



OFFICE OF THE CHANCELLOR
PO BOX 7
MONTPELIER, VT 05601
P (802) 224-3000
F (802) 224-3035

Vermont State Colleges
Request for Proposals
Colleague Merger and Consulting
11/5/2021

Proposals due:
11/23/2021
5:00 PM Eastern Time

1.0 Organizational History

1.1 General Information

The Vermont State Colleges (VSC) is Vermont's system of public higher education. The colleges are located throughout Vermont and include four institutions:

- Castleton University
- Community College of Vermont
- Northern Vermont University
- Vermont Technical College

Together the colleges enroll more than 11,000 students of all ages and backgrounds; students come from Vermont, the U.S., and around the world. The colleges offer more than 125 academic programs at the associate, baccalaureate, and master levels. All offer small classes and individualized attention for students.

1.2 Mission Statement

For the benefit of Vermont, the Vermont State Colleges system provides affordable, high quality, student-centered and accessible education, fully integrating professional, liberal, and career study.

This integrated education, in conjunction with applied learning experiences, assures that graduates of VSC programs will:

1. Demonstrate competence in communication, research and critical thinking;
2. Practice creative problem-solving both individually and collaboratively;
3. Be engaged, effective, and responsible citizens;
4. Bring to the workplace appropriate skills and an appreciation of work quality and ethics;
5. Embrace the necessity and joy of lifelong learning.

The Vermont State Colleges system provides continuing educational opportunities for individuals to meet their specific goals.

2.0 Introduction

The Vermont State Colleges (VSC) will be [merging our three residential institutions](#), Castleton University, Northern Vermont University, and Vermont Technical College into a new entity, Vermont State University, in July of 2023. The creation of Vermont State University presents an opportunity to redefine our existing structures to find operational efficiencies and to deliver the best student experience possible. The VSC have been on Colleague for a number of years and operate as one instance of Colleague with a number of customizations built into the system to support targeted business process at each institution, sometimes in a unique way. The transformation ahead presents opportunity for us to redesign our business processes and in doing so to make strategic adjustments to

our instance and use of Colleague to adapt to a more streamlined practice. The VSC currently uses Colleague Core, Student and Finance. In addition to providing broad project management assistance, we are seeking assistance in assessing our levels of custom code, supporting timely discovery around current and future business processes, and prioritizing resources to augment and support the layers of technical work to unwind and repackage based on our redefined process. We will also need assistance with training and education as we roll-out phases of our business process. Our primary focus short-term is to prioritize on our business process redesign and will seek to streamline our use of Colleague and all its tools to respond to the redefined process. It is important to note that the Community College of Vermont remains in our instance of Colleague and is a critical stakeholder in this project. Where possible, they will continue to use Colleague “as is” while the other institutions accomplish their merger. In a later phase of transformation, we will look for opportunities to streamline processes and systems to support the remaining university and community college, but that is outside the scope of this current effort. We will consider this work foundational to ensuring we meet the short-term needs of transformation as we look forward towards building out a longer-term and sustainable infrastructure strategy that is built with the business process as a critical strength and foundation.

3.0 Requirements

The following is a listing of the key functional requirements for the Colleague Merger and Consulting RFP. VSC will measure individual submissions against these.

3.1 General requirements

3.1.1 Conduct an assessment of our custom code and data usage to determine what can be deprecated, what needs to persist, and what may now be accomplished through re-training/configuring on standard application functionality

3.1.2 Conduct a high-level assessment of current business processes and identify critical gaps, considerations of missing best practices, and provide direct guidance for redesign

3.1.3 Develop and deliver on a timely project management roadmap that identifies critical decision points required for Colleague redesign and configuration, and that aligns with the transformation timeline, other system critical dependencies, and our general business process lifecycle starting with recruitment of new students for the new entity in Fall of 2022

3.1.4 Provide staff augmentation and technical support to address a redesign and configurations needed for each functional area served by Colleague

3.1.5 Provide workshops, training, education, and support to our critical functional areas and supporting IT staff

3.1.6 Identify any specific process or systems dependencies with CCV’s use of Colleague that would need to be addressed during this phase

4.0 Qualifications, References and Pricing

4.1 Qualifications and References

Provide a description of the qualifications and experience of your company. Include responses to the specific required items listed below:

Bidder Profile and Qualifications

- Name, mailing address, email address and telephone numbers of company.
- Number of years in business.
- Number of employees in Vermont and nationally.
- Number of colleges and universities in which the product is installed and maintained by the bidder.

Qualification and Engagement Approach

Provide a description of the qualifications and experience of your company. Include responses to the specific required items listed below:

- Qualifications and expertise required to perform against general requirements listed, specifically in a university system environment.
- Client engagement approach and methodology.
- Proposed scope of work and high-level timeline, including identifying crucial dependencies and which requirements, policies, and decisions are needed by which milestones.
- Expectations of client resources and level of effort (with detail).
- Provide any direct insight into which of the requirements of this RFP you might be able to offer unique value. Given how critical this project is for responding to our transformation roadmap, the VSC might choose to engage different vendors for different elements of the scope of services based on the RFP response.

Bidder References

You must demonstrate experience and capability in installation and maintenance of the proposed solution by providing evidence of successfully completing projects of similar size and scope. Please provide at least three customer references, with the following information:

- Customer name and location
- Short description of how this work is similar or relevant to the proposed work
- Contact person(s): name, title and telephone number
- Your project manager for the engagement
- Product installation date
- Number of years you have maintained the system

By submitting your proposal, you understand and agree that the VSC may make any investigations it deems necessary to determine your ability to perform the work. You agree to furnish the VSC all such additional information and data for this purpose, as the VSC may request.

4.2 Pricing

Your proposal should include all of the charges, and it should clearly state the pricing structure along with the types of products and/or services accompanying each price. The VSC expects fully bundled pricing for each service offered and any tiered pricing or volume purchasing discounts/rebates that maybe available due to purchasing loads.

4.3 Terms

4.3.1 Please provide clear term options based on any project phases/services.

4.4 Taxes/Fees

4.4.1 Please note any and all proposed taxes, fees, or charges.

4.4.2 The VSC is exempt from sales and use taxes. Submitted proposals shall not include these taxes. The College’s tax exempt number will be provided to the selected bidder. Please clearly note these exemptions in your proposal.

5.0 RFP Instructions, Requirements and Information

This section provides information on how to contact the VSC for questions, deadlines, the selection process, legal and insurance requirements, and other general business matters.

5.1 Questions about this RFP

Please submit your questions to the VSC on or before 11/15/2021, at 5:00 PM Eastern Time. All questions will be posted on the VSC website, www.vsc.edu, and made available to all bidders. The contact information for questions:

<i>Name</i>	Kellie Campbell
<i>Title</i>	Chief Information Officer
<i>Email address</i>	kcampbell@vsc.edu

5.2 Deadline and Delivery

The deadline for submitting responses is 5:00 PM Eastern Time, 11/23/2021. Provide an electronic copy **only, via email**, to:

<i>Name</i>	Kellie Campbell
<i>Title</i>	Chief Information Officers
<i>Email address</i>	kcampbell@vsc.edu

5.3 Selection Process

Method of Award

VSC will base the evaluation of each proposal to this RFP on its demonstrated competence, compliance, format, cost, and enterprise applicability. This includes, but is not limited to, product availability, quality, prices, service availability, timing, and delivery. The purpose of this RFP is to identify those vendors having the interest, capability, and financial strength to supply the VSC with a Colleague Merger and Consulting solution. If the VSC does not identify a suitable bidder within the RFP process, the VSC is not obligated to award the project to any bidder.

The VSC, in its best interests, reserves the option to accept or reject any or all proposals, to accept or reject any item or combination of items therein, to waive any irregularities or informalities in any proposal or items therein, and/or to negotiate with particular bidders following the evaluation of

proposals without right of recourse by other bidders. A top proposal would be that assessed in the judgment of VSC as best complying with all considerations set forth in this RFP. When VSC has tentatively selected a successful proposal, VSC may engage in discussions with the bidder to formulate plans in greater detail, to clarify unclear items for either party, and to otherwise complete negotiations prior to formal selection.

Evaluation Criteria (no weighting is implied by order of listing):

1. The extent to which the bidder's solution matches the requirements of the VSC.
2. Engagement methodology.
3. Bidder’s qualifications and references.
4. Cost and length of contract.

5.4 Bid Process

Date	Milestone
11/5/21	RFP issue date
11/15/21	Questions Due
11/23/21	Bidder written proposal due date
11/30/21	Finalists notified
Late week of December 6 and into December 13, 2021	Finalist presentations to VSC
12/16/20	Bidder(s) selected
**Before January 1, 2022	Contract(s) made

** The VSC will make its best effort to meet these dates but will take the time necessary to make a well-informed decision and negotiate a good contract. Bidders participating in this RFP should expect this date to change. The VSC will be under no obligation to inform bidders of a change in this date. The VSC will inform bidders of a change in all other dates that are part of the bid process.

5.5 Confidentiality

The Vermont State Colleges comply with the Vermont Public Records Act, 1 VSA § 315 *et seq.* which requires public agencies to allow any person to inspect or copy any public record upon request. Accordingly, bidders are hereby advised that any communications, data or other information received by the Vermont State Colleges during the RFP process could be subject to a public records request. However, certain public records are exempt from public inspection and copying, as set forth in 1 VSA § 317(c), including, for example, those portions of a record which meet the statutory definition of a trade secret. Accordingly, bidders should submit a second copy of their proposal, from which any portion of the proposal that the bidder reasonably believes to be exempt from disclosure under the Public Records Act has been redacted.

By submitting a proposal, you indicate that you understand the requirements of this subsection (5.5) and the potential applicability of Vermont's Public Records Act to your proposal.

5.6 Indemnification

The bidder shall indemnify and hold VSC, its officers, agents and employees free and harmless from any and all claims, liabilities, losses, actions, proceedings, suits, damages and expenses, including out-of-pocket litigation costs and reasonable legal fees, arising from or relating to the bidder's performance in response to this RFP and under any contract entered into with the successful bidder.

By submitting a proposal, and in exchange for VSC's consideration of same, you agree on behalf of yourself, your shareholders and your officers to be bound by the indemnification provisions of this subsection (5.6).

5.7 Rights of the VSC

VSC reserves the right, at its discretion, to pursue actions that include but are not limited to the following:

- Request additional information
- Request clarification of any sections or questions in the bidder's response to this RFP
- Reject, for any reason, any or all of the proposals submitted to VSC
- Issue subsequent RFP or RFP invitations to bid as a result of changes and/or refinements to the proposed project
- VSC might choose to engage different vendors for different elements of the scope of services based on the RFP response

This RFP does not obligate the VSC to accept any proposal, negotiate with any bidder, award a contract or proceed with the project as it is outlined in this RFP.

5.8 Assignment

The bidder may not assign or transfer its rights or obligations under this RFP without the prior written consent of VSC, which consent shall not be unreasonably withheld. Any assignment of the RFP agreement by the bidder without the prior written consent of VSC shall void the RFP response from the bidder.

5.9 Insurance

You shall provide with your proposal, proof of insurance as stated below. In the event you do not carry the maximums requested, you must provide written proof that you will be able to provide the maximums if awarded the contract. You shall secure, pay for and maintain in effect the following insurance during the contract period:

- Commercial General Liability Insurance: Including Bodily Injury and Property Damage Liability, Independent Contractor's Liability, Contractual Liability, Product Liability and Completed Operations Liability in an amount not less than \$1,000,000 combined single limit, per occurrence, and \$3,000,000 annual aggregate.

- Workers Compensation and Employers Liability Insurance: For any bidders with employees, standard workers’ compensation as required by Vermont State statute and employer’s liability insurance in an amount not less than \$100,000 per accident, \$500,000 annual aggregate.
- Automobile Liability: For bidders who will drive on VSC’s premises, Automobile Liability in an amount not less than \$1,000,000 per occurrence for bodily injury and property damage, including owned, hired, and non-owned vehicle coverage.
- Professional Liability: \$1,000,000 each claim, when applicable.
- Cyber Liability: \$1,000,000 each event for Breach Response

If selected as the successful bidder, you agree to name the VSC as additional insured on your liability policies and shall provide a 30-day notice of cancellation or non-renewal of coverage to the VSC. The VSC does not need to be named as an additional insured on the workers compensation policy.

If selected as the successful bidder, you agree to submit a copy of the Certificate of Insurance verifying the above coverage levels to the VSC twenty (20) days prior to selling or distributing products and services at VSC or otherwise performing under the contract. Any liability coverage on a “claims made” basis shall be designated as such on the certificate.

Failure of the bidder to take out and/or maintain any required insurance shall not relieve the bidder from any liability under the contract, nor shall the insurance requirements be construed to conflict with or otherwise limit the obligation of the bidder concerning indemnification. The bidder’s policies shall be considered primary insurance and exclusive of any insurance carried by VSC.

5.10 Intent to Bid

The undersigned (“You”) agrees to all provisions required in the Colleague Merger and Consulting RFP dated 11/5/2021 and all applicable addenda, with the exception of those listed below. Any exemptions listed may affect the viability of your proposal.

In addition, the undersigned (“You”) agrees to provide all equipment, material and personnel associated with these services as described in the Colleague Merger and Consulting RFP dated 11/5/2021, and all applicable addenda.

Exceptions:

Section Reference Number	Reason for exception

Company Name

Signature of Authorized Representative

Print Name of Authorized Representative

Print Title of Authorized Representative