ERP RFP Questions/Answers as of 12/03/2021

1. 4.1.3 Proposal Responses – Requesting an extension of the due date for the responses to January 7, 2022 2:00 pm EST.

   Owens State Community College has approved an extension of the deadline for the vendor RFP proposal responses to no later than **Dec 30th, 2021 at 2:00pm EST**. No further extension will be considered.

2. Whether companies from Outside USA can apply for this? (Like, from India or Canada)

   While companies outside the USA may submit an RFP, please note that access to the college data will not be allowed outside the USA and access to the college network may be limited.

3. Whether we need to come over there for meetings?

   Owens is open to in person and remote. Please respond how this would be managed with your methodology explanation and within the SOW.

   Note that due to COVID restrictions, onsite work may be limited.

4. Can we perform the tasks (related to RFP) outside USA? (Like, from India or Canada)

   See response to question 2.

   Access to the college data will not be allowed outside the USA and access to the college network may be limited.

5. Can we submit the proposals via email?

   Yes, please see section 1.1 of the RFP. Request for Proposal which states All proposals should be clearly marked "Enterprise Resource Planning System" and addressed to Sweta Thakker at erpevaluation@owens.edu. Please provide the files in a zipped file to minimize the number of emails and attachments. 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.

6. Section 4.1.1 - Exhibit 2, where does exhibit 2 go under this format?

   Exhibit 2 can be attached as a separate document. The main RFP response should be submitted as one complete document. All the exhibits will be separate files. The exhibits that are Excel files for the requirements should be submitted as editable Excel files. Please do not change, add, or delete columns or rows. The exhibits that are word

documents for the scenarios should be submitted as word documents or pdf documents. Please do not change add or delete any questions or other content.

7. What do we mean by a digital copy do we email the files, or do we need to provide a USB drive?

    Owens State Community College is requesting all RFP responses to be sent via email to Sweta Thakker at erpevaluation@owens.edu. Please zip files together to avoid too many attachments and emails. There is no need to send a USB drive.

8. If asking for a excel spreadsheet, should it be kept as an excel spreadsheet

    Yes, excel spreadsheets are required to remain as excel spreadsheets for calculations. All the exhibits will be separate files. The exhibits that are Excel files for the requirements should be submitted as editable Excel files. Please do not change, add, or delete columns or rows.

9. Can the due date be extended?

    See question 1.

    Owens State Community College has approved an extension of the deadline for the vendor RFP proposal responses to no later than Dec 30th, 2021 at 2:00pm EST. No further extension will be considered.

10. If a question is posted on the website, will we get notified?

    No, you will need to monitor the website at least regularly until all answers are posted on December 3rd. Questions and answers will be updated and posted on a rolling basis as received.

11. Can you provide additional background on why the institution is moving in this direction? Is there more content than what is listed in the RFP?

    Currently, Owens State Community College runs an on-premise Ellucian Banner ERP system. The College is exploring moving to a cloud-based ERP system. The goal is to obtain better operational efficiencies and strategic goal alignment with a modern and optimized ERP solution. Additionally, the College wishes to improve Disaster recovery to meet RPOs and RTOs.

12. How does an implementor submit with a vendor? Do they just refer to the vendor responses?

    Refer to section 8.6 on page 36 in the RFP. This section explains four Exhibit files that Implementation Services Vendors should provide – 1, 18, 19 and 20.

An implementation vendor can partner and propose with a software vendor and create a unified proposal. Additionally, an implementation vendor may submit independently, but will need to identify which software solution they are proposing to implement. Implementation Services Vendors only need to submit the implementation partner information as requested in the RFP.

13. Student workers in section 2.3 are they work study, no-work study, or both?

Both

14. For full-time staff headcount, you have 143. Are they all full-time? How many part-time?

There is a correction to the Staff and Faculty headcount numbers that were provided in the RFP document. Below are the updated numbers (also shared in the addendum)

Staff Headcount (excludes instructional staff)

- Full-time 335
- Part-time 38

Faculty Headcount

- Full-time 114
- Part-time 462

15. For student headcount, can you share the IPEDS FTE count instead of headcount?

IPEDS FTE count stated in 12-month enrollment 2021-2022 is 4593.

16. In section 18.2, is it possible to clarify what you are expecting from question #4?

Question #4 from 18.2 section from Exhibit 18 Implementation Services asks you to Identify all implementation service providers for the proposed solution (i.e., applications/modules).

If you are proposing with another vendor (i.e., not implementing the entire solution as one company), then you will need to identify any partner who will work with you to implement.

17. Regarding CRM, how many full users (able to configure the system, update settings/workflows, write reports, use live chat, own cases) do you anticipate will access the solution?

10-15 users

18. Regarding CRM, how many light users (create and update contacts, run/ view pre-written reports, manage communication and events) do you anticipate will access the solution?

15-20 users

19. Regarding CRM, how many chat users do you anticipate will access the solution?

10 staff users. The estimated number of prospective students is 11,500.

20. Regarding Finance/HR/Payroll, how many full access users (able to configure the system, update settings/workflows, perform accounting and finance back-office tasks (AP, AR, GL, process transactions, generate financials), write reports, approve and manage budgets, and other higher-level functions) do you anticipate will access the solution?

The Controller, Student Accounts, and Budget offices have 16 employees. HR & Legal have a total of 9 employees.

21. Regarding Finance/HR/Payroll, how many limited access users (only able to view pay stubs/W-2s, view and select benefits, update personal information (address, demographic info), submit and approve timecards and expense reports, submit budget and purchasing requests) do you anticipate will access the solution?

All Employees will need the ability to review pay stubs/W-2s, view and select benefits, update personal information and submit timecards or leave reports. There are approx. 75 budget authorities who would need to submit budgets. There are approx. 100 user who would need access to purchase orders and expense reports.

As mentioned above – all employees will need limited users access. In addition, terminated employees may need a limited access for a number of days to retrieve any final documents they may need.

22. Can you provide the totals for each of the following?
    - Number of Full-Time Faculty   - 114
    - Number of Part-Time Faculty   - 462
    - Number of Departmental Administrators/Managers   - Around 100
    - Number of Regular FT Employees   - 335
    - Number of Regular PT Employees   - 38
    - Number of Student PT Employees   - 30
    - Number of W2's (Annual)   - Around 1300

Approximately 28-30 student workers; however, this number is lower this year than normal due to the current labor market. Student workers are part-time.

23. Are you facing any expiring contracts / sunsetting of legacy systems that requires you to be live with HCM, Payroll, Financials, and/or Student by a certain date? If so, please elaborate.

For several reasons, including the expiration of current contracts, our preferred go-live dates are -

- Finance - no later than July 1st, 2023
- HCM and Payroll- no later than January 1st, 2024
- Student as soon as possible

24. In Exhibit 18 there is a section that reads," Responses to ALL questions should include a status on availability for the functionality prior to the scenario response, as follows:"

   a. Yes, functionality is available now as part of the proposed solution
   b. Partially, portions of the functionality can be met within the proposed solution (explain in detail)
   c. Yes, functionality will be available as part of a future commercially available release (provide estimated release date)
   d. Yes, functionality is available as part of a proposed third-party solution (provide third-party solution name)
   e. No, functionality is not available but could be through a custom build only
   f. No, functionality is not available in the proposed solution

   Will those be necessary for the implementation services responses as it seems to be more software focused?

   Yes, please consider functionality to be part of the service you provide.

25. In the RFP, Section 3.3.5 Finance,
   a. On page 14 you mention Inventory Controls. Can you provide insight into how you track and manage inventory today?

      The College maintains fixed assets within the Fixed Asset module in Banner. All other inventories are maintained in excel.

   b. On page 14 you mention the need for "separate 501c (3) organizations" …how many FEIN will be tracked/managed in the new solution?

      There will be only one separate 501c(3) organization maintained in the ERP, which is our Foundation.

   c. On page 15 you refer to Accounts Receivable but in reference to tuition. Can you provide insight to the non-student accounts receivable (number of customers, volume of transactions, billing cycles, invoices, etc.)?

      For non-student accounts receivable, there are around 500 transactions per year totaling up to 1-1.2 million dollars. We have about 100 customers. There are 75-80 invoices each month that are on a 30-day billing cycle while there are 5-10 that are invoiced annually or every six months.

26. In the RFP, Section 3.3.6 HCM,

a. When is your Open Enrollment for Benefits?

Open Enrollment until 2022 has is in October with a benefit start year of 1/1/XX. Starting in 2022, open enrollment will be in February with a benefit start year of 4/1/XX.

b. Can you describe the cycle for Performance Management and the review process?

Prior to 2022, Performance Appraisals were due twice a year to HR. Self-Evaluations and Manager appraisals were sent to HR for review and filing. In 2022, appraisals will be conducted once a year start in Spring with anticipated cycle closing of 6/30/xx. Reviews will need to have a Self-Evaluation, Manager Review, Managers-Manger sign-off and HR review. Once completed the evaluation should go back to the manager for a 1x1 meeting with the employee. The meeting should be logged/dated and submitted in the system as complete.

27. In the RFP, Section 4.1.3 Proposal Responses
    a. Will the college accept a PDF format instead of the suggested MS Word format?

    Yes, the proposal document will be accepted in a PDF format.

    b. What is the difference between the electronic copy of the written proposal and the separate digital copy as referenced in the first two sentences?

    Both sentences refer to the same written proposal document which can be submitted in a MS Word or PDF format. With that, a Cost Proposal document should also be submitted in editable Excel format.

28. In the RFP, Section 7 does not make reference to the Buy Ohio program which is a common strategic sourcing initiative for Ohio state agencies. Will this be part of the RFP response?

    This will not be part of the RFP.

29. In the RFP, Section 8.3 HECVAT Submission
    a. This is not listed as a requirement under 4.1.1, however, it was displayed during the bidder's conference as part of that section. Can you clarify?
    b. Where is the form?
    c. In section 8.3 it makes reference to "All vendors must submit a HECVAT assessment with the software proposal" however shouldn't this be for "all software proposers" or must the potential implementation partners complete this assessment?

    This should be a standard document that all software vendors should have already completed and is for the software vendors only.

30. In the RFP, Section 9.1 Institutional Integrations
    a. Can you provide a list of your current/expected integrations for HCM/Payroll (i.e.: benefits carriers, administrative systems, banking, etc.)

    In addition to the current integrations listed in section 9.1 (pages 34-35) of the RFP document, we would need the ability to upload financial transactions. In most cases, these would be Excel files in a specific template to upload. If the ERP does not have a solution for Elevate system (non-credit registration), we would need integration.

    b. Can you provide a list of your current/expected integrations for Financials (i.e.: cash management, banking, supplier punch-outs, electronic invoicing, JE imports, etc.)

    HR does not have benefits integrations at this time and does use a third-party background screening provider (HireRight). The future system should include benefits integration with carriers, enrollment purposes and for reporting.

31. In Exhibit 0, tab for Services only, section 0.3 for Data Ownership and Storage Q#1 - During implementation, does all data in the ERP solution remain in the United States?
    a. This seems to be reliant on the software vendor. Can you clarify how this question might apply to the services partner?

    This is for both software and services vendors. On shore (domestic) resources should only have access to Owens' data. No offshore access to the data or no data moving offshore will be allowed.

32. In Exhibit 18, section 18.2,
    a. Is it possible to clarify what you are expecting from question #4?

    Yes, please see the response to question #16 above.

    b. Question #9 refers to future state business process mapping in Appendix #3. Where can we find Appendix #3?

    Appendix #3 is in the main RFP document starting on page 38.

33. In Exhibit 18, section 18.3 Project Management
    a. It appears the HCM team is not represented
    b. It appears the Student team is listed under the HCM heading
    c. Can you update?

    Updated list has been added to the Addendum.

34. In Exhibit 18, section 18.4 Project Staffing

a. Question 1d asks the implementation partner to indicate if resources are offshore. Is Owens subject to Executive Order 2019-12D or is it possible that it has been rescinded?

The College is exempt under Section 4(b) of the Executive Order 2019-12D.

35. In Exhibit 20, Vendor Assumptions tab
   a. If we need more than the allotted assumptions, can we simply add rows?

   Yes, as stated in line #3 on Vendor Assumptions sheet, please add lines as needed.

36. Section 2.3 Institutional Metrics,
   a. Please provide the latest reported Student FTE counts for IPEDS

   Refer to Question #15 above.

   b. Please provide count for any Students not reported to IPEDS

   147

   c. Staff headcount is shown as 143, how many are full-time and how many are part-time?

   This number was corrected and posted in the addendum available at www.owens.edu/procurement. Also refer to Question# 14 above.

37. Section 6.1.10 Student Accounts Question #19 - The ability to support award templates or authorization wizard forms (include funding attributes, institution, and student identification) that could be completed by the Business Office or third-parties. Explain.

   Please provide additional information and examples of award templates or authorization wizard forms. What kind of forms? Are these forms ad-hoc based on the needs of a student? Is it information provided to all students?

   In this scenario, if a company is paying for a student's tuition, the company would have an online form where they could enter the "award" info - how much they'll pay, what they'll pay for, billing info, student info, etc. and be able to authorize the institution to pay for those based on that template.

38. Section 10.1.2.3 Clinical Rotations - The ability to assign required items to a checklist for a student for each clinical rotation opportunity, based on rules and criteria?

Please provide additional information and examples of items that would be on a checklist and if action is needed by the student.

Certain clinical rotations have requirements that we would like to track (i.e. immunizations and vaccination requirements). We would like to be able to assign to a student who is registered for a clinical rotation or in a certain program of study a list of those requirements. Additionally, we would like to be able to add instructions for completion of a checklist item and/or be able to tie it to an action within the system such as uploading documentation.

39. What version and product is Owens CC using from OnBase? Which functional areas across the campus are using OnBase? Please provide some detailed scenarios. Is Owens CC using the workflow engine within OnBase?

Owens CC is currently using OnBase Foundation EP1 19.8.5.1 version. OnBase document imaging and importing functions are used by several departments across the College. A few examples are Records Office, Financial Aid, Student Accounts, HR, Contracts etc.

Owens CC has also created some digital forms using OnBase Unity Forms Designer.

OnBase Workflow Engine is being used for processing Unity Forms and Document Retention.

40. Section 11.1.2 Academic Records Set-Up Question #8: The ability for flexibility with the academic calendar to incorporate start/end dates that work outside of a standard term? Please provide additional clarification on the current calendar structure at Owens.
    a. Does the Institution have courses which overlap standard period dates (i.e., begin during one standard period and end in another standard period)

       Yes, we do have classes that overlap standard terms.

    b. Does the institution have staggered attendance patterns, where the optional academic period varies based on the student?

       Yes, we do have multiple parts of terms within our main term.

41. Section 13.1.3 Registration Question #3: The ability for the student to be able to have shopping cart functionality.
    a. Does the institution have open access enrollment where non-matriculated students can apply/pay/register all at once through a public facing course catalog in a degree seeking program of study (other than non-credit, continuing education students)?

b. Is shopping cart functionality currently available to all students (degree seeking and non-degree)?

Currently this option is only available for non-credit students.