

**RFP: College Operations Software  
for the College of Southern Idaho**

**Last Updated: 6/4/2020**

Question	RFP Section	Question	Answer
1	General	Are the Idaho state budget updates going to impact CSI's decision?	CSI has planned for the expenses related to a project of this size.
2	General	For the Functional Response Spreadsheet there is a column titled "Description of how Functionality is Delivered". We are looking for clarification on how to answer that since the columns before this column involve whether a solution is delivered out of the box or as a custom solution.	<p>CSI prefers that vendors use the column labeled "Description of how Functionality is Delivered" to give a detailed explanation of how their product meets the need of the functionality being requested in column B. The College anticipates that the functionality being requested may require special configuration, customization, or may not be available at this time; columns D, E, F, and G are to be used to indicate this to help the College understand what will be required to achieve the desired functionality.</p> <p>For example, if functionality is not readily available within a product but requires a third-party vendor, the Proposer would mark the appropriate column (D, E, F or G) and indicate in column I, "Special Requirements", what would be required to meet the functional need of the College.</p>
3	General	For the demos, how will the dates be assigned?	Regarding the scheduling of on-campus demos, CSI will identify the top vendor solutions, and then work with specific vendor representatives to schedule a time that works both for the vendor demo team as well as for CSI. Please note that not all vendors will be invited to present on-campus demos.
4	1 - Administrative & Background Info	Can you provide updated milestone dates to the table on page 3?	<p>Deadline To Receive Questions: June 5, 2020, at 5:00 pm MT</p> <p>RFP Closing Date: June 12, 2020, at 2:00 pm MT</p> <p>RFP Response Opening Date: June 12, 2020, at 2:30 pm MT</p> <p>Evaluation Period: June 15 – October 30, 2020</p> <p>Demonstrations: For only invited Offerors, tentatively scheduled for September 8 – October 30, 2020</p> <p>Intent to Award: November 18, 2020</p> <p>Tentative Commencement Date of Contract: December 1, 2020</p>

5	General	<p>Would you add a "Future" response category to the Student (SIS) Category within the RFP to allow for high-level time lines? This could be either CSI adding that column in the RFP or allowing a vendor to add within their response?</p>	<p>Vendors have the option to add a column of info to their RFP response, but this is optional and not required.</p>
6	General	<p>The functional requirements span three major pillars SIS, ERP and CRM. The major, leading cloud-based technology vendors in the market place are putting a lot of R&amp;D into their Student Information System and CRM for Student Recruitment specific functionality - with robust roadmaps for delivery over the coming 12-24 months. Understanding that these new systems will continue to evolve in the next year, would you consider a bid with a foundational phase for assessment / business process harmonization across all pillars and a phase 1 bid for implementation of ERP/HCM (which meets your functional requirements). A phase 2 of SIS and CRM would be contemplated, but not specifically bid upon. Of course we would work with CSI later as the cloud-based software matures to provide fit gap analysis and an eventual bid to implement SIS and CRM.</p>	<p>CSI would prefer that any proposals include an implementation plan that covers all three major pillars: SIS, ERP and CRM.</p>
7	General	<p>Can the RFP Response be submitted digitally and without the hard copy papers and binders?</p>	<p>Yes - via email (25MB size limit per message) or via a flash drive.</p>
8	General	<p>Will CSI still require a flash drive in the RFP response? Our response would be electronically sent and include: the whole response document, the redacted copy with the exempt information blacked out/removed and the list of redacted exempt information.</p>	<p>No - using a flash drive is optional.</p>
9	Appendix	<p>What do you mean by "within the last year from the posting date of this solicitation"? Can you expand on this to clarify?</p>	<p>Any reference should come from a company (or school or agency) that a vendor company has engaged within the last year, and not be a reference from years past.</p>
10	Appendix	<p>The "Nature and scope..." are open for a certain amount of interpretation. This could mean size of the college, Community College, State, Region, etc. What happens if we provide a customer reference who's is just about finished implementing a similar solution to what we're proposing, but they are a 4 - year private college with about 1,100 FTE. The "nature and scope" are very similar, but college demographics are different.</p>	<p>As much as possible, please provide a reference from a community college of similar size (10,000-15,000 students). Including a reference from other businesses or colleges that are not exactly the same size as CSI is ok - CSI would prefer references from Community Colleges similar in size to CSI.</p>

11	Section 5: Advising. 5.4	Can you provide additional info about: Automatic clearance from degree audit and academic program requirements by both individual student and in batches.	This request is for the system to assist with removing registration holds and granting registration clearance for students automatically, individually or in a batch. The current process is cumbersome and must be done for every student prior to their being able to register for the upcoming semester. Currently this is a manual process that requires academic advisors to look up students by name or ID number and remove holds manually for every student. It is hoped that the solution would automate this process or make it easier.
12	Section 6.1	Can you provide additional info about: Academic & Enrollment Management, General. 6.1 Provides the ability to automate the tracking of student information.	CSI wishes to be able to track students by different traits and would like a seamless way to do this. This could be anything from tracking a dual credit or Bridge student to students who use tutoring services.
13	Section 6.44	Can you provide additional info about: Provides the ability to define limitations for course restrictions and time conflicts, and display notifications.	The system should be able to limit course registration based upon different criteria such as declared major, student type (dual credit, traditional degree seeking, workforce development, etc.), or ... The system should warn students clearly of any time conflicts prior to the student attempting to register for the course and display any necessary notifications during the registration process, such as holds that need to be cleared prior to the student being able to register. These notifications should be clear to the student and not an error message that appears after they attempt to register.
14	Section 6.62	Can you provide additional info about: Provides the ability to set registrar-defined limitations for business office approval, accounts receivable status, etc.	CSI would like to be able to place holds on student registration based upon different requirements. Examples include: a student whose account is past due should not be able to register for the upcoming term until the balance is paid, however, the Business Office would have the power to override this hold. Or, if a student has been sent to collections, a hold would be placed on their account until the account has been cleared. A student may not apply for graduation until their account balance has been paid, etc.
15	Section 13.11	Can you provide additional info about: This refers to the system's ability to schedule campus facilities with regards to any and all activities tied to commencement such as: scheduling the CSI gymnasium for the commencement ceremony, or scheduling the Student Union Building for any pre or post commencement such as regalia pick up or graduation reception.	This refers to the system's ability to schedule campus facilities with regards to any and all activities tied to commencement such as: scheduling the CSI gymnasium for the commencement ceremony, or scheduling the Student Union Building for any pre or post commencement such as regalia pick up or graduation reception.

16	Section 16.14	Can you provide additional info about: Includes forms for creating, deleting, storing, and managing financial aid file suites	Ability to create form letters to send to students. Managing scholarship and financial aid files.
17	Section 19.7	Can you provide additional info about: Ability to track usage of available services	This refers to several student services departments wishing to be able to determine if students are using campus resources such as tutoring, counseling, career search help, etc.
18	Section 2.16	Can you provide additional info about: Reporting aids in projecting course capacity needs using information from within the system	This refers to the ability for the solution to help CSI project how many sections of a particular course are needed, the capacity of the classrooms required to offer said courses, and if the classrooms are available.
19	Section 3.13	Can you provide additional info about: System supports an offboarding or archiving process for retention.	CSI would like the ability to somehow off-board, archive, or remove students from its retention module. Currently every student that has ever been referred for retention efforts is still in the system. This means that there are thousands of students in this record and we have no way to cleanly remove them and only view students from the current academic year.
20	General	How many Continuing education/workforce development registrations you get per year?	Please see the data available from the CSI Institutional Effectiveness team: <a href="https://www.csi.edu/_files/pdf/institutional-effectiveness/2019_pmr_report.pdf">https://www.csi.edu/_files/pdf/institutional-effectiveness/2019_pmr_report.pdf</a>
21	Technical Requirements	On the Technical Requirements portion of the RFP there is a question about URI access – what does URI stand for?	URI stands for "Uniform Resource Identifier." A URI identifies the name and location of a file or resource in a uniform format. It includes a string of characters for the filename and may also contain the path to the directory of the file.
22	General	Will you be keeping PowerFAIDS for Financial Aid?	CSI's intention is to reduce as many singular 3rd party applications as possible. This project seeks to move CSI to a standard platform that supports all core campus operations, including all financial aid functions.
23	General	How did the information submitted in the RFI impact the formal proposal process?	The RFI responses helped CSI build the categories and sections of the RFP, gain insight about specific questions needed in the RFP, and better understand several vendor's offerings.

24	Section 6 Scope of Work	The instructions indicate "A narrative response and backup documentation are required for all functional items." The instructions on Appendix C do not reference documentation. Please clarify if documentation is needed and what type of documentation the College is seeking?	Documentation is not required - only a narrative response is required. A vendor may provide documentation on interfacing between 3rd part solutions if needed.
25	General	Is CSI a BBAY school (Borrower Based Academic Year)?	No
26	General	Does CSI use Pell formula 4?	No
27	Appendix G – Terms and Conditions, Item #16	Please clarify whether the Vendor's signature on the face of this solicitation is the authorized signature required in Appendix F.	Yes - the signature required in Appendix F should be for whomever is authorized to agree to the Terms and Conditions in Appendix G. This may be the person submitting the proposal.
28	Appendix E – Cost Proposal	Will CSI consider a Time & Materials contract as an alternative option to firm/fixed?	Yes - CSI will consider Time & Materials as an alternative option to firm/fixed billing.
29	Attachment 1 - SIS Section	Please provide clarification on questions 16.83 and 16.84	Provide the ability to allow attendance to be taken and also provide report features available for attendance.
30	Attachment 1 - SIS Section	Please provide clarification on questions 5.11 as the word "compensate" is confusing.	The solution can help identify the specific semester associated to a particular course, and the system has the ability to manage courses that are sequenced over multiple semesters but may not be offered every semester.
31	Attachment 1 - SIS Section	For question 19.7, please provide examples of the types of available services you would like to track.	Some example services include: Tutoring, Student Disabilities, Gilbert's Pantry, Advising, Student Activity Participation, Graduates and Job Placement, and Career Counseling.
32	Addendum 1	In the Addendum 1, you state that you are not accepting PDFs, only if they are brochures and financials. However, we would also need to submit some PDFs (that need to be in this format, as this is the only one protecting the content from being changed in any form): roadmaps, CSA, General terms etc. Please let me know, if considering the above, we would be able to submit the previously named documents in PDF?	The RFP document itself cannot be in PDF format - however supplemental items can be accepted in PDF format.
33	Section 1.5 - page 6	Will CSI consider responses that focus primarily on CRM?	CSI would prefer proposals from vendors that provide a solution that includes SIS, ERP, and CRM capabilities that are designed to support the higher education industry, specifically two-year community colleges.

34	Section 1.2 - page 4	Does CSI have familiarity or any previous experiences using SaaS technology?	Yes - CSI does currently use cloud-based software.
35	Section 7.4 - page 16	What is CSI's budget for one-time implementation cost vs. recurring licenses fees?	CSI asks that vendors propose their one-time implementation and annual licensing costs.
36	Section 7.3 - page 14	Is there prioritization or order of importance for which of the 3 systems will be implemented first?	CSI would ask each vendor to propose their recommended order of deploying SIS, ERP and CRM features and capabilities.
37	General	Will CSI support awarding multiple vendors?	CSI's intention is to reduce as many singular 3rd party applications as possible. This project seeks to move CSI to a standard platform that supports all core campus operations, including SIS, ERP and CRM capabilities.
38	Section 7.3 - page 14	Does CSI currently have an enterprise integration strategy, including requisite integration platform, ETL tool set, and/or data warehouse?	The current CSI enterprise is based on a Microsoft stack including Windows Server, Active Directory, Azure and a number of server and desktop products and capabilities.
39	Section 7.3 - page 14	Is enterprise integration also a requirement for this RFP?	The current CSI enterprise is based on a Microsoft stack including Windows Server, Active Directory, Azure and a number of server and desktop product and capabilities. A SIS/ERP/CRM solution will need to integrate with the CSI enterprise.
40	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.
41	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.
42	General	How many student applications do you receive annually?	Estimate is about 17,500 applications annually.
43	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.

44	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.
45	General	Can you provide CSI's Student FTE? (IPEDS lists 4006 – is this accurate?)	The number of student FTEs is about 4000.
46	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.
47	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.
48	General	Is there a preference/requirement for solutions that can expand in the future further across campus beyond admissions (e.g. student success, advancement, etc.)?	<p>The solution provides out-of-the-box functionality to support all major types of CSI students including:</p> <ul style="list-style-type: none"> <li>Degree-seeking</li> <li>Non-degree seeking (credit-bearing)</li> <li>Non-degree seeking (non-credit bearing)</li> <li>Dual Credit</li> <li>Workforce Development</li> <li>Professional Development</li> <li>Community Education</li> <li>Adult Basic Education/GED</li> <li>Active Aging</li> <li>Multi-role</li> </ul> <p>Provides out-of-the-box functionality for most or all SIS, ERP, and CRM capabilities without the need for custom software development.</p> <p>Provides the ability to seamlessly integrate with CSI systems and applications and common software systems designed for the higher education industry.</p> <p>Provides an intuitive, consistent, and personalized digital experience across all modern computing devices (e.g., web, mobile, and touch devices).</p> <p>Provides users with a common application interface for all college operations encompassed in SIS, ERP, and CRM capabilities.</p> <p>Aligns with industry standards that help CSI deliver an integrated, scalable, and resilient enterprise architecture.</p>

49	General	Can you verify where we can email our RFP Responses?	RFP Responses can be sent via the U.S. mail as outlined in the RFP Section 1, or emailed to Larisa Alexander (lalexander@csi.edu) and Andy Williams (andywilliams@csi.edu). Please note the 25MB size limit for an email.
50	References	IS it ok to submit a reference without a "wet" signature?	Yes