



## **REQUEST FOR PROPOSAL (“RFP”) #5053ME**

### **Addendum 1**

### **Project Management Services for Workday Implementation**

**RFP Issued Date: July 23, 2025**

**Questions due by: 07/30/2025 by 2:00pm EDT via email with the RFP #5053ME in the subject line**

**Proposal Due Date /Time: 08/07/2025 by 2:00pm EDT via email with the RFP #5053ME in the subject line**

**Contact:**

**Michael Eames**

Purchasing Manager

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**Proposals must be received by the due date/time specified above. Proposals received after the due date/time will be returned unopened to the supplier**

Please refer to the attached sheets for Instructions & Information. Proposals must be submitted on the form(s) provided and signed by an authorized representative in ink in the proper spaces. Vendors are cautioned to read this entire document carefully and to prepare and submit their Proposal providing all requested information in accordance with the terms and conditions set forth herein.

## Bid 5053ME Addendum 1

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1. *Can you confirm if the assessment/evaluation will be based on the Project Manager's experience as opposed to the proposing firm?*
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Yes. Evaluation will be based solely on the qualifications, experience, and fit of the proposed Project Manager. The contract will be awarded for the services of a specific individual, regardless of whether they are submitted by a firm or as an independent contractor. Should the proposed Project Manager become unavailable or leave the firm during the engagement, the contract will be subject to termination at CSU's discretion.

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2. *As the RFP states a hybrid working model, can you confirm if weekly attendance is required or if the on-site attendance will only be required during key elements of the project?*
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We are open to the expert guidance of the PMO to help dictate the hybrids schedule, we believe it would be ~ 60% remote, 40% on-site for key meetings and relationship building.

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3. *What is the initial contract duration?*
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The initial contract term will align with the duration of Phase 1 of the Workday implementation. While the precise timeline will be finalized during contracting, CSU currently anticipates Phase 1 to run from January 2026 through July 2027. The University reserves the right to renew the contract for up to three additional one-year terms to support future phases, including the Workday Student implementation.

The contract is specifically tied to the individual proposed as Project Manager. A change in that individual's availability may affect the continuation of the contract.

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4. *What Phase 0 work has been completed to date?*
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To date, CSU has completed a Technology Transformation Assessment in partnership with Deloitte, which included high-level planning, timeline development, and readiness evaluation. However, most Phase 0 activities—such as detailed discovery, integration

planning, and resourcing—have not yet begun. CSU anticipates initiating this work in collaboration with the selected systems integrator, guided by their methodology and recommendations.

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5. *Given CSU's 20+ years of PeopleSoft customizations and the custom CampusNet Java application, what level of business process re-engineering is CSU expecting versus maintaining current customized processes in Workday? (Attachment E, Page 17)*
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CSU intends to take full advantage of Workday's standard functionality and modern best practices. The University expects a significant level of business process re-engineering as part of this transformation. While we recognize that certain operational requirements are unique, our objective is to minimize customization and leverage Workday's configurable tools wherever possible to improve efficiency, standardization, and long-term maintainability.

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6. *How does CSU envision the successful partner's role in balancing standardization objectives with the University's unique operational requirements, particularly for student-facing processes? (Attachment F, Page 18)*
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The Project Manager is expected to play a strategic role in helping CSU balance institutional objectives around process standardization with the need to support mission-critical, student-facing operations. This includes facilitating discussions between functional stakeholders and the systems integrator to evaluate trade-offs, advocating for adoption of Workday best practices, and identifying when exceptions may be warranted to preserve essential student service functions. The Project Manager will be instrumental in guiding CSU through change while aligning with Workday's capabilities.

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7. *How does CSU envision the successful partner's role in governing the performance of the systems integrator (Workday in this case), particularly regarding deliverable quality and timeline adherence? (Attachment F, Page 18)*
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The systems integrator has not yet been selected. The Project Manager will be expected to serve as CSU's strategic lead in overseeing the systems integrator once engaged. This

includes monitoring project timelines, deliverable quality, and issue resolution; facilitating accountability through clear documentation and communication; and escalating concerns to CSU leadership as needed. While formal contract management will remain with CSU, the Project Manager will be a key advisor and liaison to ensure the integrator meets performance expectations.

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*8. Given the understood complexities of replacing CampusNet with Workday Student, has preliminary analysis has been completed regarding data migration requirements and custom functionality gaps? Will this be a part of the successful partner's scope? (Attachment E, Page 17)*

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CSU recognizes the complexity of replacing CampusNet with Workday Student and acknowledges that significant planning and analysis will be required. While we are aware of the scope of effort involved, preliminary analysis related to data migration and functionality gaps has not yet been completed. This work will begin in coordination with the selected systems integrator. The Project Manager will be expected to support and coordinate these activities as part of their strategic oversight responsibilities.

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*9. Has a duration / timeline for Phase 1 and Phase 2 been identified or will this be part of the strategic work indicated in the RFP? (Attachment E, Page 17)*

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While the final timeline will be refined with the selected systems integrator, CSU is currently operating from a draft schedule developed during our Technology Transformation Assessment with Deloitte.

**Phase 1 (HCM and Finance):**

Readiness begins: **January 2026** (3 months)

Implementation begins: **April 2026** (15 months)

Target go-live: **July 1, 2027**

**Phase 2 (Workday Student):**

Readiness begins: **July 2027** (3 months)

Implementation begins: **October 2027** (24 months)

Full functionality live: **October 1, 2029**, with staggered releases throughout implementation

These timelines provide the current working framework but remain subject to adjustment based on integrator input and CSU's evolving needs.

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*10. Is the intent for the successful partner to manage stakeholders on the CSU side as well as the Workday partners, or is the scope of influence limited to the CSU stakeholders? (Attachment E, Page 17)*

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The Project Manager's primary responsibility is to manage stakeholders on the CSU side. However, they will also serve as CSU's point of coordination with the systems integrator and other external partners. This includes facilitating alignment, ensuring clear communication across parties, and supporting accountability for deliverables and timelines. While formal authority will rest with CSU leadership, the Project Manager is expected to actively engage with all stakeholders to drive project success.

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*11. Who are the stakeholders (titles/roles, not names) that CSU expects to be a part of strategic planning during the initial Phase 1 Design? (Attachment E, Page 17)*

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Strategic planning during the initial Phase 1 Design will involve key stakeholders from across the institution, including but not limited to:

- Chief Information Officer (CIO)
- Chief Financial Officer (CFO)
- Chief Human Resources Officer (CHRO)
- Provost and Academic Affairs representatives
- Senior leadership from Enrollment Services and Institutional Research
- Business process owners and subject matter experts from Finance, HR, and IT
- Project governance bodies and steering committee members

These stakeholders will provide leadership, input, and decision-making support throughout the planning process.

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*12. What types of financial oversight is CSU looking to the Project Manager to provide? Is this referring to deployment budget, or anything else?  
(Attachment E, Page 17)*

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The Project Manager is expected to provide oversight of the overall deployment budget, including tracking actuals against forecasts, identifying potential risks to financial performance, and advising CSU leadership on cost implications of scope or timeline changes. This includes monitoring expenditures related to systems integrator services, internal resource allocations, and other third-party vendors. The Project Manager will not serve as the fiscal authority but will be responsible for supporting CSU in maintaining financial discipline throughout the project.

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*13. What percentage of the Project Manager's time is expected to be spent onsite in Cleveland? <50%, <50% , during critical milestones/activities, etc.? (Attachment F - Scope of Services, Page 18)*

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We are open to the expert guidance of the PMO, we believe it would be closer to a 60% remote, 40% on-site for key meetings and relationship building.

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*14. Is the Project Manager expected to be the lead of all change management related activities (e.g., training, change communications, user readiness activities) in addition to project management activities?  
(Attachment F - Key Requirements, Page 18)*

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While the Project Manager is expected to support change management efforts—particularly in coordinating activities, tracking progress, and integrating change readiness into the overall project plan—they will not serve as the lead for change management. Dedicated change management leads will be assigned on both the CSU side and the systems integrator side. The Project Manager will collaborate closely with these leads to ensure alignment and effective execution of training, communications, and user readiness initiatives.

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*15. Has any work been done to identify integrations that will need to be developed / setup as part of this deployment? If so, is a list of desired integrations available to share? (Attachment F - Workday SKU List)*

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The following table represents a preliminary inventory of current third-party systems that may require integration with Workday. This list is not final and is subject to change. CSU anticipates that some of these systems will be sunset or replaced, while others will require integration. Additionally, further integration needs may be identified during discovery and planning sessions with the selected systems integrator.

<b>Software/System</b>	<b>Purpose</b>
ACT	Testing Scores
Adobe creative cloud	Adobe Cloud
Adobe Sign	Adobe Sign
ADP*	Payroll Taxes
Advocate	Managing student conduct, Title IX cases, and behavioral interventions.
AIM - Accessibility Information Management	Disability services - manage accommodations
ALEKS	Math: Adaptive learning and assessment platform
Alma	Library System (replacing Sierra)
APEX – COE*	College of Education Database
Azure Active Directory	Active Directory
Bank of America	P Card System
Blackboard	LMS - Learning Management System
B-line	Medical system storage for COH
Blue	Course evaluation
Castlight Health	Working Well
Cayuse	Grants - Pre-Award and Human Ethics
Century Link	all-in-one (student help desk) telephone system
College Scheduler	Streamline the academic planning, scheduling, and registration processes
Dude solutions	Facilities ticketing system
EMS - Event Management System	room scheduling for Conference Services and Registrar
Equifax	ACA Compliance file
Exxat	all-in-one Education Management Platform for Health Sciences
Federal Reserve	Banking Information
Follett	Book store
GMAT	Testing Scores
GRE	Testing Scores
Handshake*	Career networking platform connecting students with job and internship opportunities.
Huntington Bank	Bank
Impact Solutions	Employee Assistance Program

Interfolio*	Faculty Profile, Faculty Activity, Tenure Tracking
Keypath	Online Curriculum Vendor
Keyscan Aurora	Door Access
LDAP	local AD
Learning stream	Continuing Education Software
Jaggaer*	eProcurement
Medical Mutual	Health Plan file
Met Life	Dental Plan file
MIP*	Accounting for the Advancement Foundation
Modern Campus Catalog (Acalog)	Catalog management system that integrates with CS
Modern Campus Curriculum (Curriculog)	Online curriculum management system that automates the process of curriculum approval.
MyEmma	Marketing
OnBase Document Management	Document management
OPERS/STRS	Union Contribution files (multiple unions)
Paciolan	Athletics feed
Parchment*	Transcript send and receive
Payment Works*	Vendor payment management
PowerFAIDS*	Financial Aid
Presence	Student Life - Student groups
Protexting	SMS and MMS platform (Waitlists, Class Change, ++)
Pure	Faculty Profile for Research for Library
Qualtrix	Research
RAVE	Alert Systems
Rec Auto	Recreation Center management
SAT	Testing Scores
Securian	Life Insurance file
Sedgwick	FMLA file
Selective Service	Needed for In-State Tuition Requirements
servicenow	ITIL - IS&T changes, incidents, service requests (not projects)
Slate (Adm)	Admissions - separate instance of Slate
Slate (Advancement)	Employee Import into Slate Advancement
splunk	IS&T logs, alerts
Starfish*	Advising
Surency	FSA and COBRA file
T2 Systems	Parking
Teamworks	App for Athletics - can see course and practice schedule in one place, plus other functionality



Terradotta	International Student System
StarRez / The Housing Director	Housing and Resident Meal Plans
TOEFL	Testing Scores
Transact Campus Transaction System Enterprise (TSE)	ID Card Admin, POS, Meal Plans
Transact Payments	ePayment, Payment Plans
UHC	Student Health Insurance & Waivers
UKG*	Time Keeping
Unum	Long Term Disability, Short Term Disability, Accident, Pay Remittance
Vector Solutions (Scenario Learning)*	employee training
VSP	Vision Plan file
Webcheckout fma	Film school

**\*Items may be sunset and replaced, partially sunset and replaced with integration(s) or kept as is and integrated, to be determined. If sunset, there may be additional integrations from systems that were integrated directly with the application, such as punchout vendors with Jaggaer.**

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*16. Can you provide additional detail on which deployment methodology CSU and Workday are using (e.g., Launch, Your Way, etc.)? (Attachment E, Page 17)*

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The deployment methodology will be determined in coordination with the selected systems integrator. CSU has not yet committed to a specific methodology (e.g., Workday Launch, Your Way). The final approach will be selected based on alignment with project goals, timeline, scope, and the integrator's recommended best practices.

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*17. What issues/goals/objectives do you hope to accomplish with your ERP Transformation?*

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CSU's ERP transformation is driven by a strategic goal to modernize and streamline core administrative functions, improve data accessibility and reporting, enhance user experience, and reduce technical debt. Key objectives include:

- Replacing legacy systems with a unified cloud-based platform

- Aligning business processes with industry and Workday best practices
- Increasing operational efficiency and transparency
- Supporting data-informed decision-making through integrated analytics
- Improving service delivery to students, faculty, and staff
- Enabling scalability and flexibility for future institutional needs

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*18. Please describe the level of excitement at CSU for this project?*

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There is a high level of enthusiasm across CSU for the Workday implementation. University leadership and key stakeholders recognize this as a transformational initiative with the potential to significantly improve institutional operations and user experience. While there is also a healthy awareness of the complexity and effort required, the project is seen as a strategic investment in CSU's future, with strong support from executive leadership.

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*19. Is there known resistance to the project that would impact the success of the transformation?*

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As with any large-scale transformation, some degree of change resistance is anticipated. CSU has a long history with highly customized legacy systems, which may create initial hesitation among some users. However, the University is proactively addressing this through a comprehensive change management strategy, strong executive sponsorship, and ongoing stakeholder engagement. While challenges are expected, no institutional resistance has been identified that would materially impact the success of the project.

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*20. What is CSU's internal resourcing strategy? How many internal FTEs will be assigned to the project (by functional area and technical roles)?*

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CSU is currently developing its internal staffing plan and will finalize resourcing in coordination with the selected systems integrator. We anticipate aligning with a "two-in-a-box" model, where CSU staff partner with their systems integrator counterparts across functional and technical workstreams. The University is actively exploring options to ensure sufficient staffing, including backfilling key roles and supplementing internal capacity with consultants where appropriate. Our goal is to maintain project continuity and operational support throughout the implementation.

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*21. Will the selected Project Manager have direct access to CSU executive leadership (e.g., CIO, CFO, CHRO) for escalation and alignment?*

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Yes. The Project Manager will have direct access to CSU executive leadership, including the CIO, CFO, and CHRO, as well as other senior stakeholders as appropriate. This access is essential for escalation, alignment, and decision-making throughout the project lifecycle. The Project Manager will also participate in governance meetings and serve as a key liaison between the project team and executive leadership.

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*22. Please describe existing Project Management Office capabilities internal to CSU.*

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CSU does not currently have a centralized Project Management Office (PMO) supporting enterprise systems. While various departments and IT teams manage projects locally, the University is in the early stages of formalizing a more centralized and structured PMO approach. The Project Manager will play a key role in helping to establish and mature PMO capabilities related to the Workday implementation, including governance, reporting standards, and project coordination frameworks.

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*23. Will this role function as the Executive Program Director responsible for the Program level execution?*

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Yes

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*24. Please share what 3<sup>rd</sup> Party Vendors have already been contracted with as a part of this program.*

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CSU has selected Workday as its ERP platform; however, a contract has not yet been executed. Deloitte supported the University's initial Technology Transformation Assessment, which informed CSU's readiness planning and preliminary timeline development, but they are not engaged in the implementation. No systems integrator has been selected at this time. Additional third-party vendors may be engaged as the program progresses.

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*25. What is the Program Portfolio (other projects related or dependent on these initiatives)? Example: System Decommissioning*

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Identity and Access Management, Data Warehouse, Current PeopleSoft sustainability, System Decommissioning.

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*26. Is there a PMO Budget that should be considered for this proposal?*

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We do not have a set budget for this RFP.

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*27. Can CSU confirm whether travel costs should be included in the proposed rate or submitted as reimbursable expenses?*

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Travel should be considered the responsibility of the PMO, but we are open to discussion.

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*28. Will CSU accept proposals based on a time-and-materials model, or is a fixed-fee proposal preferred?*

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CSU would prefer a fixed-fee proposal to assist with project cost estimation but are open to evaluating any proposal.

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*29. For Attachment I – Professional Services Agreement, are there any non-negotiable clauses the proposer should be aware of?*

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Proposers should review Ohio Revised Code Section 9.27 and CSU's list of non-negotiable terms, available at:

[https://www.csuohio.edu/sites/default/files/TERMS\\_CSU\\_CANNOT\\_AGREE\\_TO\\_DUE\\_TO\\_STATE\\_LAW.pdf](https://www.csuohio.edu/sites/default/files/TERMS_CSU_CANNOT_AGREE_TO_DUE_TO_STATE_LAW.pdf)

If there are specific clauses the proposer would like to inquire about, CSU welcomes those questions for consideration. However, provisions in conflict with Ohio law cannot be modified.

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*30. Are there specific insurance carriers or coverage requirements CSU prefers for professional liability beyond what is already stated in the PSA?*

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CSU does not have additional requirements beyond those stated in the Professional Services Agreement. Proposers should refer to the PSA for insurance expectations.