



**ADDENDUM**

**SOLICITATION NO.:**  
P-2023-012432-JK

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**SOLICITATION NAME:**  
BUSINESS PROCESS IMPROVEMENT

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**ADDENDUM NO.:** 1

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**CLOSING:**  
AUGUST 3, 2023 (11:00 AM, PT)

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**DATE:** JULY 24, 2023

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**PROCUREMENT ANALYST:** JENNIFER KOEHNE

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**The following questions were received regarding the solicitation named above. OSU has provided answers below to each question, and the RFP or contract documents have not been modified as a result.**

1. In previous public documentation made available, guidance was provided regarding the estimated OSU investment/5-year model/budget by year. Is OSU open/flexible for redistribution of effort/budget/expenditure across years to fit recommended bidder methodology/strategy to deploy?
  - OSU will enter a contract with Proposer that outlines the Statement of Work and effort as it is known during the contracting phase. As the work progresses, we would be open to amending (change order) of effort/budget/expenditure across years as necessary and agreed to in writing by all parties.
  
2. Will the organizational transformation referred to in the OCM RFP and assumed in the Business Process RFP by the significance of the business process transformation also be designed and implemented as part of the Business Process RFP scope or will it be included in the ERP Implementation RFP?
  - The business process partner will be assisting with developing planned business process redesign, but the implementation partner separately will be implementing and configuring these new business processes. We do anticipate the business process redesign services to continue to be involved throughout the duration of the program to provide, monitor, and control activities ensuring the prioritization and effective implementation of impactful business process improvements.
  
3. When do you expect to conclude your evaluation, contract, and start work related to:

OSU anticipates the following timelines related to Organizational Change Management (OCM), Business Process Improvement and ERP Implementation Partner. Please note that these timelines are subject to change.

- OCM
  - September 2023
- Business Process Improvement
  - October 2023
- Implementation Partner program
  - January 2024

4. Do you envision Strategic Services/Business Process Redesign to have constant communication/involvement/continuity with ERP implementation services team from the outset of the program's starting points?
  - Collaboration across a variety of partners is key as AMP intends to utilize distinct implementation, OCM, and process improvement partners. The purpose behind this approach is to ensure that appropriate attention and services are provided to each functional area to ensure the success of AMP. OSU is looking for Proposers to demonstrate their expertise in this area and is interested in learning more about how Proposers would recommend structuring communication/involvement/continuity regarding implementation in this area.
  
5. What is OSU's vision of where business process design ends with the BPD team and business process construction begins with the ERP implementation team?
  - OSU is looking for the Proposers to demonstrate their expertise in this area and would like for the Proposer to address how they would recommend managing this aspect of the work.
  
6. For the "in scope" areas (human resources, finance, and planning/budgeting, perhaps some student), can you share an inventory of processes that we can use to help estimate this work?
  - As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.
  
7. Given the complexity of OSU, we need to assume we will have cross OSU participation on each of the process areas or that we will conduct individual process sessions for each unique organization, depending on how unique they work. What guidance can you give that will help us estimate and provide pricing?
  - At this juncture we envision a group of less than 10 OSU business analysts who will work closely with the business process improvement partner. The partner will develop the framework, approach and process with the OSU business analysts. The OSU business analysts will facilitate the approach with project teams and with each unique OSU unit as needed.
  
8. On page 3, the RFP mentions "Process improvement services will be required from start to finish of AMP activities throughout the next 3-5 years. We anticipate the early phases to be focused on the redesign of processes and the later phases to be focused on the verification and validation of implementing those processes." For our estimation and pricing, how do you advise estimating the effort and cost?
  - OSU is looking for the Proposers to demonstrate their expertise in this area and would like for the Proposer to address how they would recommend estimating the effort and cost.
  
9. With respect to "Use the experienced of peer institutions across the country" on page 4, does OSU already have relationships with contacts at these organizations, or is that a task that the consultant should drive?
  - OSU does already have relationships and contacts with peer institutions related to this work. However, the ideal partner will be bringing examples from previous successful process improvement efforts in higher education for efficiency.

10. With respect to “monitor and control services” on page 4, has OSU adopted a metrics taxonomy thus far?
  - No, OSU has not adopted a metrics taxonomy thus far. OSU is looking for the Proposers to demonstrate their expertise related to this deliverable and wants the Proposer to address how they would meet that deliverable in their response.
  
11. On page 5, and the mention of “training for OSU AMP team members and creation of a final deliverable that documents and validates across all AMP projects that new business processes align to industry best practice.” Should we interpret this as we should train some number of OSU resources who can provide assistance as part of the project team? If so, how many people should be trained and what assumptions can we make about involving them?
  - At this juncture we envision a group of less than 10 OSU business analysts who will work closely with the business process improvement partner. The partner will develop the framework, approach, and process with the OSU business analysts. The OSU business analysts will facilitate the approach with project teams.
  
12. Our methodology generally assumes we will document a current state process map as well as a future state. In addition, on similar projects we look to identify quick hits. Should we assume this is part of our scope of work?
  - Yes, it is appropriate to assume that this is part of the scope of work. However, it is important to incorporate the “Fit to Standard” approach described in the RFP as it relates to this work. We anticipate the current state process mapping will be a lighter touch scope of the work based on the “Fit to Standard” approach.
  
13. The RFP stated the Business Process Improvement/Redesign effort will happen concurrently with the other individual projects as part of the AMP. Does OSU anticipate there will be some activities that will predominantly occur prior to ERP implementation?
  - We anticipate having the process improvement partner in place prior to the implementation partner. OSU is looking for the Proposers to demonstrate their expertise related to activities and the timing of when they are appropriate to take place in relation to the ERP implementation.
  
14. Does OSU already utilize any Robotic Process Automation (RPA) or Process Mining applications?
  - No, we do not currently utilize any of those applications.
  
15. To what degree does OSU currently collect, analyze, and report on operations activity data, e.g., number of transactions, rework, trouble tickets, etc. across the institution?
  - This level of reporting varies across the organization. The unit responsible for the existing ERP does keep very close track of operational and project ERP request activity.
  
16. Legacy system customizations often serve as an indicator of business process complexity or variability. What level of customization exists in the legacy Banner solution, and has OSU limited further customization in anticipation of this effort?
  - There is currently a moderate level of customization in the legacy Banner solution. OSU has been rolling back customizations for the past five years. OSU is also freezing any customizations that are not mandatory/regulatory in nature or required as part of any regular operational activity.

17. OSU's AMP Website makes reference to customer journey mapping. Has OSU conducted any journey mapping work to date?
- As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.
18. There are mentions of two other RFP's, Implementation of a cloud-based ERP solution and Organizational Change Management. Where can these RFPs be found? If they are not out yet, when do you anticipate their release?
- OSU's procurement department posts formal solicitations on the OSU Business and Bid Opportunities website (<https://bid.oregonstate.edu/>) under Professional Services, Goods & Services. Organizational Change Management has already been posted with proposals collected and being evaluated. The Implementation Partner RFP will post to this same site once OSU is ready to move forward with that initiative, date TBD.
19. Please specify expected Start and Finish timelines of all three projects (1-process, 2-ERP selection, 3-Change Management Engagement) – a not to exceed price on this one Process component of the Program cannot be calculated without an expected timeline with breakdown of the three anticipated projects (all 3 RFPs). If this information is unknown currently, which the RFP alludes to – please modify this RFP to submit rates only.
- Estimated timelines have been detailed in question 3 above, please refer to that question. The RFP per Sections 3.01, 6.03 indicates that OSU may negotiate Statement of Work, Contract Price as it is affected by Statement of Work and any other terms and conditions as determined by OSU. As a result of those negotiations, coupled with OSU's flexibility per question 1, (see question 1 above), OSU is not inclined to change Exhibit D at this time to be rates only. OSU feels there is a benefit to understanding all the listed pricing elements on the Exhibit and OSU is looking for the Proposers to demonstrate their expertise related to the activities under the RFP to provide a not to exceed number at this time.
20. We have used and seen "fit to standard" during a previous SAP implementation where the SAP version was the standard that we are designing processes around. Please elaborate on "fit to standard" and how the AMP is using this term if a specific ERP is not yet identified.
- OSU will expect the business process partner to commence activities with the OSU AMP team immediately after finalizing the contract and will not be contingent on the timing of the selection of an ERP vendor. "Fit to Standard" work will be done as able, until an ERP is known.
21. What vendors have already been selected for the other parts of the AMP? Will they be eligible for this project as well?
- No vendors have been selected for other parts of the AMP at this time.  
OSU has already issued and collected Proposals for selection of an OCM partner, Business Process Improvement partner is currently posted and closes August 3, 2023, and an RFP for an Implementation Partner (helping configure and drive project of ERP implementation) will be posted in the future. Per the RFP, under Section 2.01. OSU is interested in moving forward with the Proposers that can best provide the services under each RFP. If Proposer intends to submit a Proposal under each RFP, then Proposer needs to demonstrate that they have the resources to

effectively manage all the services they submit a Proposal for and that separate teams within the Proposer's organization are utilized to ensure that the services are effectively provided in a manner that meets OSU's needs. It is OSU's expectation that teams for Organizational Change Management, Business Process Improvement and Implementation are dedicated, separate and distinct so that OSU's requirements are not compromised by the desire to implement new tools within a single vendor's expectations.

22. Is there any ERP knowledge (from a specific vendor) that will be useful on this project team?

- At this time, we are looking to identify a Business Process Improvement partner based on business process redesign focus and expertise, agnostic of a specific tool.

23. What on/offsite cadence is preferred on this engagement?

- There is no preferred percentage of time required for on-site versus off-site. Onsite support will depend on the process improvement plan developed and determined by the AMP program team and leadership as that plan is vetted and finalized. OSU is committed to meeting our community where they are in the process. If in-person meetings and engagements are needed, they will be expected and prioritized.

24. What are some of the key legacy applications and third-party systems currently in place at the OSU that will come into scope for this project?

- The current ERP is Ellucian Banner. We envision the business process framework and approach to be tool agnostic. We will be engaging in a Fit to Standard approach as described in the RFP.

25. Can you please identify the roles that will be assigned to the OSU AMP Team?

- OSU will have a dedicated AMP team led by an Executive Director with several roles that will address the needs of the full program. For business process, in addition to the Executive Director, there will be at least one dedicated resource that will work directly with this business process partner.

26. In addition to core administrative HR, finance tools/processes, can you identify what some of the student facing tools and processes would be included in the scope of work?

- Student employment processes will be impacted by the program. As we commence the work on business process redesign through the Fit to Standard approach, additional student facing processes may be identified.

27. Is the existing Banner ERP undergoing modernization?

- The existing Banner ERP will not be undergoing any modernization.

28. Has OSU decided about their future ERP Solution? What ERP systems are being considered, and what are the decision criteria for the final selection? If a future ERP Solution has not yet been selected, is Banner SaaS still a potential option for your future ERP solution?
- We are not able to share any information related to ERP systems being considered or the decision criteria for the final selection at this time.
29. The RFP indicates the use of "Fit to Standard" approach which will utilize leading practice and vendor processes. Please share which ERP vendors are being considered for implementation to enable "Fit to Standard" considerations.
- See question 28.
30. Does OSU intend to select the ERP vendor prior to initiation of Business Process activities?
- OSU will expect the business process partner to commence activities with the OSU AMP team immediately after finalizing the contract and will not be contingent on the timing of the selection of an ERP vendor.
31. In the RFP on page 2, paragraph 3, it references two additional RFPs, and that OSU is interested in moving forward with proposers that can respond to each RFP. Does this mean a proposer is unable to respond to this individual RFP for Business Process Improvement? Will a vendor have equal chance for selection if only responding to the current RFP for Business Process Improvement
- See question 21.
32. Will OSU confirm that the scope of this Business Process improvement RFP is focused only on Finance, HCM and Budget and Planning? Will OSU confirm Student systems are not included in the current scope?
- Some student facing tools and process related to Finance, HCM, and Budget & Planning may be in scope. For example, student employment processes will be impacted by the program. As we commence the work on business process redesign through the Fit to Standard approach, additional student facing processes may be identified.
33. The RFP indicates that the functional scope for implementation activities and deliverables will also consider integrations with key legacy applications and third-party systems - Can OSU provide an inventory of these legacy applications and third-party systems you believe will continue to be supported in the future state?
- Information about integrations with OSU legacy applications and third-party systems will be made available to contracted partners as appropriate. This information will not be made public as part of the RFP process.
34. Has OSU completed any process analysis, organizational and/or other types of assessments or surveys over the past 12 months? If yes, is it possible to receive the high-level details of these items, and by whom the work was performed?
- As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.

35. There are many types of expertise described and required in the RFP, what would OSU say are the top three a firm must have?
- Please see the minimum and preferred qualifications listed in the RFP. All listed qualifications are important in the assessment of a business process partner for AMP.
36. We understand the projected timeline for this project is 3-5 years. Does OSU have an anticipated project start date?
- Milestones and timelines have not been firmly established. We expect the first year to be all about foundational steps including engagement with the OSU community, hiring an implementation partner, OCM partner and process improvement partner. With the hiring of an implementation partner to guide us, we will be setting project milestones, a timeline, and a more robust program plan. The initial scope is expected to include HCM and Finance in parallel with Payroll.
37. Does OSU have a preference between on-site and remote services for this engagement?
- There is no preferred percentage of time required for on-site versus off-site. Onsite support will depend on the process improvement plan developed and determined by the AMP Program team and leadership as that plan is vetted and finalized. We are committed to meeting our community where they are in the process. If in-person meetings and engagements are needed, they will be expected and prioritized.
38. The RFP indicates re-engineering scope includes core administrative HR, finance, and some student facing process. Please provide an inventory of which processes are in scope for each area.
- As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.
39. To what extent are HR, Finance, and student facing services administered centrally in a standardized manner currently?
- HR and Finance functions have varying degrees of centralization and standardization. Areas such as accounts payable, student billing, grant billing, payroll, external financial reporting, treasury, employee and labor relations, classification and compensation, benefits, recruitment are the most centralized. Budgeting and managerial reporting are highly decentralized.
40. What previous efforts has the institution undertaken to redesign business processes in the past? What was the result of those efforts?
- No significant institutional central level effort has been undertaken to redesign business processes in the past. Most commonly, business process redesign efforts have been undertaken in silos and managed per individual unit needs.
41. Does OSU plan to dedicate FTE to supporting the development of redesigned business processes? If so, what roles would be staffed and how many total FTE?
- At this juncture we envision a group of less than 10 OSU business analysts who will work closely with the business process improvement partner. The partner will develop the framework,

approach, and process with the OSU business analysts. The OSU business analysts will facilitate the approach with project teams and with each unique OSU unit as needed.

- We will be asking for committed subject matter expert FTE and staffing representation from relevant units at OSU. Staff Augmentation services will be utilized to fulfill necessary FTE in units across OSU that will be asked to commit resources to AMP.

42. Given the scope of Oregon State University's presence across the state, please share more on the expectation of OSU resource commitment from AMP project team and representatives from colleges. Will each college, unit, center, etc. have dedicated representation in reengineering activities?

- See question 41.

43. The RFP indicates that process improvement services will be required throughout the AMP activities. Is it OSU's intention to complete initial process reengineering prior to implementation beginning?

- OSU is looking for the Proposers to demonstrate their expertise in this area and would like for the Proposer to address how they would recommend managing this aspect of the work.

44. To what extent is OSU considering organizational restructuring to drive or result from reengineering activities?

- We anticipate minimal organizational restructuring as a result of these activities. Any recommendations for organizational restructuring will be proposed and considered through the AMP governance process.

45. What documentation exists of current business processes?

- As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.

46. What is the current governance structure of the AMP program (e.g., roles, committees, involvement)?

- AMP Management and Governance—On point for the effort is the Division of University Information and Technology (UIT), led by vice provost for information technology and chief information officer. An AMP Steering Committee, part of OSU's new information technology governance structure and charged by the provost and executive vice president along with the vice president for finance and administration, will oversee and guide the AMP program. The steering committee will monitor the success of all activities to completion, including individual projects, the organizational change management program, and expenditures and realized savings. These efforts will be led by the executive director for AMP.

47. Business processes related to ERP use ideally influence the technical requirements of the system; will this process improvement effort be able to influence final technical requirements or configuration of OSU's ERP?

- Yes, this process improvement effort will influence final technical requirements or configurations of OSU's ERP. Part of the rationale for having a separate process improvement partner and a separate implementation partner is to ensure the prioritization and effective implementation of impactful business process improvements.



48. If requirements have already been gathered, what was the process to define them? To what extent have user journeys been mapped to inform those requirements and change management planning?
- As we prepare for the incoming business process partner, OSU is in the early stages of creating a business process inventory. No business analysis has been completed.
49. What are the phases for the overall program (beyond the phases represented by the 3 RFPs), and what is the status of those phases? How do you anticipate measuring progress and interdependencies between the phases?
- Phases for the overall program have not been established. Once contracted, we will be working with all our partners to develop phases for the overall program.
  - Related to measuring progress and interdependencies between phases, OSU is looking for the Proposers to demonstrate their expertise in this area and would like for the Proposer to address how they would recommend managing this aspect of the work.
50. What resources from OSU will support this – are they primarily subject matter experts with separate day to day responsibilities, super users, or dedicated personnel that will support only this effort?
- At this juncture we envision a group of less than 10 OSU business analysts who will work closely with the business process improvement partner. The partner will develop the framework, approach and process with the OSU business analysts. The OSU business analysts will facilitate the approach with project teams and with each unique OSU unit as needed.
  - We will be asking for committed subject matter expert FTE and staffing representation from relevant units at OSU. Staff Augmentation services will be utilized to fulfill necessary FTE in units across OSU that will be asked to commit resources to AMP.
51. What is the underlying strategy for this replacement (besides reducing technical debt), and what has been the level of organizational alignment to that strategy?
- AMP details and context can be found here: <https://uit.oregonstate.edu/amp>

Entities are not required to return addendums with their offers but are responsible to make themselves aware of, obtain and incorporate into their final offer any information contained in addendums. Failure to do so may make the offer non-responsive and cause it to be rejected.