

May 14, 2024

ADDENDUM NO.: One

TO ALL OFFERORS

REFERENCE: Request for Proposal No: RFP# FDC-1211
Dated: April 30, 2024
Commodity: Online Training Services Provider
RFP Closing On: May 21, 2024 @ 2:00 p.m.

Please note the clarifications and/or changes made on this proposal program:

The following questions are answered below:

1. Does my company need to be registered to do business in Virginia?

Answer: Yes, businesses formed in another state or jurisdiction must register with the SCC to transact business in Virginia. More info: <https://scc.virginia.gov/pages/new-business-resources> Furthermore, your company should be registered with eVA as well. More info: <https://eva.virginia.gov/get-help-customer-care.html>

2. Are SWaM participation requirements in the RFP a must-have, meaning we need a certain percentage of SWaM participation, or is it just an option to gain extra points? And if we don't propose any SWaM-certified subcontractors, would it disqualify our proposal?

Answer: It is a way of earning more points during the evaluation process. If your company is not a registered SWaM supplier, nor proposing any SWaM-certified sub-contracting you can still submit a proposal. Indicate response in Attachment B *SWaM Utilization Plan*.

3. Given that the scope of this procurement includes the evaluation and selection of the ERP implementation partner, can JMU confirm that the vendor (including its subcontractors /affiliates/ subsidiaries) who wins this contract will not be allowed to participate in the procurement to be the ERP implementation partner?

Answer: Correct. The consultant cannot also be allowed to participate as the ERP implementation partner. That would be a conflict of interest. Please review IV *Statement of Needs* for specifics to this this search for an advisory consultant.

4. Do you have an anticipated release date for the procurement of the ERP system itself?

Answer: JMU will engage offerors of known higher education focused ERP systems as soon as next Fall. Schedule TBD.

5. Do you have a target completion date?

Answer: JMU does not have a target completion estimate for this RFP. See response to #7 below for ERP implementation answer.

6. What was the impetus for JMU to initiate the assessment and selection of a new ERP system?

Answer: JMU is executing a multi-year, multi-project digital transformation initiative to modernize key technology platforms, enhance constituent experiences, drive efficiencies, among other objectives. Replacement of JMU's ERP solution is a part of this initiative.

7. Does JMU have a target implementation timeline for the SaaS ERP once selected?

Answer: JMU anticipates implementing a HR/HCM and Finance platforms during fiscal years '26 and '27 with a student solution implemented afterwards.

8. What office or division is sponsoring this project?

Answer: JMU Information Technology. All communication shall be through Procurement for RFP FDC-1211.

9. Has JMU named an executive sponsor for this project?

Answer: No information to share. All communication shall be through Procurement for RFP FDC-1211.

10. Question: Is the steering committee that has been assembled for Reengineering Madison the same steering committee that will oversee the ERP Advisory Services project?

Answer: Reengineering Madison is larger than just the ERP portion of the project and includes representation from all impacted offices on campus.

11. Has JMU identified internal resources who will support this project? If so, what are their roles and level of effort?

Answer: TBD, JMU leaders will identify key team members to participate in necessary steps for assessment and evaluation.

12. Please clarify the meaning of the word “characteristics” of the following question: “Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.”

Answer: By characteristics, we are interested in understanding area/s of expertise for individual consultant/s, as well as role and responsibilities of the individual/s for this engagement.

13. Please confirm that performing the scope of work outlined in this RFP for ERP Advisory Services will not preclude the contracted vendor from supporting related projects or implementations in the future?

Answer: Contracted vendor to this RFP will be precluded from being considered as an ERP provider or ERP implementation service provider – that would be a conflict of interest. This RFP is for an advisory consultant to JMU.

14. Will JMU accept electronic submissions in lieu of a hard copy submission?

Answer: No. JMU is not set up to receive electronic proposal submissions at this time.

15. Will JMU accept electronic signatures for required signatures for submission?

Answer: Yes.

16. In Section V, p. 9 of the RFP, Item c. includes a specification that “Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page.”
Can JMU clarify how/whether respondents should address this requirement? While many items in the RFP do contain an identifier (e.g., Section V, item C) many paragraphs and items are not numbered.

Answer: The RFP Word document is meant to be used as an inline template for offeror responses. If offerors have questions in other sections, note the question/objection/clarification request clearly with the use of a separate visual effect (i.e. font color or highlight). See Section V for Proposal Preparation and Submission instructions.

17. Can JMU please clarify instructions on how proposals are to be organized? There are multiple areas which provide instructions that appear to be contradictory.

Answer: See question #16 above.

18. Section IV, p. 7, item 2.3 states “Describe as relevant project approach including deliverables (audit/assessment, recommendations, assistance with ERP vendor selection, assistance in negotiations, assistance in review of terms and business issues).

Can JMU clarify what it means by audit/assessment in this context? We assume this refers to auditing the project to meet major milestones and goals / ensure project performance, is this correct, or does JMU want other services such as independent verification & validation included in this proposal?

Answer: JMU is interested in understanding the offerors approach for assessment. In this context “audit/assessment” refers to how the offeror will go about understanding and evaluating the current state along with how this understanding may relate to/impact major goals, milestones and outcomes of the implementation itself. JMU does not desire other services such as independent verification & validation included with this proposal.

19. Section IV, p. 7, item 5: does JMU have a preference for how much of the project work is conducted onsite vs. remote? Is JMU open to entirely remote proposals?

Answer: JMU will accept remote and onsite pricing and proposals, and retains the right to award to best suited offeror.

20. Can JMU clarify the intended guidance of the statement on p. 5 “The University is aware of other cooperative contracts awarded by higher education institutions in the Commonwealth. Firms currently on a cooperative contract with these institutions are not required to respond to this solicitation. The University reserves the right to request quotes from firms on other cooperative contracts, when it is deemed in the best interest of the University”?

Is JMU primarily considering VASCUPP cooperative contracts, or is it comfortable using other cooperative procurement mechanisms it has access to, such as the Edge collaborative?

Answer: If your firm already has a cooperative contract awarded by a higher education institution in the Commonwealth (e.g. VASCUPP, VHEPC) JMU can access your firm’s services without the need for your firm to respond to this RFP. To ensure JMU is aware of your interest in this project, we would advise that offerors submit a response and note that they already have a cooperative available in Section X: *Pricing Schedule*. JMU would need to evaluate other entity cooperative vehicles to make sure it met JMU’s and the Commonwealth’s guidelines for cooperative contracts.

21. On p. 6, Section IV, item 1.b. JMU says “Describe actual return on investments for colleges/universities that have retained services from your organization for an ERP implementation project” – does JMU mean an ERP selection project, or is JMU focused on implementation support, which is out of scope for this RFP response as we understand it?

Answer: Yes, we mean ROI for ERP advisory input in the pursuit of a selection/deployment. How will the offeror enhance the university’s selection and deployment (for example, knowledge of industry pricing, best practices, ERP scope needs, and platform differentiators).

22. On p. 6, Section IV, item 1.e. JMU says “Describe any change management or education services that you may offer as part of this engagement, include pricing in Section X. Pricing Schedule.”

Can JMU clarify whether the institution wants service descriptions and methodology for change management and education in the pricing section, or whether it is appropriate for respondents to include these services with other steps and restrict Section X. to sharing pricing information for these additional offerings?

Answer: Descriptions of these services may be included with other sections and restrict Section X to pricing. With this RFP, JMU is interested in understanding change management and/or education services that may be offered as part of or in parallel with assessment, evaluation, and negotiation activities.

23. On p. 7, Section IV, item 2.d. JMU says “Describe evaluation procedures to assist the university in examining potential areas of growth and efficiency as related to student and staff record management.” Can JMU clarify what it means by “areas of growth” – does this mean opportunities for doing more / better leveraging data, or something else?

Answer: “Areas of growth” examples may include better leveraging of data for decision making, automation of business processes, or new business processes or insights that have not been available with current technology.

24. Attachment A on p. 24 says “Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing”. Can JMU clarify whether past, similar higher education engagements are acceptable to include as references here?

Answer: Past similar higher education engagements are acceptable to reference.

25. On p. 24, Section IV, item 3.h., JMU says “Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.” Can JMU clarify this request? Is the university asking us to describe our planned staffing for this engagement, or describe how we would help JMU create a staffing plan for the ERP implementation?

Answer: JMU is asking how you propose to staff this engagement.

26. Does JMU have an organization change/communication team / resource(s) to support the initial awareness and stakeholder engagement process for this initiative?

Answer: Yes, JMU has leaders and resources that will support initial awareness and engage the appropriate stakeholders for this initiative.

27. Are there any other software/application/tools that need to be included in future state (i.e., for integrations) that are currently being used but will not be replaced (i.e., Salesforce, Boomi)?

Answer: See Section II *Background*. There is software on campus that integrates with the current ERP and may or may not be made redundant by a future ERP. A successful contractor will aid in such decisions.

28. Please confirm if JMU is looking to select a single vendor for all 3 areas (financial, HR, student) or are you considering multiple vendor solutions?

Answer: Ideally JMU seeks a single solution ERP for HR, financial, and student.

29. How many JMU resources will be part of the evaluation project (and if you can provide overall number of people by organization too)?

Answer: Not answerable at this time.

30. Can you provide which scope capability areas are to be included in the project scope. For example, within Human Resources are you interested in: Core HR, Benefits, Payroll, Learning, Performance Management, Onboarding, Talent acquisition/Recruiting, etc. Also, is Budgeting and Planning / FP&A an area that JMU would like to be part of the evaluation scope?

Answer: This RFP is for an ERP advisory consultant, not an ERP or implementation services provider. Successful offeror may be asked to provide advisory services on all, not limited to, of the referenced areas.

31. How many (and which) business processes are being considered for each area (Finance, HR, Student Systems)? What modules/capabilities are being used today (in your current system)?

Answer: This will be negotiated with top offerors.

32. Are there any pain points within the current business process that can be perceived as particularly challenging?

Answer: None to provide at this time. See answer to #6.

33. Is JMU open to the same advisory services partner to be part of the software implementation program? If so, please share any restrictions (i.e., software implementation vs PMO, process and change management)

Answer: See answer to #3 above.

34. Does JMU want the partner to help create or review a business case to support the procurement and implementation of a new Enterprise Solution for Finance, HR and Student?

Answer: JMU leadership does plan to select and implement a new ERP solution, so a business case is not the primary objective.

35. Are bidders for the ERP Advisory Services proposal restricted from bidding on the implementation of the selected software?

Answer: Yes. This advisory RFP is not for the purchase of an ERP or related installation.

36. Are offshore resources permitted to be used for any parts of the project?

Answer: You can include them in your pricing Section X. Pricing Schedule.

37. It appears that University is open to both On-Site and Off-Site project delivery methods. Does the University have a preference as to the percentage of the project time expected to be spent on-site vs off-site?

Answer: See answer #19 above.

38. Describe plans the University may have for establishing a project management office, steering committee or other structure for project governance.

Answer: JMU has an established Steering Committee and will have project management resources assigned for this effort.

39. With RFP # FDC-1211, does the University seek to establish a contract vehicle or master services agreement for ERP Advisory Services, or does the University seek to contract with one specific vendor to provide the ERP Advisory Services outlined in Section IV Statement of Needs?

Answer: See question #3 above.

40. If the University seeks to establish a contract vehicle or master services agreement, how will vendors on other VASCUPP cooperative contracts be notified of opportunities to bid?

Answer: See question #20 above.

41. Our firm is on multiple existing VASCUPP cooperative contracts; would our firm be eligible to submit a proposal in response to RFP # FDC-1211?

Answer: See question #20 above.

42. Will the University be assembling a committee to conduct evaluations of proposals? If so, what roles or departments will be represented on the committee? We understand that the members of the evaluation committee will not be public knowledge; however, we would ask the University to disclose the titles/roles of those who will serve on the evaluation committee (e.g., IT Specialist, Systems Administrator) so bidders may have a clearer understanding of this project evaluation team.

Answer: The evaluation committee is comprised of appropriate stakeholders from the Reengineering Madison project and they are familiar with the services being requested in this RFP.

43. Does the University have a preference for a remote, on-site, or hybrid work arrangement for the services outlined in Section IV Statement of Needs? If yes, please provide details. If a hybrid approach is preferred, approximately what percentage of the work does the University expect to be conducted on-site?

Answer: See question #19 above.

44. Does the University have a minimum participation requirement or expectation for SBSD utilization? If yes, please provide details. For example, if the University requires or expects a certain percentage of the contract be designated for SBSD utilization, please provide details.

Answer: No. However, JMU strives to work with SBSB-registered SWaM vendors whenever possible. Additionally, offerors are encouraged to utilize SWaM sub-contracts when practicable. See also question #2 above.

45. Can you please provide additional details regarding the Reengineering Madison project schedule (e.g., implementation of new CRM and other software) and the level of stakeholder awareness?

Answer: Information about the Reengineering Madison project can be found here - <https://www.jmu.edu/computing/projects/reengineering-madison/index.shtml>

46. Please confirm that major carriers (e.g., FedEx, UPS) can deliver to the address provided:
Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Answer: Yes, major carriers routinely deliver proposals to the above address. Please ensure that the RFP number is clearly indicated on the outermost shipping packaging.

47. Will the selected vendor for this project be precluded from bidding on the system implementation (SI) work?

Answer: Yes. See questions #3 above.

48. The schedule on the Reengineering Madison site provides that the final go-live for Identity Management is FY25, HCM/Finance is FY27, and Student Admin is FY29, is JMU's current prioritization and timeline still consistent with this schedule (noting that the schedule was last updated in May 2023)?

Answer: Yes. The Reengineering Madison website is updated as needed with regards to schedule/timeline.

49. Does JMU have a template for the cost estimates and resource details required for the price proposal that will be derived from the rates from the pricing schedule in Section X?

Answer: No. Please provide your firm's hourly rates for the requested consulting positions/equivalent title at your organization.

50. Although the RFP pricing template requests on-site and off-site rates, the RFP does not explicitly state JMU's work preferences – can this work be primarily performed remotely with resources to be available on-site on an as-needed basis?

Answer: See question #19 above.

51. Will JMU accept a fixed-fee, all-inclusive price?

Answer: JMU is seeking hourly rate pricing because the actual amount of work hours needed is unknown. You are welcome to submit a "fixed-fee, all-inclusive" price for JMU to consider.

52. Should the cost estimates and pricing be submitted separately from the technical proposal?

Answer: No. Please submit cost estimates within your proposal.

Signify receipt of this addendum by initialing "*Addendum #1*" on the signature page of your proposal.

Sincerely,
Doug Chester
Buyer Senior
Phone: 540-568-4272