



**REQUEST FOR PROPOSAL (“RFP”) #5049ME
FOR: WORKDAY SYSTEM INTEGRATOR SERVICES
AS PER THE SPECIFICATIONS LISTED HEREIN**

RFP Issued Date: June 5, 2025

ADDENDUM #2, Questions and Answers

Questions due by: June 12, 2025 by 2:00pm EDT via email with the RFP #5049ME in the subject line

Proposal Due Date /Time: July 1, 2025 by 2:00pm EDT via email with the RFP #5049ME in the subject line

Contact:

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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 #2, Questions and Answers, RFP #5049ME, For: Workday System Integrator Services As Per The Specifications Listed Herein

1. After spending several days on Workday demos, how significant would you say the change will be to implementing Workday as delivered?

Implementing Workday as delivered represents a significant transformation for CSU. The shift from a highly customized PeopleSoft environment to Workday's standardized, cloud-based platform will require substantial changes in business processes, user experience, and organizational mindset. This shift is guided by a Workday First strategy, where CSU is committed to adopting delivered functionality and aligning processes to Workday's best practices wherever feasible. The change is not just technical—it is cultural and operational, and CSU is prepared to embrace it as a university-wide initiative.

2. What is your commitment to Workday as delivered versus the customization you have today in your PeopleSoft environments?

CSU is strongly committed to a Workday First approach—adopting delivered functionality and minimizing customizations. The University views this implementation as an opportunity to eliminate legacy complexity and align with modern, scalable practices. While CSU acknowledges that some unique institutional needs may require configuration or selective extensions, the guiding principle is to avoid customization unless it provides critical differentiation. This approach supports CSU's goals of reducing complexity, lowering maintenance costs, and ensuring smoother upgrades and long-term sustainability.

3. Can you explain the factors/risks that led you to align to an 18-month deployment of the Phase 1 solution?

The 18-month deployment timeline for Phase 1 (HCM and Financials) was selected based on several key factors:

- Resource Constraints: CSU is currently experiencing staffing shortages due to retirements and voluntary separations.

- Lessons from Peer Institutions: Accelerated timelines at other universities often led to incomplete deployments or the need for phased go-lives.
- Desire for Full Go-Live: CSU is committed to a comprehensive go-live for all Phase 1 modules, avoiding partial or rolling implementations.
- Concurrent Initiatives: CSU is also managing other major projects, including a data warehouse and identity/access management overhaul, which require careful coordination.

This timeline balances urgency with realism, ensuring quality and stakeholder readiness.

4a. Customer Receivables – can you describe your need for and quantify the activity specific to non-student receivables (i.e., room rentals, camps, etc.)?

CSU manages a variety of non-student receivables, including but not limited to:

- Facility and room rentals
- Summer camps and continuing education programs
- Conference Services
- Auxiliary services (e.g., parking, housing)
- Sponsored research and grants
- Athletic Sponsorship
- Confirmation of Service

While exact transaction volumes are still being finalized, CSU anticipates a moderate volume of non-student receivables that must be tracked, billed, and reconciled. These activities are currently handled through a combination of PeopleSoft and third-party tools, and CSU expects Workday to consolidate and streamline these processes.

4b. Endowments – can you describe and quantify the Endowments activity and your expectations for using the Workday delivered endowments functionality or will you keep this outside of the solution?

CSU's endowment accounting is currently managed outside of PeopleSoft using MIP Fund Accounting, which supports the financial operations of the CSU Foundation. The goal is to assess whether Workday can provide support for compliance, transparency, and integration with other financial processes. CSU recognizes that endowment management

has unique requirements and will rely on the implementation partner to work with CSU and the CSU Foundation to evaluate Workday's capabilities, compare them to MIP, and help guide a decision on whether to transition or retain the current system and integrate with it.

5. Attachment F references Financial Planning. Can you describe the current budgeting cycles and the timing for elements such as Board approval of the budget?

CSU operates on a fiscal year from July 1 to June 30 and prepares an annual All Funds Budget, which includes the Operating Budget, General Fee Budget, and Auxiliary Enterprises Budget (e.g., Dining, Parking, Bookstore, and the Wolstein Center). The budgeting process is driven by strategic themes set by the President and senior leadership, projected revenues (including tuition and state appropriations), and prior-year expenditures.

Budget development involves input from Deans and Vice Presidents, who submit strategic initiative requests. These are reviewed and prioritized through a collaborative process involving the Office of Budgets and Financial Planning, the Provost, CFO, and the President's Senior Leadership Team. Final budget recommendations are presented to the Board of Trustees for approval in late spring to early summer, in advance of the new fiscal year.

CSU expects the implementation partner to help align Workday Financial Planning tools with this structured and collaborative process, ensuring support for scenario modeling, transparency, and timely decision-making.

6. Phase 1 suggests the implementation of Performance Management. Can you give us some insight regarding your processes for performance reviews? Annual? Anniversary date? Etc.

CSU currently uses a hybrid approach to performance reviews. Some employee groups follow an annual review cycle, while others are reviewed based on their employment anniversary, as outlined in union contracts. This structure is expected to remain in place. CSU plans to leverage Workday's Performance Management functionality to support both review types, ensuring compliance with contractual obligations while improving process efficiency, transparency, and reporting. The implementation partner will be expected to configure the system to accommodate these varying cycles.

7. Phase 1 suggests Learning Management. Can you describe the current learning offerings from CSU in terms of content? Is it third party, or custom developed in-house? Is your vision to move all Learning into Workday or will you continue with a third-party content provider?

CSU currently uses Vector Solutions for employee training and compliance-related learning, which is expected to be sunset. Learning content includes a mix of third-party modules (e.g., compliance, safety) and internally developed training. The University's vision is to consolidate learning management within Workday where feasible, leveraging Workday Learning for delivery, tracking, and reporting. However, CSU may continue to use select third-party content providers if they offer specialized or accredited content not available through Workday.

8. Phase 1 for Financials includes Billing. Can you describe and quantify the requirements/transactions that will be covered as part of Billing?

Billing requirements in Phase 1 will focus on non-student billing activities, including:

- Room and facility rentals
- Auxiliary services (e.g., parking, housing)
- Sponsored research and grants
- Continuing education and camps
- Athletic Sponsorship
- Confirmation of Service
- Conference Services

While CSU does not yet have finalized transaction volumes, the expectation is that Workday Billing will replace current PeopleSoft functionality and integrate with retained systems like Transact Payments. The implementation partner will be expected to help define billing use cases, configure billing rules, and ensure accurate integration with receivables and financial reporting.

9. As you look to deprecate various 3rd party solutions, are there any impacts based on the current expiration dates of the software (i.e., PeopleSoft) that will affect the proposed timeline?

CSU does not anticipate that software expiration dates will impact the proposed timeline. The University's focus is on a Workday First strategy—prioritizing the adoption of Workday's delivered functionality wherever feasible. Rather than being driven by contract expirations, CSU is committed to evaluating each third-party system to determine whether it provides critical differentiation. Systems that do not offer strategic value will be targeted for sunset. The implementation partner will play a key role in helping CSU assess functionality, manage transitions, and build buy-in across affected departments.

10. Would CSU entertain the option of the vendor supplying certain backfill resources in order to allow the CSU team to focus on Workday rather than supporting the legacy solutions?

Yes, CSU is open to the vendor providing backfill resources. Given current staffing constraints and the need to maintain legacy systems during the transition, backfill support is seen as a valuable strategy to ensure the internal team can focus on the Workday implementation. CSU encourages vendors to propose flexible staffing models that include backfill options, particularly in high-impact areas such as HR, Finance, and IT.

11. Can you describe your position/expectations on the use of off-shore resources?

CSU expects that all services provided under this engagement comply with applicable state and federal regulations, including Ohio Executive Order 2019-12D, which restricts the use of offshore resources for state-funded projects. While CSU is open to global delivery models that include nearshore or remote U.S.-based resources, any use of offshore personnel must be disclosed and approved in advance. Data security, compliance, and communication effectiveness are top priorities, and CSU will require vendors to complete the State of Ohio's Affirmation and Disclosure Form regarding offshore services.

12. Being that you have a highly customized environment today, what is your vision moving forward in terms of transformation and eliminating customizations?

CSU's vision is rooted in a Workday First philosophy—prioritizing delivered functionality and eliminating customizations unless they provide critical differentiation. The University recognizes that its current PeopleSoft environment includes extensive customizations that have created technical debt and limited agility. Moving forward, CSU is committed to aligning business processes with Workday's native capabilities and leveraging configuration over customization. The implementation partner will be expected to help CSU evaluate legacy processes, identify opportunities for simplification, and guide the institution through this transformation.

*13. In Attachment F (p.18), CSU states that the vendor shall “Lead Deployment and Post-Production activities, including: *Post-Production Data Conversion, *Post-Production Support, *End-user training.” Using the timeline as reference, Post-Implementation includes Hypercare (Jul–Sep), Stabilize (Oct–Dec) and Operate (Jan–Mar). Does CSU expect Post-Production Support to cover all phases of the Post-Implementation phase, or only specific stages (e.g., Hypercare only)?*

CSU expects Post-Production Support to cover all three phases of the post-implementation period: Hypercare, Stabilize, and Operate. The University views this extended support as essential to ensuring a smooth transition, resolving issues promptly, and building internal capacity. Vendors should propose a support model that includes knowledge transfer, issue resolution, and performance monitoring throughout the entire post-go-live period.

14. Has the CSU team begun discussions around Proposer Presentation dates? Understanding this may not be defined at this point, is there a month(s) that have been identified and blocked off?

While specific dates have not yet been finalized, CSU anticipates that proposer presentations will occur after the July 1, 2025, proposal deadline, likely in mid-to-late July 2025. Vendors are encouraged to keep this window available for potential scheduling. CSU will provide formal invitations and scheduling details once proposals have been reviewed.

15. What areas of the institution that will be involved with the project are facing a resource shortage (e.g., Registrar's Office)?

All key administrative areas at CSU—including Human Resources, Finance, IT, and the Registrar's Office—have been impacted by staffing shortages due to a wave of retirements and voluntary separations. These constraints are a major consideration in CSU's implementation planning. To ensure project success, CSU expects the selected systems integrator to provide a comprehensive staffing plan that outlines both CSU and vendor roles, identifies critical gaps, and recommends backfill or supplemental resources as needed. This collaborative approach will help CSU maintain operations while focusing on transformation.

16. Does CSU have any indication as to which term they are wanting to go live for? According to the timeline provided it appears they are wanting to go Winter 2030?

CSU is targeting a full go-live for Academic Year 2029–2030, with students registering in Workday for Fall 2029. This aligns with the phased approach outlined in the RFP, where HCM and Financials are implemented first, followed by Workday Student. The timeline was developed during CSU's Technology Transformation Roadmap Project with Deloitte, using Workday as the selected system. Deloitte advised that this schedule provides sufficient time for planning, configuration, testing, and change management—even when accounting for CSU's current resource constraints and concurrent initiatives.

17. Is the desired state to use Workday for financial aid processing, or continue to use PowerFAIDS?

CSU's desired state is to adopt a Workday First approach, including for financial aid processing. While PowerFAIDS is currently in use, CSU intends to evaluate Workday Student's financial aid capabilities to determine whether they can fully support institutional needs. The overarching goal is to sunset systems that do not offer critical differentiation. CSU will rely on the implementation partner to help assess functionality, guide the transition, and support stakeholder engagement to ensure a successful shift where appropriate.

18. Is the desired state to use Workday for advising and academic plans, or continue to use Starfish and Stellic?

CSU is committed to a Workday First strategy and will evaluate Workday Student's advising and academic planning capabilities as part of Phase 2. While Starfish and Stellic are currently in use, the goal is to sunset systems that do not provide strategic or differentiating value. CSU will depend on the implementation partner to help assess whether Workday can meet advising needs and to support the change management process required to transition from existing tools.

19. Do the current test scores (ACT, ALEKS, GMAT, GRE, SAT, TOEFL) load directly into Slate and then pass over to the SIS, or do they load directly to the SIS? Or a mix of both?

Currently, CSU uses a mix of both approaches. Some test scores (ACT, SAT, TOEFL) are loaded directly into Slate, which then passes the data to the Student Information System (PeopleSoft). Others are loaded directly into PeopleSoft (AP, ALEKS, GMAT/GMAC). The exact flow varies by test type and source. As part of the Workday Student implementation, CSU expects to streamline and standardize these data flows, and will rely on the implementation partner to help design efficient, integrated processes.

20. Will Help and Journey SKUs be for both Platform and Student?

At this time, CSU has licensed Workday Help and Workday Journeys for the Platform implementation only (HCM and Financials). These tools are considered essential for supporting change management and user adoption during Phase 1. CSU has not yet licensed these SKUs for the Student implementation. However, the University is open to evaluating their value for Workday Student and requests that the vendor provide separate pricing as an add-on should CSU decide to extend Help and Journeys to the Student phase in the future.

21. What internal change management, communications and training capabilities/resources does CSU have or expect to have for this project?

CSU recognizes that change management is critical to the success of this transformation. While the University has begun building internal capacity—including recruiting staff with ERP cloud experience and establishing a cross-functional governance structure—additional support will be needed. CSU expects the systems integrator to provide a detailed staffing and support plan that includes change management, communications, and training resources. This plan should identify roles and responsibilities, recommend staffing levels, and outline how the SI will guide CSU through stakeholder engagement, adoption planning, and end-user readiness.

22. We heard the desire to consolidate or reduce as many applications as possible. Slate is an application you are looking to keep in place. Is PowerFAIDS an application you plan to retire or keep in place?

CSU's overarching strategy is Workday First—to consolidate functionality into Workday and retire third-party systems that do not offer critical differentiation. While Slate is expected to be retained due to its strategic role in admissions and advancement, PowerFAIDS is under review. CSU will evaluate whether Workday Student's financial aid functionality can meet institutional requirements. The implementation partner will be instrumental in conducting this evaluation and helping CSU build consensus among stakeholders to support system transitions where appropriate.

23. Our understanding is CSU has selected Workday as the software provider for this RFP. What is the intended "Software Selection" activity identified in February 2026 (indicated on the timeline)?

CSU is moving forward with Workday as the enterprise platform for this transformation initiative, as indicated by the RFP. The reference to "Software Selection" in February 2026 on the timeline originates from CSU's Technology Transformation Roadmap Project, completed with Deloitte in late 2024. That timeline was developed prior to the release of the RFP to select a software and was included in the RFP to provide consistency across vendor responses. The February 2026 milestone is now considered a placeholder and does not reflect a pending software decision.

