals Workflow
- New & Existing Records Match
- Managing Communications and Outreach

9.3.2.2 Recruitment & Admissions

- Prospect/Inquiry Management
- Pre-Applicant Communication/Cultivation
- Recruiter/Admission Representative Assignment
- Application Management
- Selective Program Admissions
- Enrollment Checklist Management
- Assessments Intake and Course Placement
- Non-degree Application
- Prospect/Applicant Conversion
- Dual Credit/Enrollment Cultivation and Admission

9.3.2.3 Advising, Student Planning, & Degree Audit

- Advisor Assignments
- Advising Lifecycle
- Alerts & Interventions
- Initial Advising & Student Onboarding
- Cohorts & Group Management
- Grant Funded Onboarding & Advising
- Veteran Services
- Advising Appointments & Referrals
- Live Advising Appointment Setting
- Student Planning & Degree Audit
- Student Complaints
- Probation & Suspension
- Student Judiciary Services
- Tutoring Planning & Hiring
- Tutoring Center Operations
- In-Person Tutoring Services

9.3.2.4 Student Records & Registration

- Academic Records & Registration Setup
- Student Information Change
- Student Records Requests
- Academic Program Type Changes
- FERPA
- Student Cohorts & Groupings Management
- Transfer Credit Evaluation and Appeal
- SEVIS Monitoring
- Grading & Grade Changes
- Satisfactory Academic Progress, Academic Standing, and Honors
- Failed/Missing Requisites
- Application and Certification of Award Completion

- Commencement Activities
- Registration Priorities Set-up and Assignment
- Registration and Course Withdrawal Activities
- Registration Overrides or Exceptions
- Waitlist Management
- Registration Cancellation for Non-Payment/Funding Source
- Course/Offering Management
- Program Development

9.3.2.5 Career & Technical Education

- Marketing, Recruitment & Onboarding
- Nurture Campaign Process
- Initial Course Creation
- Create Schedule & Catalog
- Registration
- Waitlist Management
- Unpaid Registrations
- Fee-for-Service
- 3rd Party & Sponsored Billing
- 3rd Party & Sponsored Payments
- Collections Activity
- Reporting Requirements Concept Document
- Communications Concept Document
- Catalog Management
- End of Course Follow Up
- Business & Vendor Contract Management
- Instructor & Contractor Management
- Attendance

9.3.2.6 Academic Scheduling & Planning

- Course & Program Management
- Scheduling Setup
- Schedule Changes Before Publication & Registration
- Schedule Creation & Changes After Registration Start
- Failed & Missing Requisites
- Hold Management

9.3.2.7 Financial Aid & Student Accounts

- Financial Aid Setup
- FAFSA/ New & Corrected Applications
- NSLDS and Transfer Monitoring
- Need Analysis, File Review & ISIR Corrections
- Financial Aid SAP
- Financial Aid SAP Appeals

- Assignment of Cost of Attendance
- Packaging and Repackaging
- Fund Monitoring and Reconciliation
- Federal Work-Study
- FA Over-award Adjustments & Potential Fund Return
- Student Loan Origination
- Direct Loan MPN, Entrance Counseling, and Loan Aggregate
- PLUS Loan
- Private Student Loans
- Direct Loan Exit Counseling
- Aid Applied
- Pell & Direct Loan Originations & COD Disbursements
- Return of Federal Funds (R2T4)
- Processing Charges
- Refunds
- Third-Party Payment Processing
- Student Payments
- Student Collections

9.3.2.8 Advancement

- Faculty and Staff Updates
- Organizational/Corporate Record Management
- Scholarship Fund Creation & Management
- Scholarship Fund Reporting
- Scholarship Awarding
- Gift Entry
- Pledge Management
- Gift Reconciliation
- Payroll Deduction

9.4 Appendix 4: List of Required Federal and State Reporting Requirements

9.4.1 IPEDS requirements https://nces.ed.gov/ipeds/

1. IC Header for public 2-year degree-granting institutions
2. Institutional Characteristics for degree-granting 2-year academic year tuition reporters
3. Completions for all institutions
4. 12-month Enrollment for 2-year degree-granting institutions
5. Student Financial Aid for public institutions reporting on a fall cohort (academic reporters)
6. Graduation Rates for 2-year institutions reporting on a fall cohort (academic reporters)
7. 200% Graduation Rates for less-than-4-year institutions reporting on a fall cohort (academic reporters)
8. Outcome Measures
9. *Human Resources Reports File* - Human Resources for degree-granting institutions and related administrative offices that have 15 or more full-time staff and a tenure system
10. Fall Enrollment for 2-year degree-granting institutions
11. *Finance Reports File* - Finance for degree-granting public institutions using GASB Reporting Standards
12. *Library Reports File* - Academic Libraries

Note IPEDS is in the process of discussing the possibility of reporting non-credit information.

9.4.2 HEOA https://www2.ed.gov/policy/highered/leg/hea08/index.html

9.4.3 HEI File Requirements https://www.ohiohighered.org/hei

1. Academic Programs – IR Office
2. Capital Planning – Finance Office
3. Choose Ohio First – Financial Aid Office
4. College Credit Plus (CCP) – IR Office
5. Enrollment -IR Office
    a. AC Alternate Credits (transfer credits)
    b. CI Course Inventory
    c. CN Course Enrollment
    d. CU Credit Update
    e. DC Degree Certificate Earned
    f. IC Identifier Change
    g. OC Off-Campus Course Sections
    h. SE Student Entrance
    i. SN Student Enrollment
    j. ST Course Sections Taught
    k. XR Cross Registration We do not report
6. Facilities – IR and Facilities Office
    a. AI Area Inventory
    b. CS Course Section Schedule

    c. FC Facilities Identifier Change
    d. OR Other Use of Instructional Rooms
    e. OS Other Source of Funds
    f. PS Physical Structure Inventory
7. Faculty-Staff – IR and Human Resources Office
    a. AM All Employee
    b. FD Faculty and Instructional Non-faculty Demographics
    c. IC Identifier Change
    d. ST Course Sections Taught
8. Financial – Finance Office
    a. BD Budget Data
    b. CF Current Funds
    c. CP College Expenditure
    d. CX Campus Expenditure
    e. EE Education and General Funds Expenditure
    f. FF Faculty and Instructional Non-faculty Funding – IR and Finance Office
    g. FX Funding Unit Expenditure
    h. IO Instruction and General Expenditures by Object
    i. SR Sources of Education and General Revenues
9. Financial Aid (General) – Financial Aid Office
    a. NEALP
    b. OCOG
    c. WOS
10. Ohio Innovation Exchange (OIEX) – Do not report
11. Unit Record Tuition and Financial Aid
    a. TF Undergraduate Tuition & Fees – IR and Student Accounts Office
    b. UF Undergraduate Financial Aid – Financial Aid Office
12. Fees Inventory – Finance Office
13. Non-Credit Program Inventory – IR and WCS Office

10 EXHIBITS

Vendors must complete the following exhibits when responding to RFP requirements based on the proposal option pursued. See the Notice and instructions above for additional information and expectations. Each exhibit's document(s) can be found attached to this proposal.

	Exhibits
0	Mandatory Requirements – all proposals
1	Vendor Qualifications – all proposals
2	Higher Education Institution Experience – all proposals
3	Strategic Roadmap – unified and software proposals
4.1 4.2	General Requirements and Scenarios - unified and software proposals
5.1 5.2	Constituent Relationship and Engagement Management Requirements and Scenarios – unified and software proposals
6.1 6.2	Finance Requirements and Scenarios – unified and software proposals
7.1 7.2	Human Resources and Payroll Requirements and Scenarios – unified and software proposals
8.1 8.2	Academic Curriculum and Scheduling Requirements and Scenarios – unified and software proposals
9.1 9.2	Recruitment and Admissions Requirements and Scenarios – unified and software proposals
10.1 10.2	Advising and Student Success Requirements and Scenarios – unified and software proposals
11.1 11.2	Records and Registration Requirements and Scenarios – unified and software proposals
12.1 12.2	Financial Aid Requirements and Scenarios – unified and software proposals
13.1 13.2	Continuing Education and Workforce Solutions Requirements and Scenarios – unified and software proposals
14.1 14.2	Reporting, Self Service, and Workflow Requirements and Scenarios – unified and software proposals
15.1 15.2	Integration Requirements and Scenarios – unified and software proposals
16.1 16.2	Technical Requirements and Scenarios – unified and software proposals
17.1 17.2	Data Management Requirements and Scenarios – unified and software proposals
18	Implementation Services – unified and services proposals

19	Ongoing Support Services – unified and software proposals; services proposals as needed
20	Cost Proposal Workbook – all proposals

11 ATTACHMENTS

The following Attachments have been provided to offer further context around the RFP.

11.1 Attachment 1: Owens State Community College Bid Form

11.2 Attachment 2: Owens State Community College Rights and Conditions Form

OWENS STATE COMMUNITY COLLEGE

Name of Proposal

BID FORM

FEDERAL TAX ID NO. _____

RESPONDENT NAME: _____

ADDRESS: _____

_____

TELEPHONE NUMBER: _____

PRINCIPAL OFFICER'S SIGNATURE: _____

NAME OF SIGNEE: _____

(Please Print or Type)

TITLE: _____

DATE: _____

OWENS STATE COMMUNITY COLLEGE RIGHTS AND CONDITIONS

It is required that your proposal include the following acknowledgments signed by either the owner or an officer of your firm.

COLLEGE RIGHTS AND CONDITIONS ACKNOWLEDGEMENT

Does respondent acknowledge and agree to: • Submission Deadline and Certain College Rights • Projected Timeline • General Conditions	Yes	No
Do you acknowledge that all submitted proposals and information included therein or attached thereto are considered as public record upon delivery to the College?	Yes	No
Do you agree to comply with all applicable federal, state, and local laws, rules, regulations, or ordinances and shall hold the College harmless from any liability from failure of such compliance?	Yes	No
Do you certify that none of your directors, principal officers, or employees are employed or affiliated with the College? If no, then please provide their name(s) and title(s).	Yes	No

By:

_____
Signature

_____
Printed Name

_____
Title

_____
Company

_____
Date