

	Request for Proposals Amendment 1	Solicitation Number: USC-RFP-3671-AS-Rebid
		Date Issued: January 13, 2021
		Procurement Officer: Ashley Kennedy-Shell
		Phone: 803-777-4115
		E-Mail Address: abk@mailbox.sc.edu
		Mailing Address: 1600 Hampton Street; Ste 606 Columbia, SC 29208

DESCRIPTION: Provide Budget and Planning Software Solution

USING GOVERNMENTAL UNIT: **UNIVERSITY OF SOUTH CAROLINA**

The Term "Offer" Means Your "Bid" or "Proposal". Your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Paper Offer or Modification" provision.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:	
MAILING ADDRESS: University of South Carolina – Purchasing Department 1600 Hampton Street Suite 606, Attention Bid Clerks Columbia SC 29208	PHYSICAL ADDRESS: University of South Carolina – Purchasing Department 1600 Hampton Street Suite 606, Attention Bid Clerks Columbia SC 29208

Solicitation openings and closings will be limited to teleconference only: Telephone 800-753-1965/Access code 777 7162

SUBMIT OFFER BY (Opening Date/Time): **Tuesday, January 26, 2021 at 11:00 AM (EST)** (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: **January 7, 2020 at 11:00 AM (EST)** (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: 1 (one) Original Hard Copy each for Technical & Price Proposals;
 1 (one) Digital version of technical proposal on USB drive;
 1 (one) Digital version of Price Proposal on USB Drive; and
 1 (one) each Digital version(s) of redacted Technical & Price proposal on USB Drive

CONFERENCE TYPE: Not Applicable DATE & TIME: <small>(As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions)</small>	LOCATION: Not Applicable
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AWARD & AMENDMENTS	Award will be posted on 03/25/2021 . The award, this solicitation, any amendments, and any related notices will be posted at the following web address: https://sc.edu/about/offices_and_divisions/purchasing/index.php
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You must submit a signed copy of this form with Your Offer. By signing, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date. (See "Signing Your Offer" provision.)

NAME OF OFFEROR <small>(full legal name of business submitting the offer)</small>	<small>Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.</small>
AUTHORIZED SIGNATURE <small>(Person must be authorized to submit binding offer to contract on behalf of Offeror.)</small>	DATE SIGNED
TITLE <small>(business title of person signing above)</small>	STATE VENDOR NO. <small>(Register to Obtain S.C. Vendor No. at www.procurement.sc.gov)</small>
PRINTED NAME <small>(printed name of person signing above)</small>	STATE OF INCORPORATION <small>(If you are a corporation, identify the state of incorporation.)</small>

OFFEROR'S TYPE OF ENTITY: (Check one) <small>(See "Signing Your Offer" provision.)</small>
<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Other _____
<input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local)

PAGE TWO
(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for Offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)
	Area Code - Number - Extension Facsimile
	E-mail Address

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
<input type="checkbox"/> Payment Address same as Home Office Address	<input type="checkbox"/> Order Address same as Home Office Address
<input type="checkbox"/> Payment Address same as Notice Address (check only one)	<input type="checkbox"/> Order Address same as Notice Address (check only one)

ACKNOWLEDGMENT OF AMENDMENTS							
Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)
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PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences. **ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES.** [11-35-1524(E)(4)&(6)]

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).

In-State Office Address same as Home Office Address

In-State Office Address same as Notice Address **(check only one)**

PREFERENCES DO NOT APPLY

PURPOSE OF AMENDMENT

The purpose of the amendment is to answer to bidder questions and extend the deadline for proposals.

QUESTIONS FROM OFFERORS - AMENDMENT (JUN 2017)

The solicitation is amended as provided herein. Information or changes resulting from questions will be shown in a question-and-answer format. All questions received have been reprinted here-in. The “state’s response” should be read without reference to the questions. The questions are included solely to provide across-reference to the potential offeror that submitted the question. Questions do not form a part of the contract; the “state’s response” does. Any restatement of part or all of an existing provision of the solicitation in an answer does not modify the original provision except as follows: underlined text is added to the original provision. Stricken text is deleted. [02-2A097-1]

Include these pages with your Bid as Page 3-4

Answers to Bidder Questions

- 1 Can you please consider a two week extension of the January 17th due date?
 - **The deadline for the submission of responses has been changed to January 26, 2021 at 11:00 AM (EST)**
- 2 Page15/#9- Can you please clarify this requirement? I understand this to mean that rules will be established/created to prevent any budget to be submitted if validation/alerts are not clear, however the reference of "Data Import" is confusing me. Is part of the "ask" that the validation rules be imported?
 - **The goal is to prohibit as much as possible instances where units would be allowed to go over budget or a budget imported would have errors or structure that would allow an unbalanced budget, either in whole or in part, to go undetected.**
- 3 Page 15/#16- Can you clarify what is commitment control? Is that the same as a benchmark or threshold?
 - **Commitment control involves a benchmark or threshold on the total budget of a unit.**
- 4 It is stated in the Cover page that the University wishes to receive hard copy submissions. Would the University be willing to accept emailed responses due to limited time and since most staff is working remote due to Covid-19?
 - **The University does not currently have the ability to accept electronic submissions as set forth in the SC Consolidated Procurement Code and Regulations. Please refer to the requirements for submission as stated on page 1 of the solicitation document and on page 10; SUBMITTING A PAPER OFFER OR MODIFICATION.**
- 5 How much of the legacy model schedules are they trying to preserve in the new solution or is this solution solely focused at the new model approach?
 - **The proposed solution will focus on the new model approach.**
- 6 Are there other allocations drivers in addition to the ones identified for revenue allocations and expense allocations?
 - **Allocation methodology and expense drivers are explained fully in our Budget Document found at https://sc.edu/about/offices_and_divisions/budget/budget_documents/index.php**
- 7 PeopleSoft Finance: Strategic Sourcing and Supplier Contract Management targeted for go-live 3/1/2020. Is the listed go-live date accurate OR is the targeted go-live date actually 3/1/2021?
 - **Correct – scrivener's error.**
- 8 PeopleSoft Human Capital Management: Time & Labor module go-live targeted for 8/1/2020. Is the listed go-live date accurate OR is the targeted go-live date actually 8/1/2021?
 - **Correct – scrivener's error.**

- 9 Is it fair to assume that the questions & answers shared in Amendment 1 of USC-RFP-3657-AS from October/November, 2020 are still true and accurate? If not, are there any specific responses from USC that would need revising in accordance with this re-bid?
- **The previous solicitation is cancelled which includes the Solicitation and any Amendments.**
 - **See Section III. Specifications and IV. Information for Offerors to Submit.**
- 10 II. Instructions to Offerors – A. General Instructions; Competitive Range: Can the University elaborate further on the evaluation criteria, weighting, and point calculation?
- **COMPETITIVE RANGE means that the second and third highest ranking Offerors must be able to compete with the (first) highest ranking offeror in order to be invited to provide a demonstration. Competitive range shall be 20 points or less.**
 - **The scoring weights assigned to each criteria will not be disclosed during the RFP process prior to Award.**
- 11 VI. Award Criteria, Evaluation Factors - Proposals: Can the University provide the weighting criteria for Phase I and Phase II evaluation factors?
- **The scoring weights assigned to each criteria will not be disclosed during the RFP process prior to Award.**
- 12 III. Scope of Work/Specifications, Subsection A: Can the University provide the name of the Business Analytics Platform being leveraged, which groups/units within the University are using it, and if the University anticipates any flows of data to/from that platform and the Budget and Planning Software Solution?
- **We anticipate data and reports from this solution could be pushed to Heliocampus. This product is currently in production for admissions and student affairs and will have an implementation for Finance.**
- 13 III. Scope of Work/Specifications, Subsection A, Question 22: Can the proposer assume that all budget data for the prior 10 years is easily available from PeopleSoft? and has already been remapped to accommodate any changes/updates to the chart of accounts that may have occurred over that time?
- **Budget data from prior 10 years is easily available in Peoplesoft with no remapping needed.**
- 14 IV. Information for Offeror to Submit: Can the University provide the page limits for Section 2, Section 3, Section 4 and for the full Technical Proposal?
- **There are no page limits for proposal offers.**
 - **Also, see Section IV INFORMATION FOR OFFERORS TO SUBMIT, paragraph 2, page 23.**

- 15 IV. Information for Offeror to Submit: In Section 5, the RFP states the Price Proposal should be a separate file but also states that ALL OFFERS must be provided in one (1) continuous file, can the University further clarify the if the Technical Proposal, Price Proposal and Attachments can be separate or detail the specific, acceptable submission format?
- **The Technical Proposal must be one continuous file. The separate Price Proposal must be one continuous file.**
- 16 Aside from grammar and terminology, what changes were incorporated differently from the original RFP (s_1600178524) which should be prioritized?
- **Please review this solicitation for the scope of work, information for offerors to submit and evaluation criteria.**
- 17 Based on the current expected start month of May, when would each process specified as part of Phase 1 be required to be live and in use?
- **Prospective Offerors should indicate best calendar for roll out of Phase 1 given the requirements in the Request for Proposals given our start date for implementation. Our fiscal year ends June 30.**
- 18 What is the expected number of users expected to utilize the system for Columbia in the initial phase?
- **Super users for solution set up and design could be as many as six people, depending on recommendation of proposer. Once solution is ready for roll out, the university anticipates each unit on campus have a user for anywhere from 50 to 100 users.**
- 19 Given the current environment, would the University of South Carolina be open to electronic-only copies of the response?
- **See answer to question 4.**
- 20 Are there any other expected implementations that are planned aside from this budgeting software that may impact the project either short-term or long-term? For example, a new implementation of PeopleSoft, Banner, etc.
- **PeopleSoft and Banner will continue to be in use.**
- 21 Is the University of South Carolina primarily looking for implementation estimates for Phase 1 for this RFP? Or are they looking for estimates on all potential phases?
- **The answer to this question is in Section I. Scope of Solicitation, page 1.**
- 22 How many data sets does the University of South Carolina envision loading and/or entering into the budgeting system? i.e. Actuals, Initial Budget, Revised Budget, etc.
- **Any specified information such as number of data sets would be general and subject to change. Prospective offerors should provide enough information in their response (unit prices, etc.) that would allow the University to configure and properly price any solution proposed in response to this Request for Proposals.**

- 23 Could the University of South Carolina provide an example of allocation logic related to the RCM process, including expected drivers and detail?
- **The answer to this question can be found in Section III. Scope of Work/Specifications subsection A., page 14.**
- 24 Does the University of South Carolina utilize any current reporting software beyond the nVision process?
- **Business Analytics platform for students is currently in production with Finance component within a year.**
- 25 Does the University of South Carolina already have a staged data set to see actuals down to an employee level? Does this include position, if applicable?
- **HR data is batch submitted to PeopleSoft Finance from PeopleSoft HCM.**
- 26 Can the University of South Carolina provide an estimated count of available entries for each expected level of detail (COA and specialty detail)? Ex. Account, Business Unit, Employee, etc.
- **We are unable to provide this information. The University is a large flagship institution with hundreds of thousands of lines of data.**
- 27 Based on the current entry template, the following segments are required: Account, Business Unit, and Activity from a Chart of Accounts detail. Does the University of South Carolina envision this changing? Do actuals also get brought in at this detail or would they use all listed segments?
- **The University does not expect a change in COA structure. Budget and actuals are allocated at the account code level.**
- 28 For the initial phase (1) in regards to "Budget Development", will this have workforce detail (position/employee/etc) included? If so, what level of detail does this include if beyond the standard Chart of Accounts?
- **HR information by detail is in PeopleSoft HCM, not PeopleSoft Finance with batch processing to PeopleSoft Finance each pay period.**
- 29 For the initial phase (1) in regards to "Budget Development", will this have RCM allocation logic included? If so, what level of detail does this include if beyond the standard Chart of Accounts?
- **The answer to this question can be found in Section III. Scope of Work/Specifications subsection A., page 14.**
- 30 Based on the ERPs and core functions listed, which do you envision integrating with the budgeting tool, both in and out? If using a Data Warehouse, then this would be considered the direct source by way of the initial source.
- **The answer to this question can be found in Section III. Scope of Work/Specifications, subsection A., page 13 & 14.**
- 31 Will the contractor be responsible for accessing source system data for integration or will the University of South Carolina be providing IT resources to work with the contractor in pulling applicable data?
- **The answer to this question can be found in Section III. Scope of Work/Specifications, Minimum System Requirements, page 16.**

- 32 Per H. Technology Requirements - 2f, does the University of South Carolina envision providing a project manager to work with the contractor project manager? Or will the contractor provide a full-time project manager to handle affairs from both groups?
- **The answer to this question can be found in Section III. Scope of Work/Specifications, subsection K. 2, page 20.**
- 33 Is the University of South Carolina open to a "Train-the-Trainer" methodology for user training?
- **Yes.**
- 34 Is the level of detail for data the same, different, or TBD across the various processes (annual budget, current year forecast, 10-year forecast)?
- **We look to the prospective offerors for solutions involving level of detail.**
- 35 Does the University of South Carolina envision using a parallel process for Phase 1? Or would the nVision process be disconnected once the budgeting solution is live?
- **Prospective Offerors are invited to provide their proposed solution for parallel processes alongside implementation.**