



**THE UNIVERSITY
OF ARIZONA®**

Procurement and Contracting Services

**Request for Proposals
For**

**Enterprise Resource Planning Readiness
Assessment and Project Management Services**

**ADDENDUM # 1
RFP L202001**

**Please mark all proposal submission
Envelopes with the following information**

Sealed RFP # L202001

**NEW submission date: August 26, 2019
no later than 2:00pm MST**

University of Arizona RFP #L202001

Revised Schedule of Events:

08-26-2019	RFP is Due August 26, 2019, no later than 2:00 PM, MST
08-29-2019	Initial Evaluation of vendors; narrow it down to 2-3
Aug/Sept.	Vendor Presentations, (if necessary); Dates are TBD
09-06-2019	Complete Final Evaluations
09-11-2019	Award Notification
09-30-2019	Begin Assessment
11-22-2019	Final Presentation on findings

Request for Clarification

- Q1. Would the consultant company selected for the ERP Readiness Assessment and Project Management services be precluded from bidding on any RFP related to, or, serving as implementation partner/consultant on any actual implementation project that the University may undertake?**

This would not preclude any vendor from future bid opportunities. The University welcomes the opportunity to review competitive bids from all vendors.

- Q2. What is the university's definition of ERP Financials, what line(s) of businesses and/or processes are within scope?**

The University of Arizona's financial system. More information can be located at: <https://it.arizona.edu/service/uaccess-financials>

- Q3. Is any specific higher education or campus/student functionality in scope?**

Not at this time.

- Q4. What system or systems are currently being used to perform the ERP functions that are in scope?**

Kuali Financials

- Q5. Has ERP software been selected?**

No.

- Q6. If ERP software has not been selected, would the consulting firm awarded the readiness assessment cover the services under Project Deliverable #1?**

Yes – we would be looking for the consulting firm to complete the readiness assessment to help UA determine if our business processes are “ready enough” to begin the next phase which would be the software selection and the vendor implementation selection. We would not be looking for the readiness assessment to propose a software solution but it should help us determine the needs of UA.

Q7. Does the University plan to put the upcoming selection of an ERP vendor/implementer into a formal RFP process after the assessment (Project Deliverable #1)?

Yes

Q8. Does the University plan on owning the technical / functional implementation of the ERP solution? Will this be their full time job? Does the University want subject matter and/or software expertise consultants to be involved in phase two along with the Project Manager (for design / build / test / deploy activities for example)?

UA will be using a blend of resources for the implementation of the ERP solution. We will be bringing in an implementation partner with subject matter expertise. We will utilize the Project Manager and UA will have their own staff dedicated to this process.

Q9. Can you describe the University senior staff/resources who will be available to assist with the assessment (if at all) and resources who will be available for the implementation as mentioned in the RFP document? How many resources? What roles and skill sets? (Please provide an org chart if available)

UA will determine the resources needed for an implementation once we get to that phase. The expectation is that senior staff will be available as part of the readiness assessment for “interviewing” to determine the readiness of the university.

Q10. Can vendors respond to the RFP with separate proposals for Deliverable #1 and Deliverable #2? Will UA accept bids that only respond to one of the two Deliverables?

Yes, vendors may respond with two distinct responses to each Deliverable. Yes, the UA will review and entertain proposals for only one of the two Deliverables.

Q11. What is the budget allocated for the ERP Financials software?

A rough budget number has been provided to the Senior Leadership Team but we are not at liberty to share that number at this time.

Q12. What is the budget allocated for Project Deliverable #1?

The budget will be determined based on the responses to the RFP.

Q13. What is the budget allocated for Project Deliverable #2?

The budget will be determined based on the responses to the RFP.

Q14. Does the University have any criteria already in mind for the ERP software, such as on premise, cloud, hybrid, enterprise, tailored for small business, higher education or completely open to recommendations obtained during the assessment?

A solution for an ERP solution is out of scope for this RFP. Nothing in the RFP requests that the University is seeking recommendations for a solution.

Q15. Are there any currently known pain points with Financial reporting? Other application/functionality pain points?

There are numerous pain points, too many to list. However this will be part of the discovery within the Readiness Assessment.

Q16. Are there any competing projects and/or priorities that may impact this program?

UA has a lot of efforts going on at this time, however we plan to dedicate the appropriate resources to this to be successful.

Q17. Do you have a timeline in mind for the implementation? Is there a required go live date based on the seasonality of your business, upcoming acquisition, expiration of existing system software licenses etc.? Please explain your business calendar and timeline drivers.

Timeline and Go-live is TBD. It would be nice to go live at the beginning of a new FY (July 1st). We understand this is a multi-year effort.

Q18. As stated in section 3.3 of this RFP, should the ERP Readiness Assessment (Project Deliverable 1) be performed between September 30th and November 22nd, 2019? Is this the timeline for Project Deliverable 1?

Yes, this is correct.

Q19. In addition to the written response and instructions, is there anything else we need to know about the format of the submission, preferences for layout, organization, etc. beyond what is stated in the RFP?

No

Q20. Does the University anticipate converting any data into the new ERP from legacy systems? If so what type of data, how many years and/or Gigabytes of data?

The data to be converted is TBD. We will need to convert some data, however we have options of ensuring the data is available via our warehouse to meet some of the needs. How much data will be determined as we move forward.

Q21. Does the University know if the ERP system will need to integrate with any other University and/or third party systems? If so how many? Can you provide an inventory of integrations or is this to be determined in the assessment?

The integration points will be listed as part of the readiness assessment. We will have integration to other university and 3rd party systems.

Q22. Do you have any specific encryption requirements for data at rest, in transit?

Data should be encrypted at rest and in transit.

Q23. What languages other than English will need to be deployed?

Any ERP application reviewed will need to support multilingual and multicurrency. UA is a very diverse University and we are expanding our presence in Global campuses. We need the software to be able to expand with us.

Q24. How many concurrent users do you have for ERP Financials? A range is fine - example: 100 -300, 500-1000, etc.

System usage varies dependent in time and needs. 400-600 concurrently would be high usage.

Q25. As part of the assessment is the University expecting the vendor to come up with financial consolidation strategy? Revamp Chart of Accounts?

We are in the process of revamping our chart of accounts. This will continue as part of the implementation process.

Q26. As part of the assessment is the University expecting the vendor to come up with data conversion/migration, Integration and Reporting strategies?

Determining them in detail is not needed. However determining our ability and readiness will be important.

Q27. Is the expectation that the vendor will perform process redesign and provide that as part of the assessment and/or implementation?

The readiness assessment will not perform the process redesign.

Q28. Does the University have any roadmap for future transformation with other back office technology such as Campus Administration, HR and Financial Planning & Analysis?

FP&A team is currently in the middle of an implementation process adopting new technology from Axiom-Kaufman Hall for budget and financial planning.

Q29. What functional areas of the University are represented on the selection committee?

It is University best practice not to release this information during an RFP that has not been awarded yet.

Q30. Who will serve as the project sponsor? What office is coordinating this initiative?

It is University best practice not to release this information during an RFP that has not been awarded yet.

Q31. Is the readiness assessment meant to inform requirements for ERP system selection?

It will inform the requirements for the ERP selection.

Q32. Can the University provide an estimated timeline for its implementation project to support fixed fee pricing related to the Project Manager role as described in 1.1.2?

This is a 3-4 year effort.

Q33. Can companies from Outside USA can apply for this? For example, companies based in India or Canada?

Yes.

Q34. Would awarded vendors need to be on-site for meetings?

Yes. Please note RFP Section 5 outline of Deliverable 1 and Deliverable 2 state that on-site services are required.

Q35. Can awarded vendors perform the tasks for Deliverable 1 or Deliverable 2 outside of the USA (from India or Canada)?

UA prefers that all work performed on this RFP is completed within the United States.

Q36. Can we submit the proposals via email?

No. Please see RFP Section 3.8 for submission instructions.

END OF ADDENDUM