

CMU 2811

REQUEST FOR PROPOSAL (RFP)

For Software and System Integration Services in support of
Colorado Mesa University's Human Resources (HR) and Finance
Transformation Efforts

RFP Background & Instructions

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PART 1 – RFP OVERVIEW AND GOALS

Section 1.1 Institutional Background

Founded in 1925, Colorado Mesa University (CMU) is a regional public higher education institution that offers a wide range of academic programs at the master's, bachelor's, associate, and certificate levels. Accredited by the Higher Learning Commission, Colorado Mesa is committed to providing quality education that prepares students for success in today's complex world. With an enrollment of over 10,000 students, including a significant number from outside Colorado, the university boasts a diverse student population. Offering evening, online, and distance education classes, Colorado Mesa caters to the needs of non-traditional and working students. Situated in the picturesque city of Grand Junction, the main campus spans 141 acres and is surrounded by stunning mountains and canyons, providing ample opportunities for outdoor recreation. For more information, see <https://www.coloradomesa.edu>.

Section 1.2 Overview of Human Resources (HR) and Finance Transformation Effort

CMU will engage a Software (SW) Vendor and System Integrator (SI) Vendor to implement an HR and Finance Enterprise Resource Planning (ERP) system, starting early 2025. CMU seeks Vendor(s) who have prior experience implementing Software as a Service (SaaS) HR and Finance ERP solutions in the Higher Education industry. Vendors are expected to consider CMU's strategic drivers (Figure 1) in their response and to propose the most appropriate approach, solution design, implementation, deployment strategy, staffing, and pricing that advances the University on these fronts.

Figure 1. Strategic Drivers for CMU's HR and Finance Transformation



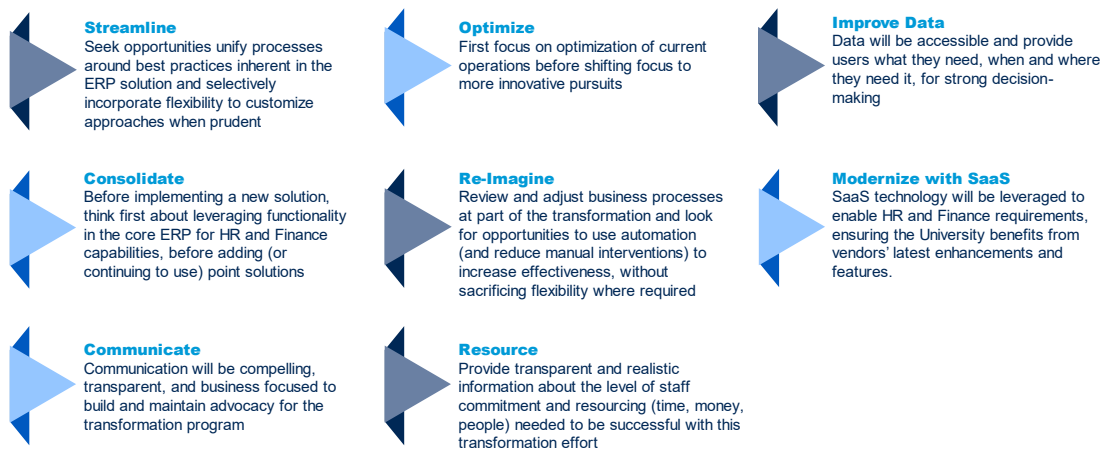
CMU defines ERP as a solution that includes the core HR and Finance capabilities necessary to maintain its business operations and complete this HR and Finance Transformation effort. In addition to HR and Finance functions, this request also includes a request for Procurement-related capabilities. While CMU currently has a core Procurement solution in place, they would like to evaluate in-suite options to re-evaluate their go-forward plan in this functional area.

CMU began using Ellucian Banner as its ERP in 1990. Since then, the University has worked to maintain its ERP investment by re-implementing Banner modules and adding solutions to transform its business processes, developing a postmodern ERP. Over the last decade, the University has invested in point solutions and integrated them with Banner to add functionality and web services for students and employees. The majority of the point solutions implemented and integrated with the ERP have been cloud-based solutions. For instance, in 2017, the University implemented a cloud-based HR employment applicant tracking system that included the development of a custom interface to feed new employee hire data from the applicant tracking system to

Banner HR. Maintaining data integrations and ensuring the integrity of the data continues to be a challenge faced by technical staff. In 2022, CMU migrated its on-prem Banner environment to Ellucian’s hosted environment running on Amazon Web Services.

This has, to this point, allowed the institution to stay in step with business and student demands, though the University faces challenges with rapidly deploying new technologies. The University’s HR and Finance Transformation effort must position the institution to leverage ever-evolving technologies that not just re-implement current business processes but re-imagine their approaches to deliver business outcomes. Along those lines, CMU has developed guiding principles (Figure 2) to use as guiderails for their HR and Finance transformation effort. Vendors should consider these guiding themes in their proposal and ensure clarity on how their solution can assist the University in advancing in these important areas.

Figure 2. Guiding Principles for CMU’s HR and Finance Transformation



Section 1.3 HR and Finance Transformation Functional Scope

The scope is currently divided into three “Level 0” Capabilities: HR, Finance, and Procurement. Each of these is further divided into “Level 1” Capabilities. Detailed context about each capability are provided in attachment 2.4) Functional Requirements.

- Finance Capabilities
 - Perform General Accounting
 - Manage Accounts Payable
 - Manage Treasury and Cash
 - Manage Billing and Accounts Receivable (AR)
 - Perform Period Close
 - Manage Fixed Assets
 - Manage Grants as Grantee/Grantor
 - Manage Budget and Planning
- HR Capabilities
 - Acquire Talent
 - Administer HR
 - Manage Workplace Compliance and Guidance
 - Manage Workforce/Employee Relations
 - Manage Workforce Performance

- Manage Workforce
- Manage Total Rewards
- Manage and Process Payroll
- Procurement Capabilities
 - Strategically Source
 - Purchase Direct/Indirect Materials and Services
 - Manage Vendor Relationships
 - Manage Supplier Contracts
 - Manage Solicitations

Section 1.4 Software (“SW”) Summary

With this RFP, CMU intends to:

- Implement a new SaaS ERP Suite with modern features and interfaces, and transition all feasible HR, Finance, and Procurement-related business capabilities to the core solution.
- Significantly consolidate the application landscape, taking a “core-first” approach and only integrating essential point solutions to fill necessary functional gaps.

This will provide CMU with the following results:

- A modern ERP experience and the maintenance/support advantages of a Software as a Service (SaaS) solution.
- Primary focus for technical staff on a single vendor, simplifying management and promoting growth of internal skillsets.
- A simplified solution architecture with capabilities concentrated in the core ERP solution.
- Simplified vendor management and ongoing support model.

CMU will utilize a cloud-first approach to replacing its core ERP solution and ancillary applications. The solution must provide a SaaS, cloud-based ERP solution with extensive capabilities in Financial Management, and Human Resources Management aligned to the scope defined in Section 1.3. The University intends to prioritize the use of out-of-the-box functionality, leveraging customization only where absolutely necessary.

The University may choose to expand the above scope, replacing point-solutions and further consolidating capabilities within the core ERP solution (as an example, the University may choose to utilize elements of available Procurement functionality to replace their current solution); the minimum functional scope is outlined Section 1.3. CMU will assess software against the fit to its requirements and use cases as defined in this RFP.

Section 1.5 System Integrator (“SI”) Services Summary

We expect that the selected Vendor(s) will fulfill the services summarized below. The SI should assume that product-specific configuration/build/test activities require recent and deep knowledge of full product capabilities with some level of support from the software vendors or designated third party partners.

We expect the proposal to summarize and highlight your methodology, differentiators, tools, accelerators, etc. We also expect the proposal to clearly articulate the overall team organization, staffing plan, and associated assumptions of the proposed approach.

Implementation Services should consider the following:

- Governance and Project Management
 - Project Management and Planning (including supporting tools)

- Governance and Support
- Risk Management
- Planning and Design
 - Business Process Architecture and Reengineering
 - Use Case/user story definition and Functional Requirement gathering
 - Solution Design, based on best practices and pre-configured solutions your organization might have
- Configuration, Build, Test
 - GUI/User Experience configuration and usability
 - Solution Configuration (including Workflow)
 - Integration Development
 - Data Cleansing and Migration (including supporting tools)
 - Security and Controls
 - Reporting & Analytics
 - Solution extensions
 - Testing (Unit, Integration, User, Performance, etc.)
- Deployment and Initial Support
 - Cutover Prep and Cutover
 - Immediate Post Go-Live Support Period
 - Supporting documentation and knowledge transfer for all the above
- Organizational Change Management (OCM) and Training
 - Communications Planning & Execution
 - Organizational Change Management
 - Business Case Realization
 - Training Development & Delivery

Throughout the duration of services, CMU may, at its discretion, engage with industry specialists for additional services. CMU will have the unilateral ability to add an Operational Level Agreement (OLA) for multiple providers to the Scope of Work (SOW) for ERP SI services, subject to mutual agreement.

Application Managed Services (AMS) are out of scope for the current RFP. CMU may explore an extension of its relationship with the SI to include AMS, dependent on the establishment of a successful relationship and successful application deployment over the course of SI services.

CMU will seek the guidance and collaboration of the selected SI to create a practical and achievable deployment plan. While not an exhaustive list, the following are contextual considerations for CMU's deployment planning:

- CMU is seeking a SaaS HR and Finance ERP suite, with rationalized point solutions, as defined in Section 1.4.
 - CMU is planning to consolidate foundational HR and Finance capabilities in a single 'core solution' in order to deliver a modern experience to business users and reduce the overall complexity of solution support. The core solution will need to have the capability to integrate with point solutions and CMU's EAB Edify data management platform, as described in Section 1.7, as needed in the near or long term.
 - CMU currently uses a point solution (JAGGAER) for Procurement activities and is evaluating the capabilities offered in a core ERP product suite to determine if consolidation of these capabilities are warranted.
- CMU seeks a functional deployment, beginning with HR modules.

- In order to minimize business risk and impact, CMU is seeking a functional implementation, wherein an enterprise design phase initiates the project, followed by certain functional areas/modules being deployed enterprise wide, one functional phase at a time in multiple deployment phases.
- CMU processes are largely non-standardized, and CMU is seeking guidance in order to adopt best practices within the Higher Education industry.
- CMU is willing to review and revise their existing business processes in order to streamline and improve the way they work as part of this transformation effort.

Section 1.6 HR and Finance Transformation Roadmap

The University plans to follow an ambitious HR and Finance Transformation Roadmap that defines sequenced initiatives that CMU must successfully undertake to optimize HR and Finance business capabilities and outcomes. This includes the categories summarized below.

Figure 3. HR and Finance Transformation Roadmap Categories

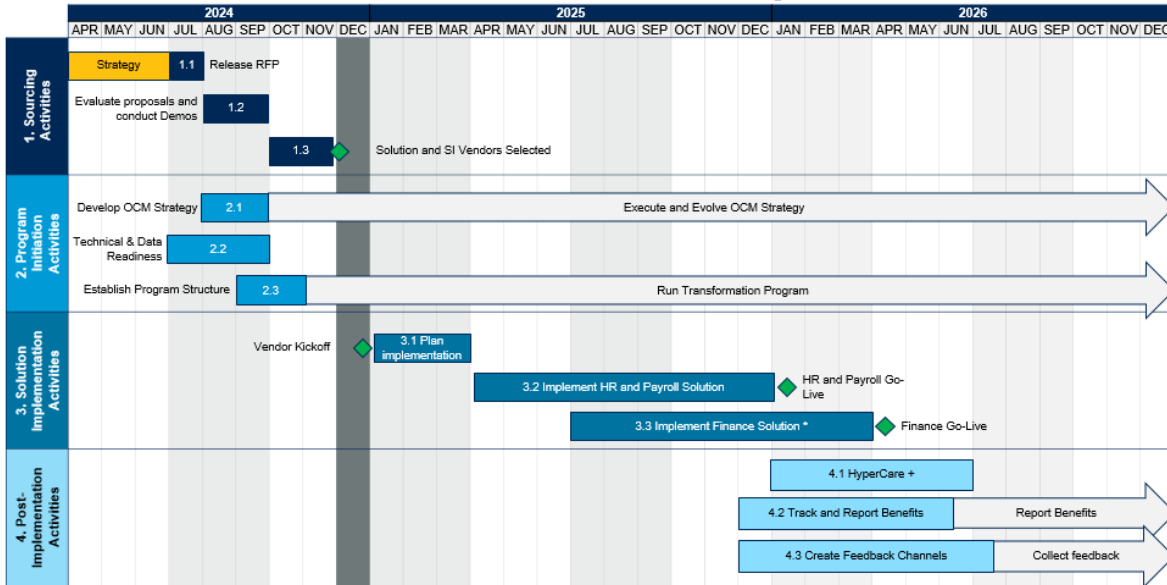
1 Sourcing Activities	2 Program Initiation Activities	3 Solution Implementation Activities	4 Post-Implementation Activities
<p>1.1. Release RFP for HR and FIN solution and implementation services</p> <p>1.2 Evaluate proposals and vendor demonstrations</p> <p>1.3 Facilitate selection and contract negotiation</p>	<p>2.1. Develop an organizational change management strategy</p> <p>2.2 Ensure technical and data readiness</p> <p>2.3 Establish HR and FIN transformation program structure</p>	<p>3.1. Plan implementation activities with systems implementation partner</p> <p>3.2 Design, build, test and deploy HR and Payroll solution using prescribed methodology</p> <p>3.3 Design, build, test and deploy Finance solution using prescribed methodology</p>	<p>4.1. Provide HyperCare for new HR and FIN solutions</p> <p>4.2 Track and report realized benefits</p> <p>4.3 Create user feedback channels</p>

Subsequent to this RFP, CMU expects that vendor evaluation, selection, and contracting activities will occur through fall of 2024, such that the ERP implementation efforts can kick off by early January 2025. Vendor(s) should consider the timeline proposed below in CMU’s HR and Finance Transformation Roadmap. Following evaluation, should all of part of offered Procurement functionality be deemed in-scope, accommodations for the timing of those implementation activities will need to be considered and added to the timeline.

As described below, CMU anticipates kicking off Implementation in January 2025, with three (3) months for Planning and approximately twelve (12) months for a phased functional roll-out. Following each go-live, CMU will require a period of one to three (1-3) months of Hypercare services following each go-live event before transferring maintenance to the University and/or its selected Application Managed Services provider.

Figure 4. HR and Finance Transformation Roadmap Summary

Colorado Mesa University HR & Finance Software and System Integration Services RFP



Section 1.7 Current Environment Overview

CMU currently employs a host of applications to address needed capabilities with the hope of achieving significant consolidation of these disparate tools with the implementation of the future SaaS ERP solution. It is not clear at this time which solutions will be decommissioned, and which will remain, as these choices will be dependent on the selected solution’s strength in each functional area.

There are also a number of concurrent initiatives which will be coordinated alongside the future ERP implementation. The most notable of these is an initiative is the implementation of EAB Edify data management platform to establish a Master Data Management (MDM) strategy and improve integration capabilities. Attachment 5.3 (Application Inventory) contains an overview of CMU’s current applications.

In summary, the application landscape and notable concurrent projects in the CMU environment are captured to provide awareness of the current state, and to emphasize the importance of Organizational Change Management (OCM) to address the replacement of long-standing legacy solutions, and the importance of a thorough rationalization and integration strategy.

CMU’s application portfolio includes over 40 applications, many of which are used for a few niche business functions. Ellucian Banner acts as the core ERP solution for most Human Resource and Finance capabilities, and JAGGAER is CMU’s primary Procurement application. Enterprise data visibility is currently limited, and the initiative described above is aimed at improvement in this area along with the implementation of the EAB Edify solution. CMU looks forward to rationalization of the current application landscape in favor of a more comprehensive approach focused on the robust use of a core ERP solution as visualized in the target state diagram below (Figure 7).

Figure 5. Conceptual View of CMU’s Current ERP Landscape

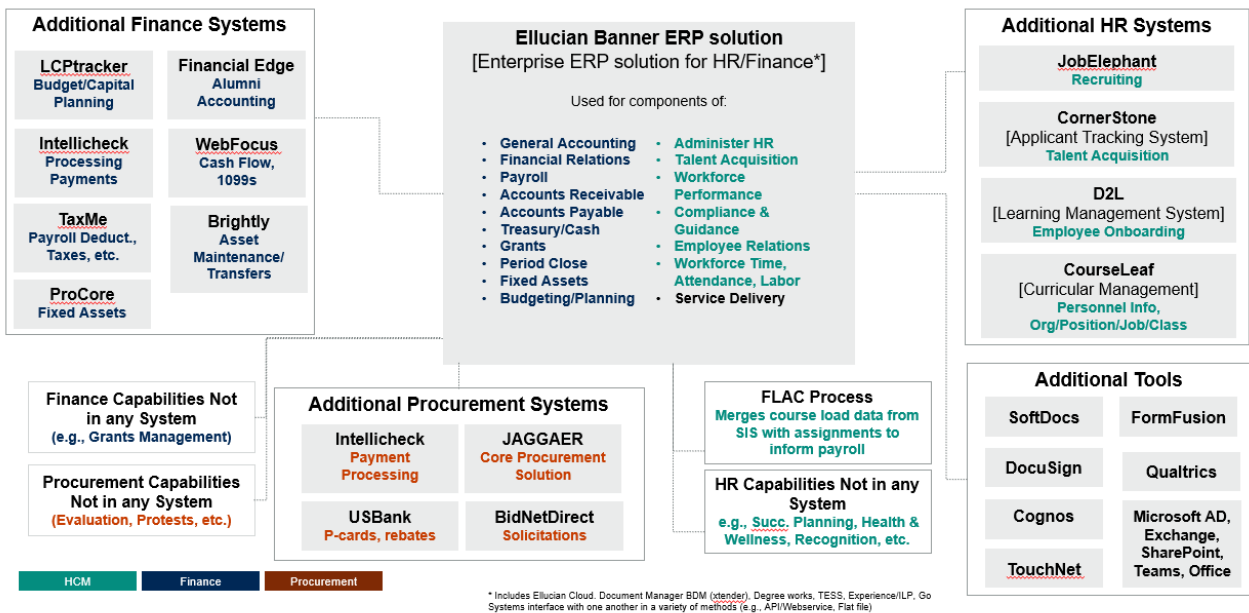
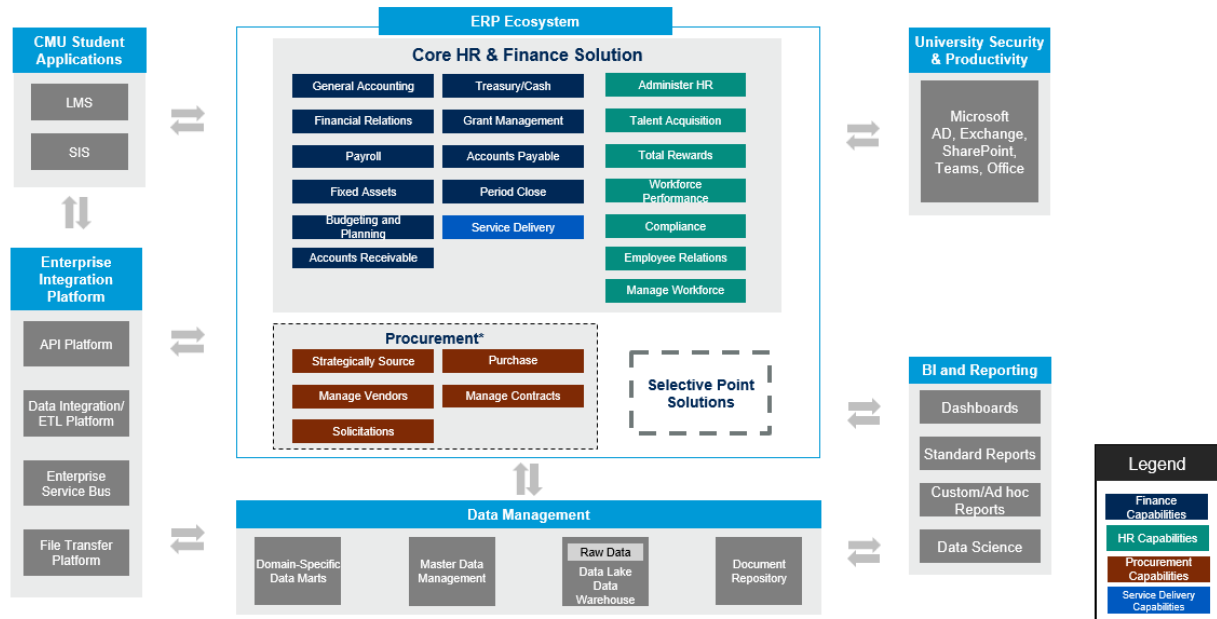


Figure 6. Simplified Target State



*Considering whether procurement capabilities are served best as part of the core HR/FIN solution or remain as a selective point solution.

CMU currently employs a variety of integration patterns which creates an opportunity to establish a preferred standard (EDI, API, SFTP, SSH, file transfer, etc.) that can be used as the rationalization process unfolds. CMU expects the chosen vendor to assist with establishment of this integration approach with the University’s full ecosystem in mind leveraging both currently available toolsets and those present in a new solution.

CMU is currently implementing EAB’s Edify platform to improve data sharing and governance, manage the flow of data between business applications and data sources, and expand the University’s reporting and analytics capabilities to achieve desired business outcomes. Edify is a comprehensive higher education data management platform that provides all the functionality of a modern data management stack in a single platform to include data lake, ETL/ELT, master data management, data catalog, data workflow, data monitoring, and analytics solution. It is CMU’s desire to leverage the Edify platform for its HR and Finance Systems Transformation project to limit the initial and ongoing cost of maintaining data integrations and historical data.

The University currently leverages Boomi Atom, integration Platform as a Service (iPaaS) platform, for select integrations to Banner 9, ERP and Student Information System. For example, CMU’s Banner-Jaggaer integration is near real-time using Boomi Atom and web services utilizing Banner Ethos APIs.

CMU has a custom identity management system, CMU-IDM, that consumes system of record or “master data” sources, populates Active Directory (AD), and manages role-based access to systems as well as synchronizes specific master data records such as username, email address, department, titles, etc. between applications.

The University uses Microsoft Active Directory/Azure Active Directory (Entra), Central Authentication Service (CAS), and Secure Assertion Markup Language (SAML) for authentication connectors and single sign-on to in-house and third-party on-premise and cloud-based applications. CMU is a member of InCommon.

This RFP includes the attachments 4.3) Technical Requirements and 5.3) Applications Inventory to assist Vendors with current state understanding of CMU’s application and integration environment. Vendors should

use this information as the basis for services and/or tools proposed to assist in articulating an integration approach. Any services or tools should be clearly stated and priced in Vendor's pricing response.

Vendors are expected to provide a specific approach to integration and data management so that the resulting solution is seamless, and the system architecture is designed to allow for optimal scalability, flexibility, interoperability, and low ongoing total cost of ownership (TCO). The proposal must include in its approach how the SI will leverage the Edify platform to promote leading practices to keep master data consistent and accurate across the University.

At a minimum, the proposal should describe the framework, best practices, processes, and architecture around the following items to ensure enterprise data consistency.

- Integrate with Edify data management platform, integration hub, and other MDM systems
- Manage data capture and cleansing
- Data migration from legacy systems to include a best practices recommendation for the number of years of data to migrate
- Prebuilt workflows and user interfaces using proven data models
 - Inbound and outbound templates
 - Out of box standard user interfaces for master data creation, maintenance, and enrichment
- Enrich master data with geographic and reference data
- Verifiable audit trail to capture data changes
- Master data replication inside and outside of ERP
- Data governance
 - Ability to enforce certain business rules & standards for master data
- Data catalog
 - Ability to capture and backlog data
 - Consolidated business glossary or the ability to store business definitions
 - Automated data discovery to continue to build data catalog as need
 - Data lineage
- Master domains
 - Ability to structure data domains
- Ownership and governance structure
 - Ability to assign data owners and data stewards to data domains
 - Trigger workflows based on owners and responsibility set
- Reference data management
 - Ability to manage reference data in a consolidated way across the different data domains
- Master data requirements for external suppliers in a self-service portal
 - Master data management for supplier self-service portals, with storage capabilities for onboarding
 - Present some high level and publicly available sales information to suppliers
- Integrations to third party platforms (i.e., APIs)
- Integration and alignment with BI & Analytics systems

Through the HR and Finance transformation project, CMU is also seeking to evolve its current capabilities in Business Intelligence (BI), reporting, and analytics. The list below describes the minimal areas of improvement that CMU wishes to achieve through this process:

- Creation of standard reports to support CMU's KPIs and operational metrics

- Drill down and drill through reporting for in scope areas
- Definition and creation of Performance Dashboards
- Provide analytics to support management and statutory reporting requirements
- Ad-hoc creation of reporting & analytics capabilities
- Self-Service & mobile analytics
- Creation of effective visualizations
- Analytics that can include data from legacy systems
- Supplier performance dashboards
- BI Design Approach, including real time analysis
- Preexisting and the ability to create advanced analytics models (data mining, predictive)

CMU and the selected partner will determine how best to utilize the native analytic capabilities in the chosen ERP product and where to strategically supplement or complement functionality with point solutions and Edify.

PART 2 – EVALUATION PROCESS GUIDELINES

Section 2.0 General Guidelines

CMU will appoint an evaluation team to use their own best judgment and consideration in evaluation and selection. The final selection will be based upon CMU’s sole discretion and decision of the best overall fit for the University’s needs. Emphasis will be placed on the proposers’ ability to address all the described functional needs, align with the established guiding principles, and advance the strategic drivers for the program. Failure of the Offeror to provide any information requested in the RFP may result in disqualification of the proposal and shall be the responsibility of the Offeror.

All proposals must remain valid for up to 180 days following the proposal due date. Any costs incurred during the development of this proposal or associated work will not be reimbursed. All information shall be submitted in the format stipulated in this RFP.

Section 2.1 Evaluation Process

All proposals submitted in response to this RFP will be reviewed for responsiveness prior to referral to the Evaluation Committee.

CMU will assemble an Evaluation Committee to review and evaluate the RFP responses and any subsequent demonstrations/oral presentations. This Evaluation Team will be composed of members of internal HR, Finance, Procurement, and IT teams. In addition, members of the Executive Leadership Team may assess or advise.

Each response will be scored by each member of the Evaluation Committee in each of the following areas:

Category	Description in Brief
Strength of Software Solution	Ability of Offeror(s) to provide a simplified, modern, and technically sound SaaS solution architecture that aligns with the stated guiding principles
Strength of Implementation Plan	An achievable approach and timeline to implementation that covers all necessary services specified in this RFP
Business Alignment	Ability of Offeror(s) to support CMU’s stated strategic drivers

Functional Fit	Alignment to and coverage of Finance, HR and procurement functional scope, requirements, and use cases specified in this RFP
Qualifications & Experience	Prior experience providing software and services to midsize and large-sized public sector institutions, with a strong preference for experience with higher education institutions of a similar size and complexity
Cost	Ability of Offeror(s) to provide CMU with a reasonable and competitive price

Section 2.2 Down-Selection and Vendor Oral Presentations, Demonstrations, and/or Site Visits

The University intends to request product demonstrations and/or oral presentations from shortlisted software and system integrator vendors. It will be at this time that the Offeror will be given an opportunity to highlight their solution.

Offeror(s) will be notified of their oral presentation date. SIs should ensure that key members of their teams are prepared to participate in these sessions, which may be conducted virtually or on-site at CMU’s offices.

CMU anticipates that such demonstrations will require at least one full day. The expected agenda will include:

- Opening Summary
- Approach Overview and Detailed Discussions
- Solution Demonstration(s)
- Proposed Timeline, Deployment Schedule, and Staffing Plan
- Key Personnel Meetings (meeting of CMU and Vendor key personnel, as needed)

Section 2.3 Conflicts of Interest

Offeror(s) must advise CMU of any potential conflicts of interest or personal or commercial relationships that exist and should be taken into consideration.

PART 3 – ADMINISTRATIVE INFORMATION

The following Administrative Information supports this Request for Proposal (RFP):

Section 3.1 Issuing Office

This RFP is issued by the Colorado Mesa University (“University” or “CMU”) Purchasing Department on behalf of the HR and Finance Transformation Leadership team. The Purchasing Department is the sole point of contact concerning this RFP. All communication must be done through the Purchasing Department.

Section 3.2 Official Means of Communication

During the solicitation process for this RFP, all official communication between the Purchasing Department and Offeror(s) will be via postings on the Rocky Mountain E-Purchasing System (RMEPS) website at: <https://www.rockymountainbidsystem.com>. The RMEPS website offers both free and paid registration options that allow for full access of the solicitation documents and for electronic submission of proposals.

NOTE: Free registration on the site may take up to 24 hours to process; plan registration to allow time for on-time bid submission. The University does not have access or control of the vendor side of the RMEPS site; contact RMEPS directly to resolve any issues encountered prior to response deadline at (800) 835-4603.

The Purchasing Department will post notices which will include, but not be limited to, any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning Offeror(s). It is incumbent upon Offeror(s) to monitor the RMEPS website carefully and regularly for any such postings. The Purchasing Department will also post communications through the University Open Solicitations website at: <https://www.coloradomesa.edu/procurement-payment/open-solicitations.html>. Information on this website is for reference only; the RMEPS website is the platform of record. It is incumbent that bidders review the University's Solicitation Instructions.

Section 3.3 Purpose of RFP

This RFP provides prospective Offeror(s) with sufficient information to enable them to prepare and submit proposals for consideration by the Purchasing Department to satisfy the need for expert assistance in the completion of the goals of this RFP.

Vendors shall prepare to provide the University with both the necessary SaaS software solution (“software”) and System Integration services (“system integrator”) outlined in this RFP. This is further detailed in Part 2 of this document.

Section 3.4 Definitions

Throughout this RFP, the following definitions will apply:

- The term “University” or “CMU” shall be understood to mean “Colorado Mesa University.”
- The term “Response” shall be understood to mean a written offer to provide goods and/or services in accordance with the general conditions, instruction, and specifications stated herein with the exceptions clearly stated, and may be used interchangeably with the terms “Proposal” and “Bid.”
- For purposes of this document, the party to whom the RFP is addressed shall be referred to as “Vendor(s)” or “Offeror(s)” and any materials submitted in response to the RFP shall be referred to as a Vendor’s “Proposal” and collectively, all proposals shall be referred to as “Proposals.”
- CMU seeks to select both the Software and System Integrator services as part of this RFP. Any reference to “Solution” shall mean the total combination of products and services offered by the

Vendor to achieve CMU's defined project objectives and meet the business and technical requirements set forth in the RFP.

- CMU defines "Enterprise Resource Planning," or "ERP" as a solution that includes the core HR, Finance and Procurement capabilities necessary to maintain its business operations and complete this HR and Finance Transformation effort.
- "CMU RFP Contact" is an individual who shall represent CMU with respect to defining the scope, objectives, and requirements of the Project, managing all CMU due diligence activities, and serving as point of contact for RFP communications.
- "Finalist" or "Vendor Finalist" refers to Vendors who are invited to conduct product demonstrations, after satisfactory completion of the written Proposal materials. Oral Presentations and Demonstrations may take place virtually or in person.

Section 3.5 Scope of Bid Package

This RFP contains the instructions governing the proposal to be submitted and the material to be included therein; mandatory requirements which must be met to be eligible for consideration; and other requirements to be met by each proposal.

This document, and any attachments thereto, regardless of form or medium, is an RFP related to CMU's HR and Finance ERP Software and System Integrator Selection and is intended only for use by the addressee(s) and contains proprietary and confidential, copyrighted, trademarked and/or patented or otherwise legally privileged and/or restricted information which shall be viewed and/or used by the intended recipient on behalf of the applicable Vendor(s) only and solely for the purpose set forth in this RFP.

If you are not the intended recipient of this document (or the person responsible for delivering this document to the intended recipient), you are hereby notified that any dissemination, distribution, printing or copying of this RFP, and any attachment thereto, is strictly prohibited and violation of this condition may infringe upon copyright, trademark, patent, or other laws protecting proprietary and/or intellectual property.

The information obtained in the RFP process is to be used solely for the purposes of responding to this RFP.

No news release, promotion, marketing or public announcement, or any other reference to CMU, this RFP or any program hereunder pertaining to CMU shall be made by Vendor or any third party on behalf of Vendor, indirectly or directly, without express prior written consent from CMU in each instance.

CMU may cancel, terminate and/or retract this RFP at any time, for any reason, and is not obligated to select any responding Vendor.

To be eligible for consideration, proposals must be presented in accordance with the instructions of this solicitation and within the time specified. The selected Offeror(s) are responsible for meeting all specifications and guidelines set forth herein. CMU, at its discretion, determines the criteria and process whereby proposals are evaluated and awarded. No damages shall be recoverable by any challenger due to these determinations or decisions by CMU.

The table below summarizes the full set of documents provided in the bid package, highlighting those that are to be returned as part of Proposals.

Doc. Ref.	Document Title	For Reference	Returned as Part of Proposals	Primary Responder
1.1	RFP Background and Instructions <i>(this document)</i>	X		
1.2	Master Services Agreement	X		
2.1	Use Case Response		X	Combined (SI+SW)
2.2	Pricing Approach		X	Combined (SI+SW)
2.3	Q+A Submission		X	Combined (SI+SW)
2.4	Functional Requirements		X	Combined (SI+SW)
3.1	SI Vendor Info		X	SI
3.2	Key Personnel		X	SI
4.1	SW Vendor Info		X	SW
4.2	Security Questionnaire		X	SW
4.3	Technical Requirements		X	SW
5.1	User Counts	X		
5.2	SaaS Service Level Requirements	X		
5.3	Applications Inventory	X		
5.4	Exit Services	X		
5.5.1	Governance and Project Management	X		
5.5.2	Planning and Design	X		
5.5.3	Configuration, Build, Test	X		
5.5.4	Deployment and Initial Support	X		
5.5.5	OCM and Training Services	X		
5.6	Use Case Details	X		

Section 3.6 Schedule of Activities

The overall RFP process and key dates are provided in the table below.

Event	Date
RFP Bid Package distributed	July 25, 2024
Pre-bid meeting [non-mandatory]	Friday, August 02, 2024 1:00 PM MST
Submission of Written Inquiries	August 7, 2024 11:00 AM MST
CMU to respond to Written Inquiries	August 12, 2024 EBD
Vendors submits proposal to CMU in electronic format	August 26, 2024 11:00 AM MST
Short List notification	September 10, 2024
Proposal demonstration (short listed Vendors only)	September 16 – 20, 2024
Vendor Reference Calls by CMU Additional Demonstration	September 23 – 27, 2024
CMU Review and Negotiation and Contracting Period	October November 2024
Planning Period Begins	January 2025

Non-Mandatory Pre-Bid Meeting Link

Topic: CMU 2811 Colorado Mesa University HR & Finance Software and System Integration Services RFP

Time: Aug 2, 2024 01:00 PM Mountain Time (US and Canada)

Join Zoom Meeting

<https://coloradomesa.zoom.us/j/97812647021?pwd=TLlTbFyeP7sNamOl1ZLu6q2bIDODXd.1>

Meeting ID: 978 1264 7021

Passcode: 778010

One tap mobile

+17193594580,,97812647021# US

+16699006833,,97812647021# US (San Jose)

Dial by your location

- +1 719 359 4580 US
- +1 669 900 6833 US (San Jose)
- +1 253 205 0468 US
- +1 253 215 8782 US (Tacoma)
- +1 346 248 7799 US (Houston)
- +1 669 444 9171 US
- +1 689 278 1000 US
- +1 301 715 8592 US (Washington DC)
- +1 305 224 1968 US
- +1 309 205 3325 US
- +1 312 626 6799 US (Chicago)
- +1 360 209 5623 US
- +1 386 347 5053 US

- +1 507 473 4847 US
 - +1 564 217 2000 US
 - +1 646 876 9923 US (New York)
 - +1 646 931 3860 US
- Meeting ID: 978 1264 7021
Find your local number: <https://coloradomesa.zoom.us/j/97812647021>

Section 3.7 Inquiries

Offeror(s) may make written, email inquiries concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the date and time indicated in the Schedule of Activities. Offeror(s) shall confirm successful receipt of said inquiries.

For this RFP, send all inquiries to Suzanne Ellinwood, Director of Procurement & Risk Management, at sellinwo@coloradomesa.edu.

Response to any Offeror(s)' inquiries will be published as a modification on the RMEPS website and the University Open Solicitations website in a timely manner per the Schedule of Activities. Offeror(s) should not rely on any other statements that alter any specification or other term or condition of the RFP.

Section 3.8 Addendum or Supplement to Request for Proposal

If it becomes necessary to revise any part of this RFP, an addendum notice will be posted on the RMEPS website and the University Open Solicitations website. Bidders shall not rely on any other interpretations, changes, or corrections.

Section 3.9 Written Inquiries and Responses

Any explanation desired by an Offeror regarding the meaning or interpretation of any RFP provision must be submitted in writing and clearly marked with the RFP number and title. Inquiries can be emailed to the point of contact for the RFP; it is incumbent upon the Offeror(s) to verify receipt of written inquiries. Written responses to inquiries will be provided as an addendum to be posted on the RMEPS website and the University Open Solicitations website on the date shown in Section 3.6 Schedule of Activities.

Section 3.10 Modification or Withdrawal of Proposals

Proposals may be modified or withdrawn by the Offeror(s) prior to the established submission due date and time.

Section 3.11 Proposal Submission

Proposals must be received on or before the date and time indicated in the Schedule of Activities. Bids will be accepted electronically through the RMEPS website. The Vendor Signature Form must be signed by the Offeror(s) or an officer of the Offeror legally authorized to bind the Offeror to the proposal. The Vendor Signature Form is to be included with the proposal. Proposals which are determined to be at variance with this requirement will not be accepted.

Section 3.12 Acceptance of RFP Terms

A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the signature of the Offeror(s), or an officer of the Offeror legally authorized to execute contractual obligations. A submission in response to this RFP acknowledges acceptance by the Offeror of all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and

thoroughly note any variations between its proposal and the University's RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

Section 3.13 Bid Opening

Inspection of the Offeror(s)' proposals will not be allowed until after the notice of intent to award is posted on the RMEPS website.

Section 3.14 Oral Presentations, Demonstrations, and/or Site Visits

The Evaluation Committee may conclude after the proposal evaluation that oral interviews and/or demonstrations are required to determine the successful Offeror. All Offerors may not have an opportunity to interview/present and/or give demonstrations. The presentation process will allow the Offerors to demonstrate their proposal offering, explaining, and/or clarifying any unusual or significant elements related to their proposals. Offeror's key personnel may be required to participate in a structured interview to determine their understanding of the requirements of this proposal, their authority and reporting relationships within their firm, and their management style and philosophy. Detailed notes of oral interviews/presentations and/or demonstrations may be recorded and supplemental information (such as briefing charts, etc.) may be accepted. Additional written information gathered in this manner shall not constitute replacement of proposal contents. Once oral interviews/presentations and/or demonstrations have been completed the University reserves the right to make a contract award without any further discussion with the Offerors regarding the proposals received. Any cost incidental to the oral interviews/presentations and/or demonstrations shall be borne entirely by the Offeror.

Section 3.15 Protested Solicitations and Awards

Any actual or prospective Offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the University Purchasing Manager. The protest shall be submitted in writing within seven working days after such aggrieved person knows, or should have known, of the facts giving rise thereto. [Reference Colorado Revised Statutes (CRS) Section 24-109-101 et. seq., 24-109-201 et. seq., and Colorado Procurement Rules R-24-109-101 through R-24-109-206.] With regard to the emphasized language above, it is important for Offerors to note that a challenge to the solicitation's requirements or specifications should be made within 7 days of when the protested item is known. In other words, if you believe that the solicitation contains a requirement you want to protest, the protest should be submitted within the 7-day time period, even if that means it is filed during the time the solicitation is still open. As noted in the paragraph above, announcement of the apparent winning Offeror will be made via a posting on the RMEPS website. The requirement for timely submission of any protest (7 working days) will begin on the first working day following the posting of the award notice on the RMEPS website.

Section 3.16 Confidential/Proprietary Information

Any restrictions on the use or inspection of material contained within the proposal shall be clearly stated in the proposal itself. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary. **Confidential/proprietary information must be readily identified, marked, and separately packaged from the rest of the proposal.** Co-mingling of confidential/proprietary and other information is NOT acceptable. Neither a proposal in its entirety, nor proposal price information will be considered confidential/proprietary. Any information that will be included in any resulting contract cannot be considered confidential.

Section 3.17 RFP Response Material Ownership

All material submitted regarding this RFP becomes the property of the University. Proposals may be reviewed by any person after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of § 24-72-201 et.seq. CRS, as amended, Public (open) Records.

Section 3.18 Proposal Prices

Estimated proposal prices are not acceptable. Proposal prices will be considered to be your best and final offer, unless otherwise stated in the RFP. The proposal price will be considered in determining the apparent successful Offeror.

Section 3.19 Discussion with Responsible Offerors and Revisions to Proposal

Discussions may be conducted with responsible Offerors who submit proposals determined to be reasonably susceptible of being selected for award; for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirement. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussions and revision of proposals, and such revisions may be permitted after submissions and prior to award, for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors. The University reserves the right to hold discussions with Offerors who have been found to be in the competitive range, such discussions may result in the University conducting Best & Final Offers.

Section 3.20 Selection of Proposal

As described within the RFP in Part 2 , an Evaluation Committee will review and score offers submitted, and make a recommendation for award. The selection will be for award to the responsible Offeror whose proposal is determined to be most advantageous to the University. The Purchasing Department, after review and approval of the evaluation committee's written recommendation, will notify all Offerors via a posting on the RMEPS website of the results of the RFP evaluation. The posting will be an announcement of the "Notice of Intent to Make an Award" will name the apparent successful Offeror.

Section 3.21 Award of Contract

The award will be made to the responsive and responsible Offeror whose proposal, conforming to the RFP, will be the most advantageous to the University, price and other factors considered. A contract must be completed and signed by all parties concerned. In the event the parties are unable to enter into a contract, the University may elect to cancel the "Notice of Intent to Make an Award" letter and make the award to the next most responsible Offeror.

Section 3.22 Acceptance of Proposal Content

The contents of the proposal (including people specified to implement the project) of the successful Offeror will become contractual obligations if acquisition action ensues. Failure of the successful Offeror to accept these obligations in a contract may result in cancellation of the award and such Offeror may be removed from future solicitations. Under these conditions, the University reserves the right to enter into negotiations with the next ranking bidder on the same terms and conditions as set forth in the RFP.

Section 3.23 Standard Contract

The successful bidder will enter into a contract with the University. The state contract contains certain required provisions for doing business with the state of Colorado, labeled "Special Provisions." The Special Provisions are required to be contained in every state contract without modification or exception. The Offeror shall include with its proposal a separate page entitled "Exceptions to Contract Terms," setting forth in detail all

objections and exceptions it may have to any other terms and provisions contained in the special provisions, and failing such, shall be deemed to have accepted such terms and provisions. Failure to accept the University's standard contract provisions may result in cancellation of the award. The state contract, including the Special Provisions, is attached electronically as a separate PDF document.

Section 3.24 RFP Cancellation

The University reserves the right to cancel this RFP at any time, without penalty.

Section 3.25 Ownership of Contract Products/Services

Proposals, upon established opening time, become the property of the University. All products/services produced in response to the contract resulting from this RFP will be the sole property of the University unless otherwise noted in the RFP. The contents of the successful Offeror's proposal will become contractual obligations.

Section 3.26 Incurring Costs

The University is not liable for any cost incurred by Offerors prior to issuance of a legally executed contract. No proprietary interest of any nature shall accrue until a contract is awarded and signed by all concerned parties.

Section 3.27 Non-Discrimination

The Offeror shall comply with all applicable state and federal laws, rules and regulations involving nondiscrimination on the basis of race, color, religion, national origin, age, or sex.

Section 3.28 Rejection of Proposals

The University reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received, and to accept any portion of a proposal or all items proposed if deemed in the best interest of the University.

Section 3.29 Parent Company

If an Offeror is owned or controlled by a parent company, the main office address and parent company's tax identification number shall be provided in the proposal. The tax identification number provided must be that of the Offeror responding to the RFP.

Section 3.30 News Releases

News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by the University.

Section 3.31 Contract Cancellation

The University reserves the right to cancel, for cause, any contract resulting from this RFP by providing timely written notice to the offeror.

Section 3.32 Certification of Independent Price Determination

- A. By submission of this proposal, each Offeror, and in the case of a joint proposal, each party thereto, certified as to its own organization, that, in connection with this procurement:

1. The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor;
 2. Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, directly or indirectly to any other Offeror or to any Competitor; and
 3. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
- B. Each person signing the Vendor Signature Form of this proposal certified that:
1. They are the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein and that they have not participated, and will not participate, in any action contrary to (A)(1) through (A)(3) above; or
 2. They are not the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein but that they have been authorized in writing to act as agent for the people responsible for such decision in certifying that such people have not participated, and will not participate, in any action contrary to (A)(1) through (A)(3) above, and as their agent does hereby so certify; and they have not participated, and will not participate, in any action contrary to (A)(1) through (A)(3) above.
- C. A proposal will not be considered for an award where (A)(1), (A)(3), or (2) above has been deleted or modified. Where (A)(2) above has been deleted or modified, the proposal will not be considered for award unless the Offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or their designee, determines that such disclosure was not made for the purpose of restricting competition.

Section 3.33 Conflicts of Interest

The holding of public office or employment is a public trust. A public officer or employee whose conduct departs from their fiduciary duty is liable to the people of the state. Rules of conduct for public officers and state employees:

- A. Proof beyond a reasonable doubt of commission of any act enumerated in this section is proof that the actor has breached their fiduciary duty.
- B. A public officer or a state employee shall not:
 1. Engage in a substantial financial transaction for their private business purposes with a person whom they inspect, regulate, or supervise in the course of their official duties;
 2. Assist any person for a fee or other compensation in obtaining any contract, claim, license, or other economic benefit from their agency;
 3. Assist any person for a contingent fee in obtaining any contract, claim, license, or other economic benefit from any state agency, or
 4. Perform an official act directly and substantially affecting its economic benefit a business or other undertaking in which they either have a substantial financial interest or is engaged as counsel, consultant, representative, or agent.
- C. A head of a principal department or a member of a quasi-judicial or rule-making agency may perform an official act notwithstanding paragraph (4) of subsection (B) of this section if their participation is necessary to the administration of a statute and if they comply with the voluntary disclosure procedures under CRS section 24-18-110.
- D. Paragraph (3) of subsection (B) of this section does not apply to a member of a board, commission, council, or committee if they comply with the voluntary disclosure procedures under CRS 24-18-110 and if they are not a full-time state employee. Reference CRS 24-18-108.

Section 3.34 Taxes

Colorado Mesa University, as purchaser, is exempt from all federal excise taxes under Chapter 32 of the Internal Revenue Code (Registration No. 84-6000546) and from all state government use taxes (Ref. Colorado Revised Statutes Chapter 39-26.114(a)). Our Colorado State Sales Tax Exemption Number is 98-03693. The seller is hereby notified that when materials are purchased in certain political subdivisions the seller may be required to pay sales tax even though the ultimate product or service is provided to the state of Colorado. This sales tax will not be reimbursed by the state.

Section 3.35 Assignment and Delegation

Except for assignment of antitrust claims, neither party to any resulting contract may assign or delegate any portion of the agreement without the prior written consent of the other party.

Section 3.36 Availability of Funds

Financial obligations of the University payable after the current fiscal year are contingent upon funds for that purpose being appropriated, budgeted, and otherwise made available. In the event funds are not appropriated, any resulting contract will become null and void, without penalty to the University and the state of Colorado.

Section 3.37 Bid Bonds/Security

If the RFP so states, a bid security in an amount equal to 5% of your proposal shall be furnished if your proposal exceeds \$50,000. If the specifications so state, it may be required for projects of less than \$50,000. Not required for this Bid.

Section 3.38 Contractor's Performance Bond

Does not apply.

Section 3.39 Standard Insurance Requirements

- A. The Offeror shall obtain, and maintain at all times during the term of this contract, insurance in the following kinds and amounts:
 1. Workers' Compensation Insurance as required by state statute, and Employer's Liability Insurance covering all of the offeror's employees acting within the course and scope of their employment.
 2. Commercial General Liability Insurance written on ISO occurrence form CG 00 01 10/93 or equivalent, covering premises operations, fire damage, independent offerors, products and completed operations, blanket contractual liability, personal injury, and advertising liability with minimum limits as follows:
 - i. \$1,000,000 each occurrence;
 - ii. \$2,000,000 general aggregate;
 - iii. \$2,000,000 products and completed operations aggregate; and
 - iv. \$50,000 any one fire.
 - v. Automobile Liability Insurance covering any auto (including owned, hired, and non-owned autos) with a minimum limit as follows: \$1,000,000 each accident combined single limit.
- B. Colorado Mesa University shall be named as additional insured on the Commercial General Liability and Automobile Liability Insurance policies (leases and construction contracts will require the additional insured coverage for completed operations on endorsements CG 2010 11/85, CG 2037, or

equivalent). Coverage required of the contract will be primary over any insurance or self-insurance program carried by the University.

- C. The Insurance shall include provisions preventing cancellation or non-renewal without at least 30 days prior notice to the University.
- D. The offeror will require all insurance policies in any way related to the contract and secured and maintained by the offeror to include clauses stating that each carrier will waive all rights of recovery, under subrogation or otherwise, against the University, its agencies, institutions, organizations, officers, agents, employees, and volunteers.
- E. All policies evidencing the insurance coverages required hereunder shall be issued by insurance companies satisfactory to the University.
- F. The offeror shall provide certificates showing insurance coverage required by this contract to the University within seven business days of the effective date of the contract, but in no event later than the commencement of the services or delivery of the goods under the contract. No later than 15 days prior to the expiration date of any such coverage, the offeror shall deliver the state certificates of insurance evidencing renewals thereof. At any time during the term of this contract, the University may request in writing, and the offeror shall thereupon within 10 days supply to the University, evidence satisfactory to the University of compliance with the provisions of this section.
- G. Notwithstanding subsection A of this section, if the offeror is a “public entity” within the meaning of the Colorado Governmental Immunity Act CRS 24-10-101, et seq., as amended (“Act”), the offeror shall at all times during the term of this contract maintain only such liability insurance, by commercial policy or self-insurance, as is necessary to meet its liabilities under the Act. Upon request by the University, the contractor shall show proof of such insurance satisfactory to the University.

Section 3.40 Independent Contractor Clause

All personal service contracts must contain the following clause:

“The contractor shall perform its duties hereunder as an independent contractor and not as an employee. Neither the contractor nor any agent or employee of the contractor shall be or shall be deemed to be an agent or employee of the state. Contractor shall pay when due all required employment taxes and income tax withholding, shall provide and keep in force worker’s compensation (and show proof of such insurance) and unemployment compensation insurance in the amounts required by law, and shall be solely responsible for the acts of the contractor, its employees, and agents.”

Section 3.41 Indemnification

To the extent authorized by law, the contractor shall indemnify, save and hold harmless the University, its employees and agents, against any and all claims, damages, liability and court awards including costs, expenses, and attorney fees incurred as a result of any act or omission by the contractor or its employees, agents, subcontractors, or assignees pursuant to the terms of the contract resulting from this RFP.

Section 3.42 Venue

The laws of the state of Colorado, U.S.A. shall govern in connection with the formation, performance, and the legal enforcement of any resulting contract. Further, Title 24, C.R.S. as amended, Article 101 through 112 and Rules adopted to implement the statutes govern this procurement.

PART 4 – PROPOSAL RESPONSE CHECKLIST

Offeror(s) must pair to submit a single, combined response for Software (SW) and System Integration (SI) services. Please use the Checklist below to confirm you have completed all necessary materials and are submitting all attachments. Proposals that do not follow this checklist may be deemed non-responsive.

Attachment	Format	Guidelines	Responder
Proposal Overview	PDF	<input type="checkbox"/> Provide a concise overview of your proposal, highlighting any differentiating factors CMU should consider during evaluation <input type="checkbox"/> Keep responses brief, with this overview no more than 15 pages total <input type="checkbox"/> Designate a primary contact for both the Software and System Integrator <input type="checkbox"/> Use this naming convention throughout your proposal: “[Name of Attachment] for [Name of SW Vendor] and [Name of SI Vendor]”	Combined (SI+SW)
2.1 Use Case Response	Excel	<input type="checkbox"/> Respond to selected CMU use cases for Finance, HR, and Procurement	Combined (SI+SW)
2.2 Pricing Approach	Excel	<input type="checkbox"/> Provide proposed pricing information, using the template provided	Combined (SI+SW)
2.3 Q&A Submission	Excel	<input type="checkbox"/> Submit written questions prior to RFP close/submission. If you do not have questions, you do not need to submit this item.	Combined (SI+SW)
2.4 Functional Requirements	Excel	<input type="checkbox"/> Respond to CMU functional requirements for Finance, HR, and Procurement	Combined (SI+SW)
3.1 SI Vendor Info	Excel	<input type="checkbox"/> Provide basic information about the SI Vendor proposed	SI
3.2 Key Personnel	PDF	<input type="checkbox"/> Detail the individuals proposed for this engagement and their qualifications	SI
4.1 SW Vendor Info	Excel	<input type="checkbox"/> Provide basic information about the SW Vendor proposed	SW
4.2 Security Questionnaire	Excel	<input type="checkbox"/> Respond to CMU security requirements including data storage, security patching and cybersecurity.	SW
4.3 Technical Requirements	Excel	<input type="checkbox"/> Respond to CMU technical requirements for enterprise-wide solutions	SW

VENDOR SIGNATURE FORM

CMU 2811

Colorado Mesa University HR & Finance Software and System Integration Services RFP

Proposals Due: August 26, 2024 Time: 11:00 am MST

Bids will be accepted electronically through the Rocky Mountain ePurchasing System (RMEPS) website at <https://www.rockymountainbidsystem.com>. The RMEPS website offers both free and paid registration options that allow for full access of the solicitation documents and for electronic submission of proposals. [Note: Free registration on the site may take up to 24 hours to process; plan registration to allow time for on-time bid submission.] Colorado Mesa University does not have access or control of the vendor side of the RMEPS website, contact RMEPS directly to resolve any issues encountered prior to response deadline (800) 835-4603.

The Offeror herein noted has carefully examined all components, instructions and requirements of this RFP and proposes to furnish the services described herein. The undersigned hereby agrees to provide HR & Finance Software and System Integration Services on behalf of Colorado Mesa University in accordance with the specifications, requirements, terms, and conditions contained herein for the rates quoted. The undersigned certifies that all representations, certifications, and statements within its proposal are true and accurate as of the date of the proposal submission. The person signing this Vendor Signature Form certifies that they are a duly authorized officer for the Offeror, and that the information and any materials enclosed with this proposal represent the capability of the company to provide the services described in the quote.

This Vendor Signature Form page **MUST** be signed for proposal to be valid.

COMPLETE THE FOLLOWING:

Federal Employer ID No. _____ Date: _____

Company Name: _____

Authorized Signature: _____

Typed/Printed Name: _____

Title: _____

Address: _____

City/State/Zip: _____

Phone No.: _____

Contact for Clarifications:

Name: _____

Title: _____

Phone No.: _____

Email: _____

Offeror Acknowledges Receipt of Addendum No. _____, _____, _____, _____ (Addendums MUST be acknowledged)