



August 2024

Request for Proposal: Enterprise Resource Planning (ERP) System

1	CONTACT	3
2	ORGANIZATIONAL HISTORY	3
2.1	GENERAL INFORMATION	3
2.2	MISSION STATEMENTS	3
3	INTRODUCTION	4
4	STATEMENT OF NEEDS	4
5	SCOPE OF WORK	6
6	QUALIFICATIONS, REFERENCES, AND PRICING	6
6.1	QUALIFICATIONS AND REFERENCES	6
6.2	BIDDER REFERENCES	7
6.3	PRICING	7
6.3.1	Terms	7
6.3.2	Taxes/Fees	8
6.3.3	Modules	8
7	RFP INSTRUCTIONS, REQUIREMENTS, AND INFORMATION	8
7.1	QUESTIONS ABOUT THIS RFP	8
7.2	DEADLINE AND DELIVERY	8
7.3	PROPOSAL SUBMISSION REQUIREMENTS	9
7.3.1	<i>Cover Letter and Intent to Bid</i>	9
7.3.2	<i>Technical Response</i>	9
7.3.3	<i>Implementation Plan</i>	9
7.3.4	<i>Training and Support</i>	9
7.3.5	<i>Pricing Structure</i>	9
7.3.6	<i>References</i>	9
7.3.7	<i>Appendices</i>	10
7.3.8	<i>Formatting Specifications</i>	10
7.4	SELECTION PROCESS	10
7.4.1	Method of Award	10
7.4.2		10

Request for Proposal: Enterprise Resource Planning (ERP) System

APPENDIX 6: IT REQUIREMENTS.....	35
APPENDIX 7: STUDENT SUCCESS REQUIREMENTS.....	38 S

Request for Proposal: Enterprise Resource Planning (ERP) System

For questions regarding this RFP, please contact:

Mark Tuck
Executive Vice President
Ferrilli, LLC
4 Kings Highway East
Haddonfield, NJ 08008
Telephone: 856-229-0035
Email address: VSCSRFP@ferrilli.com

The Vermont State Colleges System (VSCS) is comprised of two member institutions – Community College of Vermont (CCV) and Vermont State University (VTSU). The system educates over ten thousand Vermonters and non-Vermonters each year, employs over three thousand Vermonters, and in Spring 2024, graduated over fifteen hundred Vermonters and out-of-state students into the workforce with certificates

Request for Proposal: Enterprise Resource Planning (ERP) System

integrated access to academics, registration, financial aid, and student services. The system must simplify administrative interactions and enhance students' engagement with their education, leading to improved satisfaction and success.

Request for Proposal: Enterprise Resource Planning (ERP) System

Bidder Profile and Qualifications

- Name, mailing address, email address, and telephone numbers of company.
- Number of years in business.
- Number of employees in Vermont and nationally.
- Number of public colleges and universities (with a breakdown of community colleges and universities) in which the product is installed and maintained by the bidder.
- Name and number of higher education systems
- Please provide a complete HECVAT Light Version (<https://www.ren-isac.net/public-resources/hecvat.html>).

You must demonstrate experience and capability in the implementation and maintenance of the proposed solution by providing evidence of successfully completing projects of similar size and scope. References should be comparable to the Vermont State Colleges System and include one community college, one regional public institution, and one system.

Please provide at least three customer references, with the following information:

- Customer name and location
- Contact person(s): name, title, and telephone number
- Your project manager for the engagement
- Implementation date
- Number of years you have maintained the system

Please note that if any partners participated in any aspect of the implementation, you are required to disclose their involvement and provide three references for each partner as outlined above.

By submitting your proposal, you understand and agree that the VSCS may make any investigations or reference checks with customers beyond those provided as it deems necessary to determine your

Colleges System and include one community college, one regional public institution, and one system.

7.3.7 Appendices

Additional Information: Any additional supporting materials, technical documentation, or product brochures that could support the proposal.

7.3.8 Formatting Specifications

Font and Size: Arial, Calibri, or Times New Roman, 12 font

Line Spacing: 1.15

Margins: At least 1 inch

File Format: Searchable PDF

7.4.1 Method of Award

VSCS will base the evaluation of each proposal to this RFP on its demonstrated competence, compliance, format, cost, and enterprise applicability. This includes, but is not limited to, product availability, quality, prices, service availability, timing, and delivery. The purpose of this RFP is to identify those vendors having the interest, capability, and financial strength to supply the VSCS with an ERP solution. If the VSCS does not identify a suitable bidder within the RFP process, the VSCS is not obligated to award the project to any bidder.

The VSCS, in its best interests, reserves the option to accept or reject any or all proposals, to accept, combine, or reject any item or combination of items therein, to waive any irregularities or informalities in any proposal or items therein, and/or to negotiate with particular bidders

7.4.3 Bid Process Dates

Date	Milestone
8/30/24	RFP Issue Date
9/6/24	Acknowledgment of Receipt (Appendix A) Due
9/11/24	Questions Due

Request for Proposal: Enterprise Resource Planning (ERP) System

By submitting a proposal, and in exchange for VSCS's consideration of same, you agree on behalf of yourself, your shareholders, and your officers to be bound by the indemnification provisions of this subsection.

VSCS reserves the right, at its discretion, to pursue actions that include but are not limited to the following:

- Request additional information
- Request clarification of any sections or questions in the bidder's response to this RFP
- Reject, for any reason, any or all of the proposals submitted to VSCS
- Issue subsequent RFP or RFP invitations to bid as a result of changes and/or refinements to the proposed project
- Use pricing from State of Vermont-secured procurement methods if available.

This RFP does not oblige the VSCS to accept any proposal, negotiate with any bidder, award a contract, or proceed with the project as it is outlined in this RFP.

The bidder may not assign or transfer its rights or obligations under this RFP without the prior written consent of VSCS, which consent shall not be unreasonably withheld. Any assignment of the RFP agreement by the bidder without the prior written consent of VSCS shall void the RFP response from the bidder.

The selected bidder will be required to provide a copy of the RFP to the State of Vermont, Department of Information Systems, 100 State Street, Montpelier, VT 05602, by email to erp@vt.gov or by mail to the same address. The RFP is available for review at the same address. The RFP is available for review at the same address. The RFP is available for review at the same address.

Request for Proposal: Enterprise Resource Planning (ERP) System

- Cyber Liability: \$1,000,000 each event for Breach Response

If selected as the successful bidder, you agree to name the VSCS as additional insured on your liability policies and shall provide a 30-day notice of cancellation or non-renewal of coverage to the VSCS. The VSCS does not need to be named as an additional insured on the workers compensation policy.

If selected as the successful bidder, you agree to submit a copy of the Certificate of Insurance verifying the above coverage levels to the VSCS twenty (20) days prior to selling or distributing products and services at VSCS or otherwise performing under the contract. Any liability coverage on a "claims made" basis shall be designated as such on the certificate.

Failure of the bidder to take out and/or maintain any required insurance shall not relieve the bidder from any liability under the contract, nor shall the insurance requirements be construed to conflict with or otherwise limit the obligation of the bidder concerning indemnification. The bidder's policies shall be considered primary insurance and exclusive of any insurance carried by VSCS.

Any agreement reached as a result of this RFP shall be governed and interpreted in accordance with the laws of the State of Vermont without reference to its choice of law provisions.

Request for Proposal: Enterprise Resource Planning (ERP) System

The undersigned (“You”) agrees to all provisions required in the ERP RFP dated August 30, 2024, and all applicable addenda, except those listed below. Any exemptions listed may affect the viability of your proposal.

In addition, the undersigned (“You”) agrees to provide all software, services, and personnel associated with these services and terms offered as described in the ERP RFP dated August 30, 2024, and all applicable addenda.

Exceptions:

Section Reference	Reason for Exception

Company Name

Signature of Authorized Representative

Print Name of Authorized Representative

Print Title of Authorized Representative

Request for Proposal: Enterprise Resource Planning (ERP) System

Please provide the requested information below as acknowledgment that you have received the VSCS ERP RFP. It is strongly recommended that interested proposers complete this acknowledgment and return it to Mark Tuck, Executive Vice President, Ferrilli at VSCSRFS*(i)rr.4 (ec.2 (p)l.2 (e)0.8 (o)-15 (F)-2.c(rec)-5*

Vendor/Software	Use
Ad Astra	Academic and Events Scheduling
ByWater Solutions	Library catalog
CampusM (Ex Libris)	Portal
Canvas (Instructure)	Learning management system
ClearCost	Net Price Calculator for student financial aid
Duo Security	Multifactor authentication
Entrinsik	Institutional reporting (Informer) and non-credit course registration (Enrole)
eRezLife Software	Residence life software
Explorance	Course evaluation software (Blue) (note: moving to Watermark Course Evaluations by January 2025)

CCV Custom Web Applications

The community college has developed and maintained around 60 unique custom web applications that support institutional processes not fully supported by current ERP. Those processes include personnel change processing, faculty evaluations, course scheduling, program planning, curriculum management, course evaluations, student evaluations, a public course schedule, faculty management, financial aid advances for textbooks, and various request form/workflow processes.

2. **Yearly Listings:** Allow viewing of multiple catalog years.

Request for Proposal: Enterprise Resource Planning (ERP) System

2. **Degree Posting:** Post credentials without adversely affecting existing transcripts or degree audit
3. **Student Process and Communication:** Improve processes and communication regarding graduation applications, certificate completions, and "graduation" language.

FERPA Forms and Policy Compliance

1. **Online FERPA Forms:** Replace PDF authorization forms with online forms for release to third parties.
2. **Staff Awareness:** Ensure staff are aware of where to find release authorizations and understand FERPA policy compliance.

Academic Calendar

1. **Calendar Management:** Create a calendar for the institution that supports two separately accredited institutions.
2. **Policy Compliance:** Ensure the calendar

The ERP should meet various requirements, such as: support general ledger accounting and reporting per NACUBO FARM for GASB, including fund accounting and USDOE requirements; enable efficient financial operations management like multi-state payroll, tax management, procurement, accounts payable and receivable, inventory, and grants management; facilitate banking transactions with automated account reconciliation and real-time cash reviews, integrating with third-party providers; automate billing, including payment plans and invoicing for sponsored courses; and include integrated budgeting and forecasting capabilities.

General Ledger

1. **Hierarchy Management:** Support institution-specific general ledger hierarchies for multiple institutions and fiscal entities.
2. **Time Period Reporting:** Support the creation of financial reports with custom ranges within a single fiscal year and across fiscal years as required for financial, governmental, and grant reporting.

Cash and Asset Management

1. **Cash and Asset Holding Visibility:** Provide visibility of cash and asset holdings showing earmarks for specific institutions and entities based on role-based access controls.
2. **Comprehensive Management:** Provide for cash flow forecasting, real-time bank integration, multi-currency management, and treasury management.

Accounts Receivable

1. **Invoicing Automation:** Automate non-credit bearing revenue transactions including such things as invoicing for conferences, events, and other academic and non-academic services across all institutions and fiscal entities and state, federal, and private granting authorities.
2. **Receivables Visibility:** Provide visibility into receivables balances and aging within the system throughout the entire revenue lifecycle including credit-bearing and non-credit-bearing academic activity, conferences, events, services, grants, and other entities.
3. **Document Retention:** Link transactions to backup documentation for traceability to original invoices, contracts, and supporting documents.

Student Accounts

1. **Acceptance of Collections Charges:** At the time of registration, force students to accept terms regarding the collection of unpaid accounts and the application of a collections fee.
2. **Billing Communications to Students:** Automate (with configuration) the communications lifecycle regarding student billing from registration to billing notification, payment, de-registration (if applicable by the institution), and in-service and post-attendance collections cycles.
3. **Title IV Refund Calculation:** Simplify and automate the preliminary calculation of return to Title IV refund calculations.

4. **Account Status Identification:** Provide advisors a unified view of a student's account status for "at a glance" understanding of a student's record, including information regarding

reporting should integrate with the HRIS module, and payroll functionalities to allow for cost-allocation of time management.

7. **Self-Service Functionality:** Enable self-service payroll adjustments by employees for items such as tax withholding, direct deposit, voluntary retirement contributions, address changes, etc.
8. **Retroactive Payments:** Automate the calculation and application of retroactive payments for backdated salary increases or payroll errors.
9. **Cost Allocation for Time & Effort (T&E):** Implement cost allocation options for T&E reporting.
10. **Position Budgeting:** Enable position-based budgeting and expense management.

2. **Accurate Data Manipulation:** Provide data manipulation capabilities configurable by institution

13. **Automate Time Off Accruals:** automate accruals, maximums, holiday rules, and roll-over amounts based on eligibility criteria. Warnings and rules to avoid negative balances.
14. **Benefit Eligible Earnings**

6. **System Flexibility:** Improve system flexibility to handle exceptions and side-letter agreements with bargaining units.
7. **Out-of-State Taxation:** 5 (o)1.17(o)gdatice1ETEMC /LBody (J)J/T898 1.002rn

Request for Proposal: Enterprise Resource Planning (ERP) System

3. **Position Requisitions:** Streamline processes for position requisitions and vacancy postings.
4. **Application Management:** Enhance recruitment processes, including application management.
5. **Recruitment Board Posting Automation:** Post positions to desired recruitment boards.
6. **Easy Application:** Allow potential employees to easily apply with a resume that autofill.

Diversity, Equity, Inclusion (DEI)

1. **Preferred Name:** Allow for preferred/lived name to become primary name on systems.
2. **Gender Equity:** Support best practices associated with gender identity.
3. **Reporting Compliance:** Compliance with voluntary ID forms, OFCCP, EEO & IPEDs, etc. reporting.

Request for Proposal: Enterprise Resource Planning (ERP) System

VSCS desires an effective solution for managing patches and upgrades that ensures operations remain uninterrupted. The solution should include document management functionalities that align with records retention policies. It should facilitate low or no-code integrations and enable ad-hoc form approval workflows utilizing ERP data. Implement role-based security that adapts to changes in employee status, including transitions within the organization. The reporting features must support both routine operational reports and data warehousing capabilities for strategic longitudinal analysis. Additionally, the solution must integrate with Microsoft Office 365 to bolster enterprise productivity tools.

Third-Party Integrations

1. **Standard Approach:** Establish a standard approach for third-party integrations.
2. **Integration Issues:** Enable seamless integration of Hrd

(o) [(o) 6-du] qez

3. **Content Management:** Improve content (page) management for better usability.

Security

1. **Robust Security Protocols:** Implement robust security protocols across all systems, ensuring

Student Success requires a solution that will support the lifecycle of Student Success operations, including onboarding, advising, and academic support. Enable advisor caseload tracking and case management, including a roadmap to individual degree completion and faculty or staff alerts and follow-up communications. Maintain confidentiality of sensitive data, like notes and disability information, while allowing for comprehensive reporting and complex data needs based on role-based access control parameters.

Student Advising

1. Case Management

mmmmisinTw 15 (nTw 1 Tm[1] w 15 D(m)-1..98 19uf.8 (ma)-1 (t)2 (e6.5 (n).9 (-)-5.1 (2 (i)-

Registration and Advising

1. **Role-Based Access:** Improve role-based access to systems.
2. **Informer Reports:** Facilitate easier configuration and building of reports to drive activity and processes.
3. **International Student Support:** Enhance reporting and system support for international students, ensuring SEVIS compliance.
4. **Comprehensive Advising Services:** Support all aspects of student advising, including staff assignment, online orientation, registration, degree planning, and needs-based services.

Academic Support

1. **Self-Registration:** Enable students to register themselves for academic support services.
2. **Program Maps Implementation:** Implement program maps within the system.
3. **Flexible Term Structures:** Accommodate different course lengths and term structures.
4. **Program Evaluation:** Improve program evaluation processes.
5. **Automated Degree Planning:** Automate second-degree planning processes.
6. **Probation Visuals and Steps:** Provide visual aids and clear steps for students on probation.
7. **TRIO Eligibility Reporting and Recruitment:** Improve reporting of student factors related to TRIO eligibility, especially for low-income, first-generation, and students with disabilities.
8. **Document Sharing:** Facilitate sharing of Accommodation Letters between faculty, staff, and students.

Student Access Database Administration

1. **Data Integration:** Improve integration with all data sources for automatic transfer of documents and information to the mandatory Student Access Databases that support multiple TRIO programs.
2. **Manual Data Entry Reduction:** Reduce the need for manual data entry into Student Access.

Disability Services

1. **Confidentiality and Info Flow:** Improve systems to manage confidentiality while allowing easy flow of information

Student Life – Student Activities and Government

1. **Event Promotion:** Develop a better way to promote programming and events using an online calendar.
2. **Student Government Engagement:** Improve engagement opportunities for students in government and participation online.
3. **Cross-Campus Communication:** Strengthen cross-campus communication and coordination.
4. **Integration with Third-Party Student-Facing Systems:** Integrate with systems that provide emergency notifications, parking permits, student and employee IDs, building access, etc.

Workforce development units in the Vermont State Colleges System require solutions that will support the diverse needs of students, faculty, and administrators. Workforce programs encompass for-credit and non-credit courses, certificates, and other credentials. Functionality should focus on improving the integration of systems, streamlining processes, and accommodating the unique challenges presented by workforce education. The solution will provide a more seamless and efficient experience, enhancing the overall management of student lifecycles, registration, payment processing, funding, instructor management, and curriculum delivery.

Student Lifecycle

1. **CRM Integration:** Integrate with multiple instances of Slate CRM to effectively manage relationships with students, employers, and government entities.
2. **Targeted Communications:** Differentiate system-generated communications to workforce students, ensuring communications are appropriate for their student type(s) (e.g., financial aid reminders are not sent to those with balances due to employer-sponsored courses).
3. **Students with Multiple Programs:** Allow institutions to configure the system to support students who are participating in both degree and workforce programs across multiple institutions.

Registration and Payment

1. **Self-**

