Cleveland State University

REQUEST FOR PROPOSAL ("RFP") #5049ME

FOR: WORKDAY SYSTEM INTEGRATOR SERVICES

AS PER THE SPECIFICATIONS LISTED HEREIN

RFP Issued Date: June 5, 2025

ADDENDUM #1

Summary of Vendor Discovery Meeting Insights

Questions due by: June 12, 2025 by <u>2:00pm EDT</u> via email with the RFP #5049ME in the subject line

Proposal Due Date /Time: July 1, 2025 by <u>2:00pm EDT</u> via email with the RFP #5049ME in the subject line

Contact:
Michael Eames
Purchasing Manager
<u>bids@csuohio.edu</u>

<u>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</u>

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.

RFP 5049ME Addendum #1 – Summary of Vendor Discovery Meeting Insights

1. What readiness work has your team completed?

CSU has made significant progress in its readiness efforts. Several departments have already outlined their business processes, and a governance structure has been established, though it may require further refinement. A senior leadership group meets biweekly to provide oversight, and an advisory committee with representatives from each cabinet member supports decision-making. Additionally, a roadmap was developed with the help of Deloitte, which included a review of our business process maturity. Communication and stakeholder engagement are ongoing to ensure the initiative is recognized as a university-wide effort rather than solely an IT project.

Additional Context:

CSU would like to lean on the systems integrator to ensure that the governance structure is appropriate and adequate for the scale and complexity of this transformation. The university is committed to creating governance structures that will lead to the best possible outcomes.

2. What is the expectation around retaining or sunsetting third-party systems?

There is a strong preference to reduce the number of third-party systems and consolidate functionality into Workday wherever feasible. However, CSU recognizes that some third-party tools may offer strategic or critical differentiating features that Workday does not yet support. As such, CSU will need assistance in evaluating which third-party systems can be sunset and which are necessary to retain. For those systems that can potentially be retired, CSU may also require help in presenting the evaluation to leadership to determine whether the benefits of maintaining and integrating the system justify the additional cost.

Additional Context:

We are currently expecting to sunset the following third-party systems:

- PeopleAdmin
- UKG
- Vector Solutions
- Jaggaer

We are currently expecting to keep and integrate the following third-party systems:

- Slate (multiple instances)
- Transact Payments
- Cayuse

Any system not listed above is still being reviewed. In many of the cases, there needs to be a review of the functionality of Workday before a clear decision can be made.

3. How are you addressing change management, especially with system consolidation?

Change management is a key focus area for CSU. The institution is looking to its systems integrator (SI) for guidance on strategy, staffing, and execution. Recognizing the cultural and operational shifts required, CSU is actively recruiting staff with ERP cloud experience. The current team includes a mix of institutional knowledge and new perspectives, and there is a strong appetite for change among the remaining staff.

> #### *Additional Context:*

Please include your approach to change management and what differentiates your methodology. We want to hear how you will help us navigate the cultural and operational shifts required for success, and how you will ensure that our institution is fully supported throughout the transition. Your response should outline how you will engage stakeholders, build buy-in, and guide our team through the process to ensure a successful implementation.

4. What is the scope of your continuing education programs?

Continuing education at CSU operates in a separate system called Learning Stream, which is not integrated with PeopleSoft. Payments for these programs are processed through Transact, which will remain in place. The overlap with Workday is expected to be minimal and primarily financial in nature.

5. Are there specific integration needs for HCM systems like UKG?

CSU aims to sunset systems like UKG unless they provide critical differentiation. The overarching goal is to consolidate systems and reduce costs. However, certain tools such as Slate CRM are expected to be retained due to their strategic importance.

6. Are you planning a compensation study or other HR initiatives during implementation?

At this time, CSU does not have a compensation study planned. However, the institution is open to recommendations from the systems integrator. Vendors are encouraged to identify any missing scope items and suggest additions.

7. Are there other critical initiatives or dependencies that could impact the timeline?

CSU is currently managing three major initiatives: ERP transformation, data warehouse development, and identity/access management. Additionally, a fourth project, Stellic, is underway. The timeline provided is a draft intended to standardize vendor responses, but CSU is open to alternative timelines if they are supported by experience and rationale.

> #### *Additional Context:*

The current Stellic contract is a three-year contract.

8. Are there specific use cases for Workday Prism?

CSU has not yet defined a comprehensive set of use cases for Workday Prism. However, the institution expects the selected vendor to work closely with business units to identify which reports need to be available at go-live, as well as what data should be included in Prism from the outset. CSU is relying on the vendor to guide these decisions and help ensure that the implementation delivers immediate value, supports strategic decision-making, and sets the foundation for long-term success.

Additional Context:

CSU does have one clearly identified use case: We will need Prism to integrate student data from PeopleSoft Campus Solutions before we go live with Workday Student.

9. Have you started preparing your data for migration?

Data preparation has not yet begun. CSU is aware of the need for data cleanup and business process changes but has intentionally delayed some of this work until the software and systems integrator are selected to avoid unnecessary rework.

10. How important is collaboration with other Ohio institutions during implementation?

Collaboration with other Ohio institutions is considered important. CSU participates in regional CIO and director groups and is open to shared services or strategic partnerships. Given staffing and resource constraints, CSU values vendors who can help fill gaps and support the internal team.