# REQUEST FOR PROPOSAL

## for

## Southwest Wisconsin Technical College

## ERP System

## RFP #1920-01

## Addendum #2

Questions submitted by ERP vendors have been answered by the Southwest Tech ERP Steering Committee to the best of their ability.

Donald L. Tuescher
Secretary of the Southwest Wisconsin Technical College District Board

Q1:  Just an FYI that we will need an extension because our RFP team requires 6 weeks to respond to RFPs, is it possible for an extension?

A1:  **The intent to bid deadline was extended from 8/30 to 9/4.  The 10/4 proposal response required date will not be extended.  RFP release date of 8/22 through RFP response required date of 10/4 is six weeks.**

Q2:  My apologies as our first interaction is my emailing to state that we would like to respond to the Request for Proposal #1920-01 for ERP System for Southwest Wisconsin Technical College.  We mistakenly believed we had until EOD.  We understand if we have missed the deadline.

A2: **The deadline for intend to bid has been extended to 12:00 pm EDT Wednesday, September 4, 2019.**

Q3:  We respectfully submit the following request:  Please provide the Proposal Submission Form referenced in the RFP.

A3:  **<u>Section 3.2.1 General</u> will now read as follows:**

**Addenda issued during the time of bidding shall become a part of the RFP documents. ~~Respondents shall acknowledge receipt of such addendum in the appropriate space provided on the Proposal Submission Form~~. Failure to examine any and all documents will in no way relieve the successful Respondent from the necessity of performing any work that may be required to complete the work in accordance with this RFP.**

**The College shall not incur any liability for any costs incurred by the Respondent in submitting a proposal in response to this RFP.**

**Southwest Tech is an Equal Opportunity Employer and Educator operating under an Affirmative Action Plan.**

**<u>Section 3.5.3 Binding Offer</u> will now read as follows:**

**Proposals shall be signed and dated by an engagement partner authorized to bind the Proposer in legal matters. A proposal submitted in response to this RFP shall constitute a binding offer. ~~Acknowledgement of this condition is indicated on the "Proposal Submission Form" by the signature of the Proposer or an officer of the Proposer legally authorized to execute contractual obligations.~~ By submitting a proposal, the Proposer affirms its acceptance of the terms and conditions of this RFP, including its attachments and exhibits, without exception, deletion or qualification, and without making its offer contingent.**

**<u>Section 3.5.8 Debarment & Suspension Certification</u> will now read as follows:**

**The Respondent certifies <u>by responding to this RFP</u> ~~signing the Proposal Submission Form~~ that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared**

***ineligible, or voluntarily excluded from participation in this transaction by any federal or state department or Respondent.***

Q4: On Page 94, section 8 response – can we include the requirements in our response section 8 to include the responses from section 5 of the outline, it mentions section 4 can be included, but does not mention section 5.

A4: ***Include the responses to Section 5: Infrastructure/Security/Compliance Requirements of the RFP in Section 8 of your proposal following the Statement of Work/Technical Details that were requested in Section 4 of the RFP.***

Q5: To confirm, should the section 5: Infrastructure/Security/Compliance Requirements also be presented under Section 8 – Statement of Work/Technical Details in the final format of the response?

A5: ***See A4 above.***

Q6: From the RFP, do sections 2.6 Technology Platform(s) and 2.7 Data Conversion require a response? If so, would those responses expected to be presented under Section 8 – Statement of Work/Technical Details in the final format of the response?

A6: ***Sections 2.6 Technology Platform(s) and 2.7 Data Conversion require a response. Include responses to 2.6 and 2.7 in Section 8 of your proposal, following the details requested in Sections 4 & 5 of the RFP.***

Q7: Please confirm that Section 4.2.6.2 "Course Development and Scheduling" should be Section 4.2.6.1, Section 4.2.6.3 "Registration/Waitlist/Grading" should be Section 4.2.6.2, and Section 4.2.6.4 "Certificate Creation and Submission" should be 4.2.6.3 (RFP pages 43-44). Please confirm that Section 4.2.6 "Wisconsin State Reporting" should be Section 4.2.7 (RFP page 44).

A7: ***Section 4.2.6.2 "Course Development and Scheduling" should be Section 4.2.6.1.***

***Section 4.2.6.3 "Registration/Waitlist/Grading" should be Section 4.2.6.2.***

***Section 4.2.6.4 "Certificate Creation and Submission" should be 4.2.6.3.***

***Section 4.2.6 "Wisconsin State Reporting" should be Section 4.2.7.***

Q8: What is the budget?

A8: ***The board has committed to provide the resources for the right solution.***

Q9: Have you had documents requesting demo dates already?

A9: *About half of the proposers have submitted dates.*

Q10: Can you share what vendors have submitted demo dates and what order?

A10: *It would not be appropriate or fair to share this information. We will notify the vendors as soon as possible.*

Q11: What tools are you currently using for State reporting requirements?

A11: *CAMS Enterprise has custom screens and tables/fields specifically built for Wisconsin State Reporting. This allows staff to enter the data required by the state for Client, Contract, and Course Reporting (data entry, not file submission for Course). The SQL script was developed in-house to create the submission files specific to the file format required by the state. We also have a custom database for Course and Curriculum Reporting as we chose not to invest in CAMS to customize it to enable us to create the submission file. This is double entry for staff (custom database and CAMS) and not ideal. We expect Course and Curriculum to be integrated into the new ERP system.*

*We are open to the vendor's recommendation if there are third-party tools that would make the required reporting submissions more efficient.*

Q12: Does the foundation and college operate on the same fiscal year? Do you maintain two distinctive chart of accounts, one for the foundation and another for the college?

A12: *The Foundation, Real Estate Foundation, and college all operate on the same fiscal year (July 1 – June 30). Each of the three entities maintains a separate chart of accounts. The college and RE Foundation are in separate companies in Dynamics GP, and the Foundation is a separate company in Raiser's Edge/Financial Edge.*

Q13: Could you extend the deadline for questions an additional week?

A13: *Unfortunately, we are not able to extend the deadline for questions due to our need to stay on our scheduled timelines.*

Q14: In the RFP, yesterday's vendor call was REQUIRED. When Scott did the roll call, Blackbaud, Workday and 9to5 were not on the call. Does this mean that they are precluded from participating in the process?

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A14: ***Proposers must have attended the required briefing call on 9/4/2019 in order to submit a proposal for consideration.***

Q15: Page 11 states 7,500 students which computes to 1354 FTE. IPEDS has SWTC at 2367 FTE. What is the difference between the two numbers?

A15: ***The 7,500 students listed in the RFP are ALL clients served, including Continuing Education, Workforce Development, non-credit, students served by grants, etc.  This is much more than just our program (degree-seeking) students.***

***The 2367 number listed at IPEDS is an <u>enrollment headcount</u>, not FTE.***

Q16: Page 7 states that the purpose of the RFP is to replace all systems including Advancement & Alumni. On page 91 you ask for integrations to Raiser's Edge. Are we to include Advancement/Alumni licensing in our proposal and demos or just the integration to Raiser's Edge?

A16: ***The objective is to propose a solution of ERP and enterprise applications that address the requirements of the RFP.  You will need to determine if the best solution integrates with Raiser's Edge or replaces Raiser's Edge (and Financial Edge/Dynamics GP for Foundation/Real Estate Foundation financials). If you are proposing a replacement for Raiser's Edge, you must include the pricing for the replacement application in Appendix A (cost worksheet).  If you do not propose a replacement for Raiser's Edge, you must identify any cost associated with the integration of Raiser's Edge.***

Q17: If we're to include Advancement/Alumni licensing, how many users does SWTC expect to have in its Advancement office?

A17: ***We expect the range of users to be approximately 10-20.***

Q18: Page 9 states: The College is seeking a shared "next generation" enterprise resource planning (ERP) solution. Can you elaborate on 'shared'?

A18: ***It is in reference to sharing a common data set.  In this case, 'shared' is synonymous with integrated.  This conveys the idea that data is shared across all the systems of the proposed ERP ecosystem, as compared to disparate systems that maintain their own datasets and do not integrate well.  We want to avoid "pockets" of data.***

Q19: Can you please provide your desired timeframe for going live with the ERP project?

A19: *SWTC understands that ERP migration projects typically take 18-24 months when migrating student, financial and HR applications/modules and integrating with any necessary third-party applications.  The final timeline is expected to be negotiated between SWTC and the selected vendor based on vendor implementation methodology, college business cycles, and availability of subject matter experts from both organizations.*

Q20: Regarding CRM: How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?

A20: *Based on functional and technical requirements, we expect to need 5-10 full access users, but defer to your recommendation.  We envision the following departments using CRM:*
- *Advancement/Alumni*
- *Marketing/Recruiting*
- *Student Services*
- *Continuing Ed/Workforce Development*
- *Academic Services*

Q21: (CRM) How many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?

A21: *Based on functional and technical requirements, we expect to need 15-25 limited access users, but defer to your recommendation.*

Q22: (CRM) Does SWTC expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?

A22: *Chat would be a new feature for us, but we are interested in implementing an AI-driven solution, which has become standard across the industry.  We do not envision having the ability to staff a live chat feature during working hours at the time of system go-live.*

Q23: How many student applications does SWTC receive annually?

A23: *For the past few years we have had approximately 1,400+ applications for program (degree-seeking) students.  This excludes non degree-seeking students (Continuing Education, etc.)*

Q24: 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?

A24: ***Based on functional and technical requirements, we expect to need 15-20 full access users, but defer to your recommendation.  We do not currently have functionality to approve and manage budgets, but we desire this feature.  Implementing budget management, we would expect to add another 20-25 users.  We anticipate needing 2 users being able to configure the system, but again defer to your recommendation.***

Q25: (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?

A25: ***The expectation for limited access users for all these functions is through self-service.***