

RFI College Operations Software for College of Southern Idaho

Last Updated: 1/17/2020

Question	RFI Section	Question	Answer
1	General	Will vendors have the opportunity to present demonstrations at CSI during the RFI timeframe?	No – demonstrations are not part of the RFI process.
2	General	Will a RFP follow the RFI process?	Yes – CSI will be releasing a RFP in the February/March 2020 timeframe
3	General	Will vendors have the opportunity to present demonstrations at CSI during the RFP timeframe?	Yes – vendors will have opportunity to present demonstrations at CSI during the CSI RFP evaluation period, estimated to be in the March/April 2020 timeframe.
4	General	Regarding CRM, how many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher level functions) do you anticipate will access the solution?	We estimate about 100. CRM will be a new functionality for us, and thus we are unable to provide a specific number at this time.
5	General	Regarding CRM, how many limited access users (only able to update contact data fields, add notes, and run pre-written reports) do you anticipate will access the solution?	We estimate about 200. CRM will be a new functionality for us, and thus we are unable to provide a specific number at this time.
6	General	Do you expect to use the chat feature? If so, how many chat users do you anticipate will access the solution?	Yes, but we don't know how quickly we would want to use chat. We would estimate about 50, but this number could change.
7	General	How many student applications do you receive annually?	Estimate is about 17,500 applications annually.
8	General	Regarding Finance/HR/Payroll, how many full access users (able to configure the system, update settings/workflows, perform accounting and finance back office tasks (AP, AR, GL, process transactions, generate financials), write reports, approve and manage budgets, and other higher level functions) do you anticipate will access the solution?	Estimate is about 20 full access users.
9	General	Regarding Finance/HR/Payroll, how many limited access users (only able to view pay stubs/W-2s, view and select benefits, update personal information (address, demographic info), submit and approve timecards and expense reports, submit budget and purchasing requests) do you anticipate will access the solution?	Estimate is about 1800 limited access users.
10	General	Can you provide CSI's Student FTE? (IPEDS lists 4006 – is this accurate?)	The number of student FTEs is about 4000.
11	General	Can you provide CSI's Non-Title IV Annual Instructional Hours?	We estimate 7,400 unique students take around 14,000 course registrations annually.
12	General	Can you provide CSI's Employee Headcount? (IPEDS lists 898 total staff, 560 full time, 338 part time – is this accurate?)	These numbers are fairly accurate, as numbers shift some each semester.

13	11.2.1.11	Can you please give us more detail on what type of information you are looking for regarding Financial Planning? We are assuming investment portfolio management, but want to ensure we are providing CSI with the information that is desired.	<i>It does include some investment management - we have numerous CD's and also our investment pool that we track, so if their product would allow us to manage those types of items it would be great.</i>
14	11.4.1.10	Can you please give us more detail on the type of information you are looking for regarding Enterprise Service Management?	CSI has achieved tremendous success by adopting IT Service Management for all aspects of its campus IT operations. CSI is in the process of expanding service management capabilities beyond IT into other core operational functions including Human Resources, Institutional Research, Facilities, Payroll, Student Services, and other areas conducive to a consumer/provider service model. NOTE: When service management activities are provided outside of IT operations, this is typically referred to as "Enterprise Service Management". For the purpose of the RFI, CSI is requesting information about ways the solution aligns with ESM capabilities (e.g., Self-Service, Catalog Items, Service Requests, Service Level Agreements, Ticket Management), either inherent to the solution product(s) or via integration with external solutions specifically categorized as ESM solutions.
15	11.3.1.8	The requirement states "Provides the ability to handle all admission applications for multiple campuses and student types." So that we better understand how to respond to the above requirement, could you please share with us the similarity or difference in recruiting styles between the different campuses and student types that you are referring to here?	CSI seeks the ability to support applications from multiple student types, including traditional freshmen, transfer students, dual credit (concurrent enrollment) high school students, international students, non-credit-bearing applications, non-degree-seeking applications, apprenticeships, and personal enrichment courses (e.g., glass blowing, sewing). Currently, applications are delivered, managed, and processed through separate technologies and extensive manual processing. This creates multiple challenges with data management, identity management, and continuity of services due to diversity and complexity of how to apply for programs. CSI seeks to simplify the user experience, consolidate and standardize its business processes, and leverage data integration to ensure data integrity. For example, the ability to build interdependent questions like, "Will you be a high school graduate when you enroll at CSI?" If yes, ask for the high school name, graduation date and current grade level. CSI does not currently offer campus-specific applications, but there are different types of applications for programs such as our Workforce Development team.

16	General	Is there an anticipated decision timeline for the subsequent RFP?	If/When CSI decides to initiate a Request For Proposal (RFP), it is possible that this step could begin as early as March 2020 with an anticipated closing date of late Spring 2020. However, timing will largely depend upon the substance and number of responses submitted during the Request For Information (RFI) process.
17	General	Is there a target go-live date?	If/When CSI makes a decision to pursue a modernization solution for its campus operations, a target go-live for implementation would be determined in partnership with the solution provider (or implementation partner where applicable). It is realistic that CSI's funding, personnel, and project resources could be in place to initiate the first phases of a project Fall 2020. However, due to the scope of work involved in this project, it is expected the effort will endure over multiple months beyond 2020.
18	General	In an effort to implement a more sustainable, out of the box solution, with fewer customizations, are your departments open to transforming some of the business processes across campus to match some solution capabilities?	CSI recognizes and welcomes the opportunity to change, improve, and optimize internal business processes to ensure successful transformation of its operations and more effectively leverage the capabilities that come with a modern solution architecture.
19	General	Are you all open to using partners and API integrations for capability extensions without the need for customizations?	CSI desires to leverage a common solution architecture as the means for reducing duplication, decreasing technical complexity, and delivering continuity in the user experience. CSI also recognizes the reality that robust integration may be necessary to meet certain business requirements. However, the desire is to minimize the need for "3rd party" extensions and API integrations as much as possible.
20	General	Do you have a current tech stack? If you do, are you able to provide any specific versions you are using?	CSI's suite of software includes Windows Server, Windows 10, Office 2016, Office 365, Dynamics, PowerBI, Jenzabar EX, Canvas, PowerFails, SharePoint Online, Exchange Online, AdAstra, OnBase, Silkroad Recruiting, and Nintex.
21	General	How many full-time & part-time employees?	Please see question #12.
22	General	How many student workers?	CSI has about 200 student workers.
23	General	Can the College of Southern Idaho provide a tentative implementation timeline, as well as the order for the solutions to be implemented?	Please see question #17.
24	General	Do you currently have a preferred project plan for what sequence you'd like to implement the functional requirements, I.E, Phase 1 ERP (Financials, Procurement, Inventory, Planning/Budgeting...), Phase 2 HCM/HR, Phase 3 - SIS+FA, Phase 4 - CX?	No - we are looking for vendor experience and best practices to help guide CSI.

25	3	Please provide us the total number of students, as well as the number of Part time students and the number of Full time students.	CSI has about 12,600 students - about 2,400 FT and 10,200 PT.
26	3	Please provide us the number of Finance Users/ ERP Financials.	There are about 20-25 direct finance team members, and about 350 who need to view their departmental account.
27	3	Please provide us the number of Planning and Budgeting Users.	About 10
28	11.2.1.4	Please provide us the number of Procurement Users.	About 6
29	11.2.1.3	Please provide us the number of Inventory Mgt users.	About 10
30	11.2.3.5	Is this section specific to faculty and/or staff contract management (for employment) or HR vendor contract management?	Faculty and Staff
31	11.2.3.7	Does CSI have state-provided pension and retirement health coverage that requires administration by the state of Idaho?	CSI has PERSI and ORP retirement plans that are run by either PERSI or TIAA/CREF or Valic. We do not have our retiree health coverage administered by the State of Idaho.
32	11.2.2.1	How are benefits currently administered and managed; e.g., in-house, third-party?	In-house
33	11.2.2.1	How do employees currently manage benefit elections? Can they do so from a mobile device?	Paper form; No
34	11.2.2.2	Are compensation changes performed in an annual (or other recurring) cycle only, or do you have off-cycle increases; e.g., a manager or comp person performs an ad hoc bonus or salary change?	Generally annually
35	11.2.2.2	Are rules enforced with compensation changes; e.g., a compensation increase cannot exceed X percent, or cannot exceed X percent for a particular employee group or classification?	Yes
36	11.2.2.2	Do you use performance ratings to guide compensation allocations?	No
37	11.2.2.2	Do compensation changes require approvals?	Yes - by administration
38	11.2.2.2	Do employees receive Total Compensation Statements?	Yes - once a year
39	11.2.2.3	Who manages your retirement plans; e.g., TIAA?	PERSI, TIAA/CREF or Valic
40	11.2.2.4	Do you plan to process payroll in-house?	Yes
41	11.2.2.4	Do you currently have a self-service payroll/benefits administration portal that allows employees to view and make changes?	Yes, but only for viewing, not editing.
42	11.2.2.5	How many pay cycles does CSI currently have? Please describe your pay cycles.	12 - monthly
43	11.2.2.5	Does CSI have any collective bargaining agreements that affect pay rules, pay calculations, etc.? If so, please describe	No

44	11.2.2.6	Approximately what percent of Payroll department time is spent on manual tasks? Can you give examples of these tasks?	The CSI Payroll department spends about 75% of its time on manual tasks, such as entering "paper" timesheets, adjusting payments, calculating salary and vacation payouts, running reports, and performing data mining with Excel.
45	11.2.2.7	What paycheck features do you require, or would like to have, that your current solution lacks?	Paycheck features need to include: full name, address, check date, employee #, hours, taxes, benefits and deductions, gross pay, net pay and year to date totals. Nice to have features include: time-off balances, filing status and an easily changeable spot for notes to employees
46	11.2.2.7	Do employees have mobile access to their paycheck, payment methods, tax withholding, etc.?	Yes - but actually via a website that was not designed to be mobile friendly.
47	11.2.2.8	What solution(s) do you currently use to manage faculty and employees? What are these solutions unable to do that you want to have from a selected HCM solution?	Jenzabar EX; Two examples would be electronic timesheets and the ability to manage time-off requests electronically.
48	11.3	What is the total number of CRM/CX users? Recruitment/ Student Service.	For CRM, please see other questions related to CRM. For Students Services, less than 100.
49	11.4.1.9	Please elaborate on what features/benefits you would like to see or expectations you have from a proposed solution in the area of Enterprise Service Management.	Please see question #14.