



REQUEST FOR PROPOSALS

8.20.2018

Integrated Enterprise Resource Planning System (ERP)

Contents

- Introduction 2
 - Background on FVCC..... 2
 - FVCC Points of Contact 2
- Response Requirements and Format..... 2
 - Technology - Please see attached document for query of functionalities 3
 - Hosted Services..... 3
 - Business Process Framework (BPF)..... 3
 - Flexibility and Scalability 4
 - Security 4
 - Application and Data Security and Audit-ability 5
 - Data and System Functionality 6
 - Built-In Business Intelligence 6
 - Mobile 6
 - Deployment Services 7
 - Support Services 8
 - Customer Service and Technical Support 8
 - Upgrades and Maintenance..... 8
 - Training 9
 - Documentation 9
- College’s Right to Investigate and Reject..... 9
 - General Qualifications/Informational Requirements 9
 - References 9
 - Outstanding or Previous Litigation 10
 - Resumes / Company Profile & Experience 10
- Cost Proposal 10
- Basis of Evaluation 11
 - Scoring Guide 11
 - Evaluation Criteria Total of 1250 Points 12
- Dates and Deadlines 13

Introduction

This Request for Proposal (RFP) is being issued by Flathead Valley Community College (hereinafter referred to as FVCC) to solicit proposals for an integrated Enterprise Resource Planning system (ERP), encompassing all of the necessary functionality of an integrated Student Information System (SIS), Constituent Relationship Management system (CRM), Financial Information System (FIS), and Human Resource/Payroll System (HRIS) from qualified, experienced, financially sound, and responsible providers. FVCC reserves the right to eventually implement all of these system or individual systems, depending on product, service, price and fit within the organization.

Background on FVCC

Founded in 1967, FVCC is dedicated to promoting excellence in lifelong learning, focused on student success and community needs. Located in Northwest Montana, FVCC serves nearly residents over a two-county region covering more than 5.6 million acres, an area larger than the state of Massachusetts. FVCC's main campus is located in Kalispell, Montana, and a satellite campus is located in Libby, Montana.

FVCC provides high-quality academic programs taught by excellent faculty. Students may choose from more than 50 career and technical programs or transfer to a four-year university or college to pursue a bachelor's degree. FVCC also offers: concurrent enrollment courses for high school students; online classes; interactive television courses; select undergraduate and graduate degrees through partnerships with various Montana colleges and universities; customized workforce training for area businesses; and non-credit classes for students of all ages.

FVCC's small class sizes, personalized student support services, diverse financial aid packages and scholarship opportunities, along with the value of education we provide are just a few of the many reasons why students choose to further their education here.

FVCC Points of Contact

RFP Questions and Clarifications

Vendors should compile their questions or requests for clarification and submit them via email to Bill Bond, bbond@fvcc.edu. Beckie Christiaens, bchristiaens@fvcc.edu will issue answers in writing to submitted questions or requests for clarification by the question deadline in the schedule/time.

Response Requirements and Format

Vendors must complete the mandatory response document file provided with this RFP. In addition, vendors must provide further response information in Microsoft Word format.

Please answer or provide the requested content/documentation for the following items:

Section 1 – Company Overview:

- a. Name: Provide the legal company name, address, and telephone number of the legal entity.
- b. Legal Structure: Describe the legal structure of your company.
- c. Leadership: Provide details on the leadership of your company in all key areas. Include an organizational chart showing the line of authority including individual names, and titles.
- d. History: Explain your corporate history, length of time in the higher education niche, market share,

and number and type of higher education clients.

- e. Mission: Explain your corporate mission, vision, and long-term strategic initiatives.
- f. Finances: Provide information demonstrating the financial performance of your company, including information relevant to your ongoing financial stability.
- g. Provide an overview of your ERP product portfolio. Explain your product strategy and roadmap for the next release.
- h. Plans: List and describe any major development plans and initiatives for the next three years related to the scope of this RFP, including strategy for the next two releases.
- i. Other Products: List and describe other products beyond those listed in this proposal that may benefit the institution.
- j. Fit: Explain what makes your company uniquely qualified to fulfill the institution's needs.

Section 2 - License Conditions:

Specify the terms and conditions for using the licensed software proposed in response to this RFP. Include the license documents for all software, installation, and maintenance services.

Section 3 – Proposed Staffing:

Describe the staff who will be assigned to work with FVCC throughout the implementation process and beyond.

[Technology - Please see attached document for query of functionalities](#)

[Hosted Services](#)

1. How many data centers do you have?
2. Who are your Internet Service Providers, and how many per data center do you have?
3. Do you perform security audits of your data center? If so, please describe frequency, types, and who performs.
4. Describe what types of security certifications you have attained (i.e. SAS70, etc.)
5. What virus detection/scanning mechanisms are in place? Is there an Intrusion Detection System (IDS) in place?
6. What is your overall system availability and response time Service Level Agreement (SLA) that you are willing to commit to? How is it measured? Describe the types of real-time performance & availability monitoring and how you monitor and manage SLA results?
7. What are your published system maintenance windows?
8. Will FVCC own the employee and student data under the hosting agreement?

[Business Process Framework \(BPF\)](#)

1. Describe your workflow services.
2. Describe your ability to configure notifications upon hire or termination via both email and APIs to enable automated business workflow orchestrations.
3. What tools are available to enable workflow in your system?

4. Are we able to define globally consistent business processes with regional variations for workflow routing and approval?
5. Are we able to start from a catalog of predefined business processes? How many of these are available out of the box? Are the out-of-the-box business processes delivered based on global requirements for local regions? Ex. On-boarding and worker movement based on local compliance.
6. Are we able to re-configure business processes as needed, ex. Add or remove steps from an established business process without writing any code?
7. Does your system accommodate non-disruptive business process changes? Ex. Users assigned to a process task have the ability to add an additional approval step to the process as an additional parallel step without having to restart the process? Do these ad hoc approval steps affect only the current process instance the user is assigned and are they fully traceable?
8. Do adjustments to organization structures take effect in real time, with changes to roles and reporting structures incorporated instantly into all defined business processes and workflows?
9. How does your system provide visibility into business process-related information? Are users able to see the status of business processes directly on their homepage when they log in? Are users able to process approvals and "to-dos" from their mobile devices?
10. Does your system support enabling specific business processes according to our organizational structure and to have differing processes for each level or structure of the organization? For example, a global standard for hire process with unique workflow based on if/then analysis for specific roles (ex. Research and Development) or for specific countries, regions, brands or coalitions?
11. Does your system allow for electronic approval and routing processes of business transactions?
12. How does the upgrade process affect business workflow configurations that are unique to us? Do these workflow configurations survive upgrades or do they need to be re-configured with each upgrade?
13. Is there any limit to the number of approvals an action can go through? Can there be different workflow or approval paths based on reason or if/then else logic of a change (e.g. over threshold, level of person requesting the change)?
14. What level of IT involvement is required to set up workflow and integration with other standard office software (Microsoft Excel, Microsoft Word, standard email packages)?

Flexibility and Scalability

1. How customizable is your web-based system, and does customization interfere with future upgrades?

Security

1. What type of security is built into your solution? How many levels of security are involved?
2. Is the security system organized by function, transaction, or field?
3. How is computer terminal identification incorporated into security?
4. Does the web-based system permit assignment of various permission levels of data viewing, editing, approving to different people?

5. Does your company create daily backups? Where are the backup servers? How many days or months is a particular instance of a daily backup available for recovery?
6. Are there other protective procedures to protect data from being lost or accessed by unauthorized parties?
7. Does your application system meet compliance regulations for data security? Will its functionality comply with governing acts at the federal, state and international levels?
8. What is the length of time set on the system before an inactive screen will timeout and require an employee to log in again? What happens to the information already entered when the system times out?
9. How are password and user identification checks performed?
10. Is a unique login and password assigned to each person? Describe policies to deflect cracking attempts. Explain the process of how a person would get this information. What if they lose the information, how do they obtain the information?
11. Are access logs maintained by user identification and what is contained on them?
12. How does security differ for each sub-system, module, and report writer?
13. Will you notify our organization if there is a breach or suspected breach of security of any kind? Describe your policies and procedures if there is a breach or suspected breach of security of any kind.
14. Is data being transferred in encryption format? Explain your process and format.
15. Are you compliant with all aspects of the Sarbanes-Oxley Act (SOX) in the U.S.?
16. Do you conduct regular audits and provide the reports?
17. Provide your security policy to ensure proper policies and procedures are in place to protect our data.
18. Who sets the controls for who can see what on the system?
19. How are National Identity numbers protected?
20. How do you secure a high-availability environment?
21. Do you provide monitoring and audit capabilities into business processes to provide visibility and ensure compliance?
22. How do you secure compliance with European Data Protection laws (European Union and each local country) in terms of data storage and data processing?

Application and Data Security and Audit-ability

1. Can security be defined for users viewing and updating data, and can security be further defined at the function, page, and field level? Does the same security setup apply for your reporting tool?

2. Describe how your system supports role-based access controls to ensure people have the appropriate access to data based on primary organizational roles. Describe role-delegation and role-proxy functionality.
3. Can the administrative user control security or is it reliant on the vendor?
4. How does the application handle authentication, privacy and data integrity to insure that our data is not accidentally accessed by another of your customers?
5. What rules do you support concerning length, number of characters, repeats, expiration, etc. for passwords?
6. Is the system's password file encrypted using an encryption algorithm? If so, what algorithm?
7. Describe how security is implemented in the standard and ad hoc reporting modules.
8. Does your system provide an audit report of personnel access to systems and data? Explain.

Data and System Functionality

1. Are pending transactions re-edited against current tables and rules when applied?
2. Can table data be held until a specified future effective date?

Built-In Business Intelligence

1. Describe how business users will have access to standard reports and what capabilities exist to create new reports and analytics.
2. Describe your Reporting Tool.
3. Does your company need to be contracted for building more complex reports or can we build everything in-house?
4. If in-house, describe the capabilities of all report writers in detail. Can the report writer access all areas of the web-based system? Are the report writers the vendor's own products or from another vendor?
5. What types of exception reports are generated and what is contained on them?
6. Can business processes be configured by a business user to display reports and analytics at any point in the process?
7. Can the system support links to other websites? Are there any restrictions? If so, please describe.
8. Can you report on historical data? Please provide details.

Mobile

1. Can your system take advantage of mobile and/or GPS enabled mobile devices? Describe the types of transactions, reports. How is security measured?
2. What is your mobile strategy/technology overview?
3. Can you submit / approve expenses through the mobile device?

4. Can you attach images of receipts (picture or scan) from the mobile device?
5. Describe any mobile applications available in support of your solution(s). Is there an app available for students to check their accounts, see deadlines, etc.?
6. What open source software is included as part of your solution or is required to run your solution?
7. How do you ensure data security when individuals are executing transactions or reviewing data via a mobile device?
8. How do you incorporate usable and useful mobile access, social media, and analytic capabilities?
9. What are the costs to deploy on mobile? Does this require additional licenses and/or implementation fees? Is the solution available on the Apple and Android stores?

Deployment Services

1. Describe your approach to deployment. Do you support a phased deployment of different modules? Please describe how this is accomplished.
2. Identify the team that would be assigned to this project (implementation, customer service, training, ongoing, etc.) along with their experience, role and responsibility.
3. Identify who has ultimate responsibility, and who can be contacted in the event of a conflict between the project leader and our organization.
4. Describe the project management tools that are typically used during your deployments (e.g., work plans, meetings, conference calls, status reports, work flow charts, issues log and resolution, staff management, budget status, etc.).
5. Describe the typical deployment timeline for a customer similar to our organization. Provide a project timeline overview shown in phases, sprints, and tasks specific to this project.
6. Does the system allow for the importing of initial data? Please outline the types of data which can be imported and the number of trial imports allowed.
7. What is the average time to deploy the software?
8. Provide a detailed explanation of the data conversion process.
9. What support will be provided for deploying and customizing the system?
10. Explain your testing process including types of testing, methods for resolving discrepancies, and criteria for ensuring the testing is complete.
11. Are there extra charges for installation, testing, or coordination with our current systems, both hardware and software? If so, please outline all additional charges in the COST section of the questionnaire.
12. Provide a detailed deployment plan and targeted dates for completion of key tasks.
13. Confirm that you have the appropriate team that will be available and committed to our organization during this time to ensure a successful and timely deployment.

Support Services

Customer Service and Technical Support

1. Describe the support model that you use.
2. What methods are available for communications to your support center?
3. Is unlimited service included?
4. What are the credentials of the customer service and technical support personnel fielding the questions?
5. Do you survey current users on the quality of the support, and if so, how frequently? If so, provide your most recent report.
6. Is the customer and technical support ongoing or is it only available for a certain period of time after the implementation?
7. What is the turnover rate for your customer service and technical support personnel?
8. Describe the support provided during implementation versus post-implementation for both customer service and technical support?
9. Describe any security measures you have established for taking calls.
10. Where is your customer service department located?
11. What type and how much support are available during the conversion process?

Upgrades and Maintenance

1. What is the frequency of your product releases?
2. Describe the process for determining what new functionality is incorporated into future releases.
3. Describe your release QA process. What levels of quality do you commit to?
4. What is the migration process in upgrading to new versions? Consulting time? Average time-frames? Is our organization required to upgrade to the new version or can we set our own pace for the upgrades?
5. If configurations are made to the system, describe how these configurations are handled as we move to the next release?
6. How does the upgrade process affect customization?
7. What fees are involved in new releases?
8. Is a fully-functional “sandbox” environment where we can test upgrades and changes? If so, how long will we have the environment available and are there any additional costs?
9. Are there additional costs for upgrades? Or are they included in an annual maintenance contract?
10. How / when do you alert customers of the upcoming upgrades and enhancements? Do you provide ample time for HR to learn the upgrades and communicate/train employees?

11. Do you accept feedback from end users/customers as far as what upgrades and changes should be considered, or do you solely rely on programmers?
12. Will technical support be available through on-line maintenance and repair, on-site, or both?
13. Do you have the tools to conduct remote troubleshooting and assistance?

Training

1. Please describe what training options you offer.
2. Who will conduct the training, and what is the experience and expertise of the trainers?
3. How do you see user-training changing in the next 2 years?
4. Where are your training facilities?
5. Will user handbooks and technical manuals be provided? Will it include screen prints and examples?
6. What is the estimated learning curve for this system?
7. Are there more advanced training classes for more complex subjects?

Documentation

What documentation is available with your system?

College's Right to Investigate and Reject

FVCC may make such investigations as deemed necessary to determine the ability of the Offeror to provide the supplies and/or perform the services specified. FVCC reserves the right to reject any proposal if the evidence submitted by, or investigation of, the Offeror fails to satisfy FVCC that the Offeror is properly qualified to carry out the obligations of the contract. This includes FVCC's ability to reject the proposal based on negative references.

General Qualifications/Informational Requirements

In order for the FVCC to determine the capabilities of an Offeror to provide the supplies and/or perform the services specified in Section 2.0 above, the Offeror must respond to the following requests for information regarding its ability to meet FVCC's requirements. The response "(Offeror's Name) understands and will comply" is not an appropriate response for this section. Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found unresponsive or be subject to point deductions.

References

The vendor should provide details of three customers for reference. References should be for customers with requirements similar to those of this RFP. References should include at a minimum the customer name, contact name, title, address, e-mail address, and phone number. References should contain the most recent fully implemented ERP system, preferably led by the same team proposed to implement with FVCC. References shall also include an organization with a minimum of 2 years of experience with the fully implemented ERP system. These references may be contacted to verify Offeror's ability to perform the contract. FVCC reserves the right to use any information or additional references deemed

necessary to establish the ability of the Offeror to perform the conditions of the contract. Negative references may be grounds for proposal disqualification.

Outstanding or Previous Litigation

Offerors shall provide FVCC a list of any outstanding or previous litigation, which involved the proposed products or services offered in your RFP response. This information may be used to determine responsibility of the Offeror to perform the required services.

Resumes / Company Profile & Experience

Profile

The Offeror shall provide a company profile that describes the company’s qualifications for performing the services described in Section 2.0. Offeror shall specify how long the individual/company submitting the proposal has been in the business of providing supplies and/or services similar to those requested in this RFP and under what company name. The Offeror must disclose any ownership, sales agreement or partnership (formal or informal) with any industry-related entities.

Financial Stability

Offerors shall demonstrate their financial stability to provide the services specified by: (1) providing financial statements, preferably audited, for the two (2) consecutive years immediately preceding the issuance of this RFP.

Cost Proposal

Cost Breakout	Year 1 Cost \$	Year 2 Cost \$	Year 3 Cost \$	Comments-please provide additional information as an attachment to this table and include it with your response.
Software License – SIS				
Software License – CRM				
Software License - Finance HR Payroll				
Software Maintenance				
Application Cloud Hosting or SaaS				

Implementation Services				
Hardware				
Customizations				
Total				

Basis of Evaluation

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria. The total number of potential points is 1,250.

The Scope of Work, References, Resumes/Company Profile and Experience portions of the offer will be evaluated based on the following Scoring Guide. The References, and Prior Litigation portion of the offer will be evaluated on a pass/not pass basis, with any Offeror receiving a "not pass" may be eliminated from further consideration at the discretion of the procurement officer. The Cost Proposal will be evaluated based on the formula set forth below.

A "not pass" for any individual evaluation criterion may result in proposal disqualification at the discretion of the procurement officer.

Scoring Guide

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

Superior Response (90-100%): A superior response is a highly comprehensive, excellent reply that meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to FVCC.

Good Response (75-89%): A good response meets all the requirements of the RFP and demonstrates in a clear and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The Offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The Offeror has not demonstrated sufficient knowledge of the subject matter.

FVCC reserves the right to choose the top two or three highest scoring Offerors, as voted on by the selection committee.

Evaluation Criteria Total of 1250 Points

Scope of Services> 25% of points (312.5 possible)

Category	Section of RFP	Point Value

General Qualifications /Informational Requirements> 20% of points (250 possible)

Category	Section of RFP	Point Value

Cost Proposal> 55% of points (687.5 possible)

Category	Section of RFP	Point Value

OPTION 1 (based on PAR issued) and OPTION 2 (based on flat fee)

Category	Section of RFP	Point Value

Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 687.5. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 687.5 points, Offeror B would receive ~460 points ($\$20,000/\$30,000 = 67\% \times 687.5 \text{ points} = 460.625$).

Dates and Deadlines

Proposal announced August 20, 2018

Contractors may ask questions by emailing bbond@fvcc.edu, Bill Bond

Proposals due September 10, 2018

Public scoring September 17, 2018

Best and final pricing from finalist vendors September 21, 2018

Final review of vendor offerings and vendor selection September 30, 2018

Contract awarded October 15, 2018