

Enterprise Architecture and Solutions Consultant RFP #51020-09013
Questions & Answers, 5/5/09

- 1. Do the five 2-year schools that are part of the study have the same ERP system? If yes, which one? If not, which ones?**

ANSWER: In some fashion, each college employs a different ERP system, either in terms of software, architecture, or structure:

- *two campuses utilize SunGard's Banner software;*
- *one campus utilizes Sonisweb;*
- *one campus uses Great Plains (a Microsoft product) for finance and human resources and CAMS Enterprise (from Three Rivers System) for their student system; and*
- *one campus uses AS-400 hardware with a homegrown interface.*

- 2. How old are the ERP systems at the five colleges?**

ANSWER: Some systems/software have been implemented as recently as two to three years ago while others have been in use for more than a decade.

- 3. Which are the 5 schools that are part of the study?**

ANSWER:

*Montana State University, Great Falls College of Technology
University of Montana, Helena College of Technology
Dawson Community College
Miles Community College
Flathead Valley Community College*

- 4. Is the distance learning ERP system expected to be part of the overall community college ERP system or a stand-alone system?**

ANSWER: Ideally we would like the distance learning management system integrated with the overall ERP system.

- 5. In the sample contract in appendix B, item number 4 states in part "... plus preapproved actual, reasonable travel expenses..." Does each airfare, hotel, etc. have to be approved prior to booking the reservation, or can there just be an understanding that all flights will be coach, booked two weeks in advance? What are the specific limits to travel expenses under state regulation or the Board of Regents?**

ANSWER: The Board of Regents may pay the actual reasonable costs of air fare, lodging and meals. That means that airline tickets will be reimbursed at coach rates, booked as far in advance as possible to get the best rate. Lodging at local hotels will be reimbursed at a single room rate. Reasonable meal expenses will be reimbursed. (We are not allowed to reimburse alcohol or tips, as per state law). Receipts are required for reimbursement. Only expenses which are not in accordance with the above constraints must be preapproved.

6. Clarifications regarding Contract for Consulting Service:

Per RFP Section 4.3.1, "Acceptance of Contract Terms and Conditions," we respectfully request additions/exceptions to the contract terms as follows:

- Section 7, end: add "Notwithstanding the foregoing, Contractor's maximum liability hereunder shall not exceed \$20,000."

ANSWER: We will delete the requirement for an indemnity provision, please see the more specific general and professional insurance requirements, addressed below.

- Section 8, Required Insurance: For acts that Contractor is solely negligent, and is found to be solely legally liable for, our General & Professional Liability coverages would respond on a primary basis. However, our coverages are not written on a "Primary and Non Contributing Basis". This requirement needs to be amended or removed in its entirety.

ANSWER: We agree to delete the last sentence of Section 8.

- Section 8, Required Insurance: The current language states that our coverage must be in the amount and nature generally held by educational consultants and satisfactory to OCHE. However no specific coverage or limits are indicated. Could you provide the terms of the coverage/limits for our review?

ANSWER: The general liability coverage accepted will be \$750,000 per occurrence /\$1,500,000 in the aggregate or more.

- Section 14, fifth line: insert "first" between "property" and "created".

ANSWER: We can accept this change.

7. The following sections (RFP Section 3.1 and Contract Item 13) seem to be contradictory. Kindly elaborate upon which travel and other expenses will/will not be reimbursable.

RFP Section 3.1, "CRITERIA FOR EVALUATION"

Cost estimates should be exclusive of travel and costs, as OCHE will pay the actual and reasonable costs of travel.

and

Contract for Consulting Services, Item 13, "MEETINGS"

The Contractor is required to meet with OCHE's liaison or designated representatives to resolve technical, contractual or scheduling problems during the term of the contract or to discuss the progress made by Contractor in the performance of the work. Such meetings shall be at no additional cost to OCHE. Meetings will occur as problems arise and will be coordinated by OCHE. The Contractor will be given a minimum of three full working days notice of meeting date, time, and location. Face-to-face meetings are desired. However, at the Contractor's option and expense, a

conference call meeting may be substituted. Consistent failure to participate in problem resolution, consecutive missed or rescheduled meetings, or failure to make a good faith effort to resolve problems, may result in termination of the contract.

ANSWER: OCHE will pay the reasonable and actual travel expenses for travel required by the contract and agreed upon by the parties. Meetings which are not scheduled but which are necessary due to technical issues or progress made (or not made) will not be paid by OCHE, but such meetings can be arranged by telephone for vendors not in the state. Section 13 is meant to address the situation where the vendor is not responsive or progress is not being made. It is invoked rarely.

- 8. In reviewing the following two sections of the RFP, we understand the need to visit five two-year institutions in the state. Kindly specify the cities in which those schools are located and if any of the campus leaders or governing board members (RFP Section 3.1) are co-located in any of the five sites.**

RFP Section 1.3 CONTRACTOR RESPONSIBILITIES / SERVICES REQUESTED

- Analyze and evaluate current administrative information systems' architecture, structure, and capabilities at five 2-year institutions in Montana.

and

RFP Section 3.1 CRITERIA FOR EVALUATION

- Assist in the presentation of results to campus leaders and governing board

ANSWER: There is no requirement that the consultant visit each campus. It is expected that the consultant will make one or two presentations to campus leaders and/or the Board of Regents and it is likely that at least one of the presentations will be located on one of the two-year campus sites.

Below are the locations of the campuses:

Montana State University, Great Falls COT, Located in Great Falls, MT

University of Montana, Helena COT, Located in Helena, MT

Dawson Community College, Located in Glendive, MT

Miles Community College, Located in Miles City, MT

Flathead Community College, Located in Kalispell, MT

- 9. Paragraph 1.3 Contractor Responsibilities/Services Requested (page 3) indicates the contractor will analyze and evaluate current administrative information systems, architecture, structure and capability at five 2-year institutions...Will the selected contractor participate in the evaluation process to determine which five institutions will be examined?**

ANSWER: Yes. There is latitude for the contractor to determine the extent of the evaluation needed and which campuses to include. OCHE anticipates working closely with the contractor to determine the most efficient and effective approach to the evaluation.

- 10. In Paragraph 1.4 Minimum Qualifications (page 4), what is needed to demonstrate documentation of successful experiences in designing successful Enterprise Resource Planning... Would you like to see testimonials or copies of past ERPs?**

ANSWER: Testimonials and/or reference lists will suffice. Copies of past ERPs are not necessary.

11. Under Appendix B Contract for Consulting Services section 13 (page B3) the text states, ‘The contractor is required to meet with OCHE’s liaison or designated representative to resolve technical, contractual or scheduling problems.... Such meetings shall be at no additional cost to OCHE’. This language implies that the contractor cannot bill for his/her time. It also seems to signify that travel costs must be borne by the contractor which is contrary to what is outlined in paragraph 3.1 Costs (page 6). Can you please clarify this issue?

ANSWER: See response to question #7.

12. Which schools in the Montana University System are going to be included in the project?

ANSWER: See answer to Question #3

13. Are there any differences in processes in academic or business units between individual campuses today, that will need to be retained, or is there interest in moving to shared processes across campuses as a result of this effort?

ANSWER: There is a strong interest in moving toward shared processes across campuses.

14. For the schools that participate in this effort, are their specific articulation agreements or formal programs with other colleges and universities that will not be considered as a part of this effort (e.g., can a student begin a single program at one technology college and continue that program through a university, that will not be included in this review, without going through any other admission process)? If the answer to this is yes, where is the student record maintained for this type of situation?

ANSWER: A separate admissions process is required for students transferring from two-year to four-year campuses. There are no joint programs between the 2-year and 4-year campuses that rely on a single admissions process.

15. Of the schools that will participate, which learning management systems/technologies are being used most extensively today?

*ANSWER:
Montana State University, Great Falls COT, Desire2Learn
University of Montana, Helena COT, Blackboard
Dawson Community College, Adobe Connect
Miles Community College, eCollege
Flathead Community College, Desire2Learn*

16. The RFP specifies that responses are to be in PDF format. Should that be an email submission, a CD, or both?

ANSWER: E-mail submissions are preferred, unless the document is extremely large (i.e. +10 MB), then a CD submission is preferred.

17. Will the vendor who is awarded the contract for services for RFP 51020-09013 (Enterprise Architecture and Solutions Consultant) be allowed to bid on any future requests for proposals and be eligible for the selection and an award for either software or consulting services that are a result of recommendations made during this project?

ANSWER: Yes.

18. What technology has already been committed to? Can we leverage some of that?

ANSWER: See response to questions #1 and #15. There are possibilities for leveraging existing technologies. This will be something OCHE is looking for recommendations from the contractor through the various models/options developed.

19. What ERP applications do the colleges included in this evaluation leverage?

ANSWER: See response to question #1.

20. Does Montana University System (or any of the specific colleges) currently have any Learning Management System products licensed?

ANSWER: See response to question #15.

21. Does Montana University System (or any of the specific colleges) leverage any Identity Management Systems or applications?

ANSWER: The two-year campuses in this project all have some form of identity management included within their ERP system, however none of them have implemented a separate, stand alone Identity Management System.

22. Because of the tight budget would it be safe to assume representatives from the individual campuses would be able to participate in joint sessions in a centralized location to expedite the requirements gathering process? If we are required to drive to the different campuses it will delay the timeline and increase the costs.

ANSWER: Whenever possible joint meetings in central locations are encouraged, as well as electronic/phone conferencing.

23. What is the appetite for organizational change across the campuses? Are the receptive to changing existing policies, procedures and process flows?

ANSWER: The Montana University System and the Board of Regents are committed to developing a more coordinated system of two-year education. This effort is couched within a nationally funded grant program, Making Opportunity Affordable, of which Montana is a participating state. The following link will help answer this question and provides information on the System's commitment to organizational change: <http://mus.edu/twoyear/MOA/MOA.asp>.

24. What factors can you list regarding why the enrollment numbers for two year colleges? Has any analysis been done to date?

ANSWER: Two-year education in Montana is the fastest growing sector of higher education in the state. The following link provides some recent trend data:

<http://mus.edu/board/meetings/2009/Mar09/EnrollmentUpdate-Spring2009census.pdf>

- 25. Our team has performed several similar assessments using an onsite and remote model. Because expenses are separate from the \$20,000 threshold you requested is it possible to negotiate for an increase in the \$20,000 since travel/expenses won't be required for some of the time? This would allow us to increase the amount of effort. We typically allocate \$30.00 per hour for expenses when budgeting and assuming 2 of the weeks would be remote that would equate to roughly \$2500-\$4000 in money that would not be spent on travel expenses but could be used for this project budget.**

ANSWER: No, the contract amount is \$20,000. We will negotiate needed travel with the successful contractor.

- 26. Will you make all of the decision makers available in a timely manner? It is imperative that we have access to the pertinent individuals because of the condensed timeline and any decisions or questions are answered as expeditiously as possible.**

ANSWER: Yes.