



REQUEST FOR PROPOSAL RFP# 5038ME

FOR: (A) CLOUD ERP SOFTWARE SOLUTION; (B) IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; AND, (C) DATA WAREHOUSE IMPLEMENTATION

RFP Issued Date: March 7, 2025

ADDENDUM #3

Key Dates, Questions and Answers

Questions due by: March 14, 2025 by 2:00pm EDT via email with the RFP # in the subject line

Proposal Due Date /Time: March 27, 2025 by 2:00pm EDT via email with the RFP # in the subject line

Contact:

Michael Eames or Debbie Thomas

Purchasing Manager/Purchasing Analyst

bids@csuohio.edu

Proposals must be received by the due date/time specified above. Proposals received after the due date/time will be returned unopened to the supplier

Please refer to the attached sheets for Instructions & Information. Proposals must be submitted on the form(s) provided and signed by an authorized representative in ink in the proper spaces. Vendors are cautioned to read this entire document carefully and to prepare and submit their Proposal providing all requested information in accordance with the terms and conditions set forth herein.

Addendum #3, Key Dates - RFP schedule and Questions and Answers, RFP #5038ME

FOR: (A) CLOUD ERP SOFTWARE SOLUTION; (B) IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; AND, (C) DATA WAREHOUSE IMPLEMENTATION

Based on our current schedule below, we can extend the deadline by two weeks to April 17th (Due at 2:00pm EDT)

Key Dates - RFP schedule:

- March 7: RFP posted
- March 14: Q&A session, vendor questions fielded, Due at 2:00pm EDT
- March 20: Responses completed and sent
- March 27: Original Vendor bid submission deadline
- April 17: Extended deadline for vendors, Due at 2:00pm EDT
- April 25: **Project A** vendors notified of whether they will be presenting
- May 2: **Project B** vendors notified of whether they will be presenting
- May 5 – May 9*: **Project A** vendor presentations
- May 9: **Project C** vendor notified of whether they will be presenting
- May 12 – May 16*: **Project B** vendor presentations
- May 19 – May 23*: **Project C** vendor presentations

*Requests for alternate dates will be assessed on a case-by-case basis.

RFP# 5038ME Questions and Answers

1Q. To ensure we can provide a comprehensive and high-quality response, we would like to formally request a three-week extension to the proposal due date.

1A. The bid submission deadline has been formally extended to April 17th.

2Q. Clarification on Implementation Timeline Scenarios: We would appreciate clarification on the following points: The two scenarios described in the RFP focus on implementation timelines and considerations typically handled by an implementation partner rather than a software provider. Does CSU expect vendors to respond to these scenarios in conjunction with a specific implementation partner, or will implementation partner proposals be evaluated separately after selecting the software vendor? This distinction is important, as different implementation partners may approach these scenarios in varying ways, which could impact how CSU evaluates the ERP software solution and its overall fit for your needs.

2A. Implementation partner proposals will be evaluated separately after selecting the software vendor. We will be issuing a separate Systems Integrator RFP for this purpose.

3Q. Estimated Vendor Presentation Dates: Could you share tentative date ranges for vendor presentations? This would help us plan internal resources and ensure availability if selected.

3A. The bid submission deadline has been formally extended to April 17th.

Key Dates:

April 17: Extended deadline for vendors, Due at 2:00pm EDT

April 25: **Project A** vendors notified of whether they will be presenting

May 2: **Project B** vendors notified of whether they will be presenting

May 5 – May 9*: **Project A** vendor presentations

May 9: **Project C** vendor notified of whether they will be presenting

May 12 – May 16*: **Project B** vendor presentations

May 19 – May 23*: **Project C** vendor presentations

*Requests for alternate dates will be assessed on a case-by-case basis.

4Q. Will selected vendors be granted discovery with functional users prior to vendor presentations?

4A. No.

5Q. In section 2 Project Scope and Overview, bullet e references integration with the new ERP system, LMS, CRM and other enterprise applications. Can you please share what those applications are?

5A. Proposals should support modern ERM, CRM, and LMS solutions in the higher education space.

6Q. I would appreciate clarification on the timing of the addendum. The RFP lists two possible timelines for its release. Will it be posted within 48 hours of the March 14th deadline, or on March 20th? Given the number of questions related to implementation, we would like to understand if there's any possibility of receiving answers to the implementation questions sooner, as this will significantly impact our response and resource planning. I appreciate your help and look forward to your response.

6A. All vendor inquiries will be addressed in a formal response by the stated deadline of March 20th.

7Q. Do you happen to have a cost estimate or range for this project?

7A. No.

8Q. With the new April 3rd deadline now being just one week out from the potential vendor presentation window, I wanted to reach out with another request. We understand that demo invitations won't be extended until April 4th. However, to help with internal resource and demo planning, would it be possible for CSU to hold two tentative presentation dates for us in the event we are invited to present? April 10th and 11th are currently available for our team, and securing tentative slots on those dates would help us avoid last-minute conflicts and ensure we can provide a well-prepared presentation.

8A. The bid submission deadline has been formally extended to April 17th. We acknowledge the request to hold two dates for presentations, and the updated ERP presentation timeline is now scheduled for May 5th – May 9th. Requests for alternate dates will be assessed on a case-by-case basis.

9Q. What is the total number of sources systems to be integrated?

9A. There are four primary enterprise sources that will need to be integrated.

10Q. What are the known, defined and confirmed sources systems that will be integrated?

10A. The primary goals for the solution will center on the HCM, Finance, Academics, and Identity systems.

11Q. What are the number of tables per source system that will be deployed in the new data warehouse?

11A. Source system tables will vary. A rough estimate of the counts would be 30-50 tables per system.

12Q. How many reports will be required to be defined, built and implemented?

12A. There are roughly 50-100 reports across the organization. Proposals should enable the organization to scale.

13Q. Can you validate the scope of the data warehouse project is for analytical reporting only and NOT operational integration (ODS)

13A. The scope of the warehouse would not include an ODS.

14Q. Data Governance – Master Data Management (MDM)

14A. MDM should be covered in the proposal.

15Q. Is the scope only to establish a data governance counsel?

15A. The scope should help the organization establish a data governance council.

16Q. If MDM is required, how many domains are to be included?

16A. There are four primary business domains that would be included.

17Q. If MDM is required, has the MDM tool been selected or confirmed?

17A. The organization is open to recommendations for an MDM tool.

18Q. Has a data catalog tool been selected or confirmed?

18A. We are open to the recommendations of the proposal.

19Q. Can Cleveland State University please provide the following information regarding their employee population: Employee Category, Employee Count, Full Time, Part Time, Associates and Student Workers, Contingent Workers (non-permanent workers who perform a specific task / service for CSU such as freelancers, consultants, etc, Former Workers with Access.

19A. Affiliate: Full-time 8, Part-time 639, Total 647 |
Faculty: Full-time 538, Part-time 2, Total 540 |
Intermittent- IATSE: Full-time 2, Part-time 241, Total 243 |
Intermittent SSP: Full-time 0, Part-time 27, Total 27 |
PT Faculty - Intermittent: Full-time 0, Part-time 888, Total 888 |
Staff: Full-time 758, Part-time 51, Total 809 |
Student: Full-time 0, Part-time 1943, Total 1943 |
CE Presenter: Full-time 0, Part-time 59, Total 59 |
Intermittent- WOL: Full-time 0, Part-time 25, Total 25 |
Grand Total: Full-time 1306, Part-time 3875, Total 5181

*Affiliate status includes volunteers, Instructors paid by other entities, consultants, contractors, etc.

Others not included in the above, that are not Active but have access due to status (Emeriti, Associate of the University):
ASSOC 182 | EMERITI 390, Grand Total: 572

20Q. Can Cleveland State University please provide the following information regarding your student population: Student Type, Student Count, Students reported to IPEDs in the latest reporting period, Students attending CSU not reported to IPEDs (continuing ed students, etc)

20A. Enrollment Headcount - 2025
Full-time Undergraduate Head Count: 7501
Part-time Undergraduate Head Count: 1981
Full-time Graduate Head Count: 2868
Part-time Graduate Head Count: 1724

Student Head Count by Category - 2025
Certificate-Seeking Undergraduate: 4
Degree-Seeking Undergraduate: 8969
Post-baccalaureate Certificate-Seeking: 36
Post-baccalaureate Degree-Seeking: 4384
Non-degree-seeking: 722

21Q. To confirm, as a respondent we submit final bids on April 3rd with an extension request posted in the addendum. Is that accurate?

21A. The bid submission deadline has been formally extended to April 17th.

22Q. Are electronic signatures allowed?

22A. Yes, CSU allows electronic signatures for proposal submission. Vendors must ensure that all electronically signed documents are valid and legally binding.

23Q. Could CSU please clarify if vendors are to respond in more than one project should they submit them in the same document or provide different response for each one?

23A. Vendors should submit a single response document that includes all projects they are bidding on. The response should be clearly broken down by project (e.g., separate sections for Project A - ERP, Project B - IDM, and Project C - Data Warehouse).

24Q. Is there a mandatory subcontracting goal for MBE? If yes, could CSU kindly provide the pertinent details please?

24A. No.

25Q. In section 0. Instructions is stated "Original signatures must be included with the "original" copy." Could CSU please clarify if vendors are to submit additional copies of the proposal besides the one that must be submitted via email?

25A. No, vendors are not required to submit additional copies. The version submitted via email is considered the original copy. Vendors should ensure all required documents are included in their email submission.

26Q. In case firms are submitting confidential information in the response, is it required to provide a redacted version?

26A. Proposals are subject to the Ohio Public Records Act, Ohio Revised Code Section 149.43 (<https://codes.ohio.gov/ohio-revised-code/section-149.43/4-9-2025>) and considered "Public Records" under the act. Proprietary information and trade secrets included in a Proposal may be excluded from disclosure. Vendors claiming trade secret status bear the burden to identify and demonstrate that the material is included in categories of protected information under Ohio Revised Code 1333.61(D). See Chapter III of the Ohio Sunshine Laws Manual <https://www.ohioattorneygeneral.gov/Files/Publications-Files/Publications-for-Legal/Sunshine-Laws-Publications/2024-Sunshine-Manual.aspx>

27Q. Could CSU please clarify if vendors should add audited financial statements in the response or is it required post award? If yes, in what section should vendors add it?

27A. Submission of audited financial statements is not mandatory with the proposal. However, CSU reserves the right to request financial documentation, including audited financial statements, during the evaluation process or post-award if needed. Vendors may include financial statements voluntarily to demonstrate financial stability.

28Q. Could CSU please clarify how many years of financial statements should vendors submit?

28A. The RFP does not specify a required number of years for financial statement submissions. If requested during the evaluation process, CSU may ask for up to three years of financial statements as a best practice. Vendors submitting financial information voluntarily should consider providing at least the most recent year's audited or certified financial statements to support their proposal.

29Q. Is it mandatory for vendors to submit Dunn & Bradstreet ratings? If yes, in what section of the response?

29A. No, submission of a Dunn & Bradstreet rating is not mandatory. However, vendors may provide it as part of their financial documentation if available, as CSU may consider financial stability as part of the evaluation process.

30Q. Is it mandatory for vendors to submit audited financial statements? If yes, in what section of the response?

30A. No, submission of audited financial statements is not mandatory.

31Q. Could CSU please confirm if there will be an on-campus presentation for this solicitation?

31A. The top candidates will be invited to give a presentation. CSU recommends on-campus presentations with hybrid availability for those unable to attend in person. However, exceptions can be made on a case-by-case basis.

32Q. Could CSU please clarify if there will be a mandatory pre-proposal meeting for this solicitation?

32A. No, there is no mandatory pre-proposal meeting for this solicitation.

33Q. Could CSU please clarify what types of licenses, certifications, or other credentials should vendors have for this solicitation?

33A. Vendors must possess and maintain all qualifications, licenses, certifications, and other credentials required by federal, state, and/or local governmental authorities for the performance of the services.

CSU reserves the right to request documentation of these qualifications at any time during the evaluation process or contract term. The successful proposer must furnish documentation within five (5) days of a written request by the university. For additional information on business licenses required to conduct business in the state of Ohio, vendors can refer to Ohio Business Licenses and Permits. <https://ohio.gov/jobs/resources/licenses-and-permits>

34Q. Could CSU please clarify if vendors should have the applicable licenses, certifications, or other credentials at the time of submission or is it required post award?

34A. Vendors are required to possess and maintain all qualifications and credentials necessary for the performance of services, including any required licenses and certifications. The successful vendor must furnish documentation of these qualifications within five (5) days of a written request by CSU.

If a vendor does not currently hold a required certification or license but is in the process of obtaining it, they should provide written documentation confirming their progress, along with an estimated timeline for completion. CSU reserves the right to evaluate these cases on an individual basis to determine vendor eligibility.

35Q. Could CSU please confirm if in case vendors do not have the applicable licenses, certifications, or other credentials at the time of the submission, could they provide proof that they are in the process of obtaining it?

35A. Vendors are required to possess and maintain all qualifications and credentials necessary for the performance of services, including any required licenses and certifications. The successful vendor must furnish documentation of these qualifications within five (5) days of a written request by CSU.

If a vendor does not currently hold a required certification or license but is in the process of obtaining it, they should provide written documentation confirming their progress, along with an estimated timeline for completion. CSU reserves the right to evaluate these cases on an individual basis to determine vendor eligibility.

36Q. Should vendors include a statement in their proposal confirming that they have no exceptions to the terms and conditions if applicable?

36A. Only exceptions need to be stated.

37Q. Could CSU please clarify if vendors should add a certificate of insurance within the proposal? If yes, in what section should vendors include it?

37A. A certificate of insurance is not required within the proposal.

38Q. Could CSU please confirm the number of documents to be submitted?

38A. The RFP requires vendors to submit a single proposal document covering all projects they are bidding on. The response should be clearly structured and broken down by project (e.g., separate sections for Project A - ERP, Project B - IDM, and Project C - Data Warehouse).

Additionally, vendors may include multiple scenarios per project with different cost structures. This flexibility allows CSU to evaluate various implementation options and select the solution that best fits the university's needs. Vendors should ensure that each scenario is clearly labeled and includes details on the implementation approach, timeline, risks, and cost considerations.
instructions.

39Q. Could CSU please confirm if there is a preferred format for the submission of proposals—Word or PDF?

39A. CSU prefers proposals to be submitted in PDF format to ensure document integrity and consistency. However, CSU will accept multiple formats, including Word documents, if necessary. Vendors should ensure that all attachments and required documents are clearly labeled and formatted for ease of review.

40Q. Is it mandatory for vendors to be certified by State of Ohio Department of Administrative Services, Equal Opportunity Division as a Minority Business Enterprise to participate in this RFP?

40A. No.

41Q. We are a California MBE firm certified by NMSDC. Do we need to submit our certification in the proposal? If yes, in what section should vendors add it?

41A. No.

42Q. Is it mandatory for vendors to be certified by State of Ohio Department of Administrative Services, Equal Opportunity Division as a EDGE qualified business enterprise to participate in this RFP?

42A. No.

43Q. Could CSU please clarify if vendors can meet the preference to Ohio vendors through a subcontractor?

43A. No. The "bidder or offeror" must have a significant economic presence as described in the relevant "Buy Ohio" authority. See: (1) Ohio Revised Code Section 125.09: <https://codes.ohio.gov/ohio-revised-code/section-125.09>; (2) Ohio Administrative Code Rule 123:5-1-06: <https://codes.ohio.gov/ohio-administrative-code/rule-123:5-1-06>; and, (3) University Policy 3344-65-03: <https://www.csuohio.edu/sites/default/files/3344-65-03-for-posting.pdf> .

44Q. Can a firm subcontract with various primes?

44A. Yes, a firm may subcontract with multiple prime contractors as long as there are no conflicts of interest, and the firm is able to fulfill its obligations under each subcontracting agreement.

45Q. Can a firm bid both as a prime contractor and as a subcontractor?

45A. Yes, a firm may submit a proposal as a prime contractor while also being listed as a subcontractor on another bid. However, each proposal will be evaluated independently, and the firm must ensure it can meet all contractual obligations in either capacity.

46Q. Could CSU please clarify if firms can utilize subcontractors to meet the requirements of this opportunity?

46A. Yes, vendors may utilize subcontractors to fulfill the requirements of this RFP. Vendors must clearly identify all subcontractors in their proposal, including their qualifications, roles, and responsibilities. CSU reserves the right to review and approve subcontractor arrangements to ensure they align with project goals.

47Q. Could CSU please clarify if subcontractor references are allowed to be used for the services provided?

47A. Yes, vendors may use subcontractor references for the services the subcontractor will provide under this RFP. However, vendors must clearly specify that the reference pertains to the subcontractor and ensure that it directly relates to the scope of work that the subcontractor will be responsible for.

To ensure clarity, vendors should:

- Label subcontractor references explicitly in their response.
- Describe the subcontractor's role in the referenced project.
- Explain how the subcontractor's experience aligns with the responsibilities they will have under this RFP.

CSU reserves the right to evaluate both the prime vendor's and subcontractor's qualifications as part of the selection process.

48Q. Could CSU please clarify the deadline for vendors to submit their proposals? Should it be submitted by March 27 at 2:00 PM EDT or April 3 at 2:30 PM EDT?

48A. The bid submission deadline has been formally extended to April 17, 2025, at 2:00 PM EDT.

49Q. Could CSU please clarify what is meant by goods in section 3. United States Product of Attachment B?

49A. This requirement is a standard clause in CSU's RFPs in regard to the domestic scoring preference provided under: (1) Ohio Revised Code Section 125.09: <https://codes.ohio.gov/ohio-revised-code/section-125.09>; and (2) Ohio Administrative Code Rule 123:5-1-06: <https://codes.ohio.gov/ohio-administrative-code/rule-123:5-1-06>. For this RFP, which focuses on software solutions and implementation services, the United States Product designation may not apply in the traditional sense.

However, vendors should still complete Attachment B and indicate that their proposal does not involve physical goods. If any hardware, licensed software, or third-party services include physical deliverables, vendors should disclose their country of origin in accordance with the RFP requirements.

50Q. Who is the incumbent vendor currently managing the ERP, IAM, and Data Warehouse solutions?

50A. CSU currently manages all three solutions in-house.

ERP: PeopleSoft (on-premise)

Identity & Access Management (IAM): Managed through our ERP and Azure AD

Data Warehouse: Utilizes Microsoft Fabric

CSU does not have an external vendor managing these systems. However, we maintain an Oracle support contract for PeopleSoft and a partnership with Microsoft for our data warehouse and identity management solutions.

51Q. Is the incumbent vendor allowed to participate in this RFP?

51A. Since CSU manages its own ERP, IAM, and Data Warehouse solutions in-house, there is no incumbent vendor for these services. However, CSU maintains an Oracle support contract for PeopleSoft and a partnership with Microsoft. These vendors, along with any other qualified vendors, are welcome to participate in this RFP if they meet the requirements outlined in the solicitation.

52Q. Is the expectation to develop a roadmap, or is the vendor responsible for implementing the Data Warehouse?

52A. The organization is looking for a roadmap and implementation.

53Q. What are the key pain points CSU is currently facing with the existing data warehouse?

53A. The organization does not currently have a formal data warehouse solution.

54Q. What are the current limitations of the proof-of-concept data warehouse?

54A. Scale and addressing use cases beyond the POC.

55Q. Can you please provide a list of data systems, including their type and size, that need to be integrated into the new Data Warehouse?

55A. There are four primary enterprise systems that will need to be integrated into the warehouse. HCM, Finance, Academics, and Identity.

56Q. What specific analytics and reporting capabilities is CSU seeking?

56A. Data trends, projections, time series analysis, dashboards, general data access, State and Federal institutional reporting.

57Q. Do you expect the data to be ingested and analyzed in real-time or near real-time?

57A. There are no current requirements for real time data ingestion for the data warehouse.

58Q. How does CSU currently manage data governance and security?

58A. Governance and Security and managed through the ERP and approval processes with data stewards.

59Q. What is the current data warehouse architecture, and what are the scalability expectations?

59A. The organization does not currently have a formal data warehouse solution.

60Q. Does CSU have a preference for cloud-based or on-premise data warehouse solutions?

60A. The organization would prefer a cloud solution.

61Q. How does CSU handle data backup and disaster recovery for the data warehouse?

61A. The organization does not currently have a formal data warehouse solution

62Q. What is the preferred cloud infrastructure (e.g., AWS, Azure, or Google Cloud)?

62A. Azure

63Q. Do you have an estimated project start date and desired go-live date for each project? Please mention in months.

63A. CSU aims to complete these projects within a reasonable time frame while ensuring the implementation follows best business practices and is executed correctly. We encourage vendors to recommend a time frame based on their proposed solution, including considerations for tiered, phased, or incremental implementation approaches where appropriate.

CSU is open to flexible deployment strategies, including phased rollouts that prioritize high-impact functionality first while allowing for a gradual transition. Since we are committed to selecting the best-fit solution for our needs, we do not have a fixed timeline. Vendors should provide a structured implementation roadmap that includes key milestones, dependencies, and risk mitigation strategies to ensure a smooth and successful deployment.

64Q. Do you expect the vendor to perform any tasks on-site, or can all work be performed remotely?

64A. CSU does not explicitly require vendors to perform work on-site. However, vendors must comply with all CSU policies while on campus, should on-site presence be needed. This includes, but is not limited to, health, security, and operational policies.

CSU is open to remote, hybrid, or on-site work arrangements based on the project's needs. Vendors should outline their recommended approach for on-site presence, if any, and describe how they will ensure effective collaboration and support regardless of location.

65Q. Do you accept off-shore resources?

65A. See State of Ohio Executive Order 2019-12D:

<https://governor.ohio.gov/media/executive-orders/2019-12d>. CSU is prohibited from entering into any contract to purchase services provided outside of the United States or that allows State Data to be sent, taken, accessed, tested, maintained, backed-up, stored, or made available remotely outside (located) of the United States, unless a duly signed waiver from the Director of the Ohio Department of Administrative Services has been attained. Following vendor selection, CSU may, in its sole discretion, seek such a waiver from Ohio DAS. Accordingly, please provide pricing for both domestic and off-shore services.

66Q. What is the approved budget or range allocated for each of these projects?

66A. CSU has not set a fixed budget for these projects, as the allocated budget will depend on the proposals received. This RFP is part of a larger Technology Transformation Initiative that CSU is undertaking. Our goal is to find the best solution that enables the university to effectively meet the needs of students, faculty, staff, alumni, and community members.

We encourage vendors to propose scalable and cost-effective solutions, outlining pricing structures that consider various implementation approaches, including tiered, phased, or incremental rollouts. Vendors may provide total cost of ownership (TCO) considerations and long-term sustainability factors to support CSU's decision-making process.

67Q. Based on the complexity of the requirements and the required response, will the university consider a two-week extension for the due date?

67A. The proposal due date has been formally extended to April 17, 2025, at 2:00 PM EDT.

68Q. For Project C - Can you describe your expectations regarding the timeline for this project? Is this project reliant on the software selection (Project A), and therefore should not start until you have decided on an ERP solution?

68A. The expectations for this project would be to support the reporting needs alongside Project A. As the implementation of Project A progresses, sources for data will need to be adjusted.

69Q. For Project C – section 2(a) seeks an architecture assessment based on Microsoft Fabric. Can you describe how you decided on Microsoft Fabric, or are you open to other options?

69A. The organization went through a review period with vendors, peer institutions, and Gartner.

70Q. For Project C – section 2(d) seeks an integration strategy, however the technology for various ERP systems like Workday and Ellucian offer differing tools. Is there a preferred approach/assumption for our response?

70A. Proposals should support integration with modern ERP solutions in the higher education space.

71Q. For Project C – section 2 (e) seeks a strategy for leveraging AI in data analytics. Does the university have an overall AI policy for campus and the staff?

71A. The organization does not have a strategy for AI in analytics, nor does it have an overall AI policy for campus.

72Q. For Project C – section 2(f), can you please provide an overview of the current resources and determined roles in the current data organization?

72A. The organization is looking for recommendations for the necessary staff required to support the service delivery of data analytics.

73Q. For Project C – section 3(a) seeks architectural planning to support both structured and unstructured data. Can you elaborate on the various data sources in your data estate?

73A. The primary focus of the data warehouse will be four large enterprise systems: HCM, Finance, Academics, and Identity. The proposal should enable the organization to expand their use cases.

74Q. For Project C – section 4(a) seeks an implementation scenario building upon an existing Fabric architecture.

74A. The organization has worked with Microsoft to produce a medallion architecture in Fabric leveraging workspaces for subject areas.

75Q. What licensing configuration(s) are in place for the existing workspace(s)? If multiple, do all capacities reside in the same region?

75A. We have a single capacity license at this time to facilitate a POC. The capacity is in one region.

76Q. Can you elaborate on the data sources in place for the proof of concept? How are these connections being managed? Is there a data gateway necessary and if so, how is that being hosted?

76A. There is a single data source in place for the POC which uses a Gateway to bridge connectivity into the organization from Fabric. Connections are managed in the Fabric portal, controlled through role based security. Service Principal is used in PowerBI to read data from the gold layer of a medallion architecture.

77Q. Does the proof of concept feature any CI/CD integration with a repository such as Azure DevOps or GitHub? Are deployment pipelines being utilized?

77A. The POC uses the in-the-box azure devops integration in Fabric.

78Q. Is there any reporting in production being sourced from the current Fabric environment?

78A. The POC is providing real data for real reports.

79Q. For Project C – section 5(a) lists requirements for vendor submissions including pricing proposals.

79A.

Proposals should include pricing.

80Q. In regard to software licensing, approximately how many report consumers and report builders should be factored into the pricing?

80A. Report consumers would number in the 100's, builders would be less than 50.

81Q. Similarly, can you help us better understand the volume of data in scope?

81A. There are four primary business domains that would be included in the data warehouse. This includes multiple decades worth of business data.

82Q. If a vendor is solely responding to Project C – are they required to respond to Item #6 “Network Connectivity, Performance and Integration Requirements”, specifically for questions about the direct connection and integration capabilities of the recommended/selected Cloud ERP solution (sections B, C, D, & E)?

82A. Proposals should include integration partnerships / vendor relationships for industry leaders in higher education.

83Q. For the Project C – should the implementation plan and pricing proposal focus primarily on building out the strategic roadmap, governance model, and execution framework for CSU or should it also include any planning and estimates around the actual execution and implementation?

83A. The organization is looking to implement on the plan that is proposed.

84Q. How many full-time employees are there?

84A. 1298

85Q. How many part-time employees are there?

85A. 3236 (includes all paid employees)

86Q. How many student workers are there?

86A. 1943 (includes Student Workers and GA's, they are included in the PT number above)

87Q. How many employees are in the procurement department?

87A. 5

88Q. How many employees are in the finance department?

88A. 20

89Q. How many employees will need access to expense reports?

89A. 25 (Number may be larger depending on the administrative processing end, this number is likely greater given Travel forms, etc....)

90Q. What are the authoritative sources of identity?

90A. We plan to move off our current on-prem ERP, which necessitates implementing a new ERP.

91Q. How many ISIRs were processed for Fall 2024?

91A. 14889

92Q. How many applicants were there for Fall 2024?

92A. 10735

93Q. How many students received any financial aid for Fall 2024?

93A. 10134

94Q. What are the access management targets? And what login protocols (e.g., SAML, OIDC, etc.) do they support?

94A. 99% of our applications support SAML and OIDC. We do have some on-prem legacy systems that we are working to decommission, but currently only support LDAP. We do not require this solution to accommodate this need, but would be nice to know what legacy authentication options the proposed solution offers from a flexibility perspective. We would also like a list of all supported protocols.

95Q. How many application lifeguard environments will be in-scope for each access management target? (E.g., dev, test, prod, ...)

95A. We would like four total: Dev, Test, staging and Prod. But would also like to understand the cost difference if we combined test and staging, giving us three total.

96Q. Is attestation or verification a required activity of this effort? If so, what are the parameters for the attestations?

96A. Yes, we currently have a workflow within ServiceNow for attestation for specific use cases such as elevated ERP authorization. The solution should offer attestation options that allow us to create similar workflows.

97Q. Will the vendor presentations be scripted or include specific use cases that will need to be addressed?

97A. Vendor presentations will follow a structured format, which may include scripted components and predefined use cases to ensure a comprehensive evaluation. Specific details regarding the presentation structure and any required use case demonstrations will be provided to selected vendors in advance.

98Q. Business Process Analysis i. - Can you please elaborate on the analysis? Is it an analysis to see how the system is performing?

98A. The Business Process Analysis referenced in the RFP is not an assessment of system performance but rather a structured evaluation of CSU's current business processes as part of the system implementation. The purpose of this analysis is to align CSU's operations with the best practices inherent in the ERP system, minimizing the need for source code modifications.

Vendors are expected to describe the services available to conduct such an analysis, ensuring CSU's business processes are configured efficiently within the ERP solution. Additionally, vendors should outline their approach to addressing CSU's unique business requirements through configuration or other means that do not require source code modifications.

The response should also include capabilities related to data element configuration, API integration, workflow automation, compliance with Federal and State regulatory updates, and the frequency and responsibility of applying such updates. CSU seeks a comprehensive understanding of how vendors will facilitate business process optimization within the ERP framework.

99Q. Question on naming conventions / verbiage - Are these rules related to approval workflows? Or rules-driven controls and automation across the entire solution?

99A. The naming conventions and verbiage referenced in the RFP pertain to rules-driven controls and automation across the entire solution, rather than being limited solely to approval workflows. These rules are designed to enforce business logic, streamline processes, and ensure compliance with institutional and regulatory requirements.

Vendors should describe their system's capabilities for defining, managing, and applying rules at multiple levels, including but not limited to approval workflows, business process automation, security access control, and policy enforcement. The response should also outline how the system accommodates configurable rules that can be updated dynamically to adapt to evolving operational needs without requiring source code modifications.

100Q. (B) IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; Is the scope limited to Students and Employees (Campus Solutions and Human Resources), or are there additional systems for managing identities of affiliates, guests, alumni, and other non-employee/student personas?

100A. The scope would encompass all identities to replace our current custom solution that connects our ERP with Active Directory, which then syncs to Microsoft Entra.

101Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; Are all IDs managed through a central source?

101A. Our ERP is our system of record that, coupled with custom code, creates the IDs in active directory which syncs to Microsoft Entra.

102Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; What is the count of current active and inactive identities?

102A. ~30,000 active, 100,000 inactive. We are open to changing our inactive decommissioning process as a part of this project.

103Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; What is the average count of new identities added annually?

103A. ~3,000

104Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; How many directories are in scope for synchronization?

104A. Currently we sync our ERP to local AD to Microsoft Entra. We are open to changing

105Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; What is the current MFA solution?

105A. Microsoft Entra ID

106Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; What is the current SSO solution?

106A. Microsoft Entra ID

107Q. IDENTITY AND ACCESS MANAGEMENT IMPLEMENTATION; What is the current SIEM solution?

107A. Splunk

108Q. (C) DATA WAREHOUSE IMPLEMENTATION Please provide additional details around data sources and volume details to be integrated into the EDW.

108A. There are four primary enterprise systems that will need to be integrated into the warehouse: HCM, Finance, Academics, and Identity.

109Q. (C) DATA WAREHOUSE IMPLEMENTATION Please provide additional details around the user base, audience and number of users for this EDW.

109A. The user audience will be general purpose data needs across divisions, reporting needs for State and Federal entities, projections, trends, and current state for Leadership.

110Q. If this solicitation is not of goods but for services what should vendors answer in section 3. United States Product of Attachment B?

110A. See #49 above.

111Q. Could CSU please clarify if section 3. United States Product of Attachment B is applicable to this solicitation?

111A. See #49 above.

112Q. Is it mandatory for vendors to have experience in institutions of higher education

112A. Experience in institutions of higher education is preferred but not mandatory. Vendors without direct higher education experience should demonstrate how their expertise in similar industries aligns with the unique needs, challenges, and regulatory requirements of a university environment. Proposals should include

relevant case studies or examples that illustrate the applicability of the vendor's solutions to higher education operations.

113Q. Are commercial references allowed?

113A. Higher education references are preferred. However, commercial references are allowed, provided they clearly demonstrate the vendor's ability to deliver solutions with similar scope, complexity, and functional requirements applicable to a higher education environment. Vendors should outline how their experience in non-higher education sectors translates to the needs of a university setting.

114Q. Are references from ongoing contracts accepted?

114A. CSU will review references from ongoing contracts, provided that vendors can demonstrate substantial evidence of the project's duration, progress, and impact. Vendors should include key milestones, deliverables completed to date, and client endorsements that reflect the project's success and relevance to CSU's objectives.

115Q. Could CSU please clarify what Attachments should vendors add in the proposal?

115A. Vendors should include the following attachments in their proposal submission:

Company Information & Compliance Documents:

- Completed and signed Proposal Submission Form
- Proof of business registration and relevant certifications
- Statement of compliance with CSU's terms and conditions

Project-Specific Documentation:

- Case studies or reference projects (preferably in higher education):
- Client reference letters or contact details
- Resumes of key personnel assigned to the project
- Implementation methodology and project timeline

Technical & Functional Responses:

- Responses to CSU's functional and technical requirements
- Diagrams or system architecture (if applicable)
- Security and compliance documentation (SOC 2, ISO 27001, etc.)

Financial & Pricing Information:

- Detailed pricing breakdown and cost structure
- Any optional or alternative pricing models

Additional Supporting Documents (if applicable):

- Whitepapers, product brochures, or additional relevant materials
- Vendor partnerships or third-party integration details
- Vendors are encouraged to include any additional attachments that support their proposal and align with CSU's objectives.

116Q. Will any third-party vendors or partners need to comply with the regulations

mentioned in section v. Compliance as well?

116A. FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited

117Q. Are all the listed regulations (GDPR, HIPAA, FERPA, CCPA, NIST) mandatory for this project, or are some just recommended guidelines?

117A. FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited

118Q. In case vendors don't have any of the GDPR, HIPAA, FERPA, CCPA and NIST would that disqualify the vendor?

118A. The answer depends on what data is being accessed. FERPA is a requirement in almost all scenarios:

FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited"

119Q. Could CSU please clarify if compliance with GDPR, HIPAA, FERPA, CCPA and NIST has to be at the time of submission, or can it be post award?

119A. The answer depends on what data is being accessed. FERPA is a requirement in almost all scenarios:

FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited"

120Q. Could CSU please clarify if vendors can have only GDPR, HIPAA, FERPA, CCPA and NIST or is it mandatory to have all of them?

120A. The answer depends on what data is being accessed. FERPA is a requirement in almost all scenarios:

FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited"

121Q. Could CSU please clarify how should vendors present their proposed pricing?

121A. We recommend vendors present their proposed pricing in a structured and transparent manner that supports CSU's strategic approach to software selection. We recommend the pricing model provide flexibility, allowing CSU to scale and adapt its investment in alignment with institutional needs while maintaining cost-effectiveness. We recommend the proposal to include the following key components:

1. Executive Summary of Pricing Proposal

- Provide a high-level overview of the proposed pricing structure, outlining key cost components and assumptions.
- Highlight available pricing models, including subscription-based, perpetual licensing, or usage-based pricing.
- Identify any cost-saving opportunities, such as higher education discounts, volume-based pricing, or multi-year commitments.

2. Detailed Software Licensing Cost Breakdown

- Core Software Pricing
 - Clearly define licensing models (e.g., per user, per module, enterprise-wide).
 - Specify pricing for mandatory core modules and optional add-ons.
 - Indicate any minimum purchase requirements or scaling flexibility.
- Hosting & Deployment (If Cloud-Based)
 - Define SaaS subscription fees (if applicable).
 - Specify whether the pricing includes hosting or if CSU must procure separate hosting.
- Ongoing Software Maintenance & Updates
 - Outline costs associated with software updates, patches, and future enhancements.
 - Provide details on whether major upgrades are included or require additional costs.

3. Pricing Assumptions & Terms

- Define licensing dependencies, potential cost escalations, and renewal terms.
- Clarify flexibility in licensing adjustments to accommodate changing user counts or functionality needs.
- Outline any third-party costs or required integrations that may impact pricing.

4. Alternative Pricing Models (Encouraged)

- Vendors are encouraged to provide:
 - Flexible pricing structures (e.g., tiered pricing, modular add-ons).
 - Options for phased adoption without requiring an upfront enterprise-wide commitment.
 - Pilot or proof-of-concept pricing models to validate software capabilities before CSU enters a long-term agreement.

5. Total Cost of Ownership (TCO) Considerations

- Provide a multi-year cost projection (e.g., 3- to 5-year outlook).

- Identify potential cost fluctuations over time, such as renewal fees or feature expansions.
- Highlight any pricing structures that allow CSU to remain financially strategic in its software investment.

6. Payment Structure & Terms

- Define renewal terms, cancellation policies, and cost implications of contract termination.
- Indicate if payment models are annual, multi-year, or milestone-based.

122Q. In case there is not enough space for the proposed pricing in Attachment G, could vendors add additional pages to the attachment?

122A. Yes

123Q. Is there a tentative budget assigned for the resultant contract?

123A. CSU has not set a fixed budget for these projects, as the allocated budget will depend on the proposals received. This RFP is part of a larger Technology Transformation Initiative that CSU is undertaking. Our goal is to find the best solution that enables the university to effectively meet the needs of students, faculty, staff, alumni, and community members.

We encourage vendors to propose scalable and cost-effective solutions, outlining pricing structures that consider various implementation approaches, including tiered, phased, or incremental rollouts. Vendors may provide total cost of ownership (TCO) considerations and long-term sustainability factors to support CSU's decision-making process

124Q. Will CSU favor firms that provide higher education experience and references?

124A. Yes

125Q. Will CSU favor firms that can provide all three projects?

125A. No

126Q. Was the proof of concept of the data warehouse built internally by CSU or was it done by an external vendor?

126A. The POC was created in collaboration with input from peer institutions and Microsoft.

127Q. Under Proposal Submission Requirements point d is for the Pricing Proposal. Are firms required to insert Attachment G under this section?

127A. If your pricing is in your proposal then you do not need Attachment G.

128Q. In Attachment A it states "The following submittals must be included in the Proposal package by the RFP due date/time. Failure to do so may disqualify the

Proposal." Are firms required to include attachments that are purely informative in their proposal (for example Attachment E and Attachment H)?

128A. No. Just your proposal and the sections requiring signatures and references.

129Q. For the Proposal Submission requirements under Project C, is CSU looking to see these items in one document or divided into the attachment sections listed in Attachment A?

129A. If you identify the responsive information in your proposal with reference to the sections, you do not need to divide the response.

130Q. Could CSU kindly provide clarity on the proposal submission format?

130A. CSU prefers proposals to be submitted in PDF format to ensure document integrity and consistency. However, CSU will accept multiple formats, including Word documents, if necessary. Vendors should ensure that all attachments and required documents are clearly labeled and formatted for ease of review.

131Q. For the Proposal Submission requirements under Project C for point e, are the vendor references requested the same that firms have to provide in Attachment D?

131A. Yes, references may be the same across multiple projects. However, vendors submitting proposals for more than one project must ensure that they provide relevant references for each project, demonstrating experience specific to the scope and requirements of each respective project.

132Q. For the Proposal Submission requirements under Project C for point e, can firms provide case studies to suffice this point (without contact reference information)?

132A. No, case studies alone will not suffice for this requirement. Firms must provide reference information, including contact details, for verification purposes. While case studies may be included as supplemental materials to demonstrate relevant experience, CSU requires direct references to ensure transparency and the ability to validate the scope, outcomes, and applicability of the projects cited.

133Q. Does CSU have any preference for the scenarios provided for Project C?

133A. CSU does not have a predetermined preference for the scenarios provided for Project C. However, the university seeks solutions and strategies that prioritize scalability, cost efficiency, operational effectiveness, and alignment with industry best practices.

Vendors should present well-defined approaches, detailing the benefits and potential risks associated with each scenario. Proposals should include implementation strategies, projected timelines, resource requirements, and any cost-saving measures. CSU encourages vendors to highlight how their proposed solutions will support long-term sustainability, improve user experience, and integrate seamlessly with CSU's broader technology transformation efforts.

134Q. For the Proposal Submission requirements under Project C for point e, it

states "Higher education clients with similar projects." Could CSU please clarify if firms can provide similar projects that are not from higher education sector?

134A. Yes, firms may provide examples of similar projects outside the higher education sector. However, if a firm does not have direct experience with higher education clients, they must clearly demonstrate how the project aligns with the needs, complexities, and operational requirements of a higher education environment. This should include an explanation of how the methodologies, challenges, and solutions applied in the project are transferable to a university setting.

135Q. Can you provide details on CSU's current data warehouse environment, including existing technologies, architecture, and challenges?

135A. The university does not currently have a formal data warehouse solution.

136Q. Can you provide details on size of data in data sources and their type (structured, unstructured)?

136A. There are four primary enterprise systems that will need to be integrated into the warehouse. HCM, Finance, Academics, and Identity. These are database systems with structured data.

137Q. Can you provide clarity where data sources are hosted (Cloud, On-Premise)?

137A. There are a mixture of sources both on prem and cloud based.

138Q. What are the key performance and scalability requirements for the new data warehouse?

138A. The primary performance target would be a minimum of daily refresh. The architecture and implementation should scale beyond the four primary subject areas.

139Q. Are there specific Microsoft Fabric components (e.g., Data Factory, Lakehouse, Warehouse) that CSU prefers for the architecture?

139A. The university has worked with Microsoft and peer institutions to create a medallion architecture in Fabric, using combinations of lakehouses, warehouses, notebooks and pipelines.

140Q. Does CSU have any existing ETL/ELT tools, or should the vendor recommend new tools for data ingestion and transformation?

140A. The university does not currently have a formal data warehouse solution and remains open to recommendations on etl approach

141Q. Are there existing on-premises systems that need to be integrated into Microsoft Fabric, or is everything already cloud-based?

141A. There are a mixture of sources both on prem and cloud based.

142Q. What are the primary data use cases CSU envisions for the new data warehouse?

142A. The user cases will cover general purpose data needs across divisions, reporting needs for State and Federal entities, projections, trends, and current state for Leadership.

143Q. How many stakeholder groups will be involved in defining use cases, and what are their expectations for reporting and analytics?

143A. The primary focus of the data warehouse will be four large enterprise systems: HCM, Finance, Academics, and Identity.

144Q. Does CSU have a roadmap for implementation, or should the vendor propose one?

144A. The organization is looking for a roadmap and implementation

145Q. What data governance practices and policies are currently in place at CSU?

145A. Governance and Security and managed through the ERP and approval processes with data stewards

146Q. Are there specific data governance tools CSU prefers to implement alongside Microsoft Fabric?

146A. The university is interested in recommendations and has engaged Microsoft for discussions on the use of Purview

147Q. How does CSU currently manage data stewardship, ownership, and access policies?

147A. Governance and Security and managed through the ERP and approval processes with data stewards

148Q. Are there compliance requirements beyond FERPA, HIPAA, and GDPR that the solution must adhere to?

148A. The answer depends on what data is being accessed. FERPA is a requirement in almost all scenarios:

FERPA: Yes to both vendor and third-party depending on data that is being accessed

HIPAA: Yes, if handling PHI

GDPR: Yes, if processing EU residents' data in specific contexts.

CCPA: No

NIST: Not a requirement, but please describe what security framework is being used and audited

149Q. What ERP system is CSU currently using, and is there an existing migration or upgrade plan?

149A. We currently utilize Oracle PeopleSoft as our ERP system. As part of CSU's ongoing commitment to modernizing its administrative and academic operations, the university is seeking proposals from qualified vendors to select a modern ERP

software solution. The objective of this initiative is to enhance operational efficiency, improve user experience, and position CSU for a competitive advantage in the higher education sector.

CSU has initiated a strategic evaluation of potential ERP solutions and intends to transition to a system that aligns with best practices, scalability, and long-term sustainability. This modernization effort is a critical component of CSU's technology transformation strategy, ensuring alignment with institutional goals and industry standards. The selected vendor will play a key role in shaping this transition in coordination with CSU's leadership and stakeholders.

150Q. Does CSU require real-time or batch-based data integration with the ERP?

150A. There are no use cases for real time data ingestion or processing at this time.

151Q. What other enterprise applications (CRM, LMS, HR systems) must be integrated with the data warehouse?

151A. There are four primary enterprise systems that will need to be integrated into the warehouse. HCM, Finance, Academics, and Identity. These are database systems with structured data.

152Q. What AI-driven use cases does CSU aim to enable with the data warehouse?

152A. The university would be interested in projects, prediction, classification, and analysis.

153Q. Does CSU have existing AI models or plans for AI adoption in data analytics?

153A. The university does not currently have AI models used in analytics and is seeking recommendations

154Q. How does CSU define the scope of knowledge graphs and RAG techniques for this project?

154A. Knowledge graphs used for RAG processing would be limited to the primary subject areas being ingested into the warehouse: HCM, Finance, Academics, and Identity.

155Q. Are there any ethical or policy considerations CSU wants to establish around AI usage in higher education?

155A. The university does not currently have an AI policy

156Q. What reporting and analytics tools are currently in use at CSU (e.g., Power BI, Tableau)?

156A. The university uses a mixture of files, dashboards in SharePoint, PowerBI, Tableau, excel.

157Q. Does CSU have existing Power BI governance policies, including dataset

certification, workspace management, and user access?

157A. The university is seeking recommendations for governance

158Q. Are there specific real-time data needs, or will most reporting be batch-based?

158A. There are no use cases for real time data ingestion or processing at this time.

159Q. What level of self-service analytics does CSU envision, and what training is expected for end users?

159A. Self-service would be available through published models to the workspaces in Fabric. The extent of Self -Service needs and uses cases has not been defined and we are looking for recommendations

160Q. What internal technical capabilities does CSU currently have for maintaining and enhancing the data warehouse?

160A. The university does not currently have a formal data warehouse solution and remains open to recommendations on etl approach

161Q. Is CSU looking for long-term vendor support, or does it plan to transition full ownership to internal teams?

161A. The university would transition support to internal teams and full ownership

162Q. What is the expected timeline for training internal IS&T teams and functional users?

162A. The university does not currently have a formal data warehouse solution and remains open to recommendations on etl approach

163Q. Are there existing centers of excellence (CoE) or communities of practice (CoP) that will oversee data governance and analytics?

163A. The university is looking for recommendations to establish a data governance model.

164Q. What are CSU's key risks and concerns regarding data migration and implementation?

164A. Risks and concerns would be volume of data, data protection requirements (FERPA, HIPAA), and data access.

165Q. Are there any legacy systems or data sources with high complexity or known integration challenges?

165A. There are several legacy systems that would act as source with high levels of complexity and known integration challenges.

166Q. What are CSU's expectations for post-implementation support and

maintenance?

166A. The university would transition support to internal teams and full ownership

167Q. Can CSU provide more clarity on budget and timeline for Project C?

167A. The university is seeking proposals that would include timelines and costs.