



DATE: July 9, 2018

Joliet Junior College
1215 Houbolt Road
Joliet, IL 60431

TO: Prospective Respondents
SUBJECT: Addendum No. 2
PROJECT NAME: Enterprise Resource Planning (ERP) Modernization
JJC PROJECT NO.: R18015

This Addendum forms a part of the Bidding and Contract Documents and modifies the original bidding document as posted on the JJC website. Acknowledge receipt of this addendum as specified at the end of this addendum. **FAILURE TO DO SO MAY SUBJECT BIDDER TO DISQUALIFICATION.**

Questions Received:

1. Wanted to know the BEP goal for this RFP.
The BEP goal for Information Technology related professional services is 20%.
2. My team will be unavailable for the scheduled demos during Aug 20-24 as they are already scheduled for [another meeting] that week. We would like to request our demo the following week.
Demo will be scheduled with finalists at a later date and JJC will work with vendors for scheduling considerations.
3. Is mandatory or preferred to have BEP Certification to respond to this Solicitation?
No.
4. If yes, is there any particular percentage of goal?
See question #1.
5. Can we sub contract with other vendor to satisfy the goal?
Yes, as long as said vendor signed in at the mandatory pre-proposal meeting.
6. What is the budget allocated to this contract?
Joliet Junior College does not share budget information in the solicitation process.
7. Can we attend pre - proposal meeting through dial in (or) is it mandatory to attend onsite?
In-person attendance for the pre-proposal meeting was mandatory.
8. Do we need to provide any resumes of Key personnel who is going to work on this?
This is not required, but we encourage vendors to portray the skillset of the personnel they will leverage for this project in the best manner they see fit.

9. I also wanted to ask about the option for partial proposals. I noticed that option and noticed later in the RFP that you're keeping the right to re-bid the implementation and management of the new ERP tool at a later time. Are you open to accepting partial proposals that cover only the professional services for implementation of the new solution now?
Yes.
10. Whether companies from Outside USA can apply for this? (like, from India or Canada)
All firms that attended the mandatory pre-proposal meeting are welcome to submit proposals.
11. Whether we need to come over there for meetings?
See question #7.
12. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)
Yes.
13. Can we submit the proposals via email?
No, the proposal must be submitted per the guidelines outlined in the RFP
14. On p. 27 of the RFP, there is a statement that says, "A diagram of the existing ERP environment is provided in the RFP as an attachment." However, we could not find such a diagram. Can you provide us with a copy of that diagram?
This document will be provided as part of the information package for applicants who fill out a Non-Disclosure Agreement (NDA) per the instructions on the RFP.
15. We believe that CRM functionality may need to be part of your overall ERP solution. If so, for scoping purposes, can you provide us with the minimum number of staff who may need to be logged into a CRM module at the same time?
JJC does not leverage a CRM today, so the number of staff who may be logged in is unknown at this time. If a vendor would like to include CRM functionality as part of their solution, they are encouraged to provide details on this option and estimate the number of staff based on information provided by JJC in the RFP as well as from our responses to other questions.
16. Except for general information in section 5.2.8 in the RFP, the RFP does not mention a specific format in which vendors' costs are to be provided for your review. Would we be correct to assume that we have the freedom to format project costs for a 5-year term such that (while meeting the requirements of section 5.2.8) we would be free to present those costs in a format with which we feel would be straightforward and easy to comprehend? If not, could you provide clarification regarding any cost formatting that you may require?
There is no required format to articulate vendor costs and we encourage vendors to portray the costs in the manner they best see fit, and we will clarify costs questions if needed to the vendor at a later date.

17. Although the RFP calls for an ERP system, we could not find requirements for any fundraising or advancement. Are we correct, then, to assume that the College is not requiring any fundraising or advancement functionality in the scope of this project?
Fundraising functionality is not part of JJC's current ERP environment. JJC leverages Blackbaud's Raiser's Edge for donor information and event tracking. Vendors are encouraged to suggest how they would interface to this service, or if they would provide similar services as part of their solution proposal.
18. In the RFP, there is a statement that says, "Sample project artifacts will need to be delivered for both project management (PMLC) methods and development lifecycle (SDLC) approaches. JJC desires an iterative project management and development approach." Could you define (or clarify) what the College means by "sample project artifacts"?
JJC is requesting samples of deliverables (including but not limited to project charters, project plans, testing plans, etc.) the vendor has delivered during various phases of their PMLC and SDLC for past projects they have implemented. These samples should be reflective of the methodology they proposed for our ERP solution, and indicative of the vendor's project management capabilities.
19. Why does the institution use both Paypal and Nelnet?
Paypal is our credit card gateway within our Ellucian ERP. Nelnet administers our tuition payment plan.
20. How does the institution view the ERP helping with SEM goals 1 and 3?
- a.** Strategic Goal 1: Provide Education Pathways that Promote Completion Offer quality educational pathways that align secondary and postsecondary curricula, course pathways, and industry-recognized credentials promoting access, success, and completion.
JJC's ERP is the foundational system which support college operations and is often the interface for students, faculty and staff to enable a JJC student's lifelong educational pathway. Throughout a student lifecycle, there are many opportunities for our ERP to improve our abilities to provide Education Pathways that promote completion.
- The Admission phase is one area of the lifecycle where enhancing our ERP could improve our abilities. JJC sees opportunities in improving the information provided to students to help them make informed education choices, streamline our admission process, ensure success in the degree audit, and in general better align their pathway selection to promote completion and success.***
- Other key areas of opportunity refining our ERP might enable is developing a student-centered course schedule that will increase enrollment. The College has observed that students are not able to take courses at the time they need them. Inconsistencies have developed from a multiple-source approach to scheduling courses. These inconsistencies have created a situation in which the software programs designed to help facilitate the schedule are no longer able to do this task efficiently.***

The new ERP will work in conjunction with other technical initiatives accelerated by our Title III Grant. In fall 2015, the college received a \$2.1 million, five-year, Title III grant from the U.S. Department of Education under the Strengthening Institutions Program. The initiative, a collaboration between Academic Affairs and Student Development, focuses on three major components: improving student support services, increasing academic innovation in developmental education courses, and enhancing student communication technology. These tasks will be accomplished by the year 2020 through projects intended to provide high-touch, high tech student-centered engagement and high-impact learning pathways through learning communities

Finally, fundamental to tracking and refining our success is our abilities to measure and analyze data. JJC seems opportunities in our ERPs ability to deliver baseline data on important attributes such as degree awards, 4-year college transfers, persistence, retention and other critical metrics, while better analyzing correlations and causative factors to these metrics.

Vendors are encouraged to recommend solutions based on their expertise where they see opportunities to promote our SEM goals in areas not yet identified.

b. Strategic Goal 3: Collaborate with Employers and the Community Engage and partner with employers and the community to enhance academic programming. ***Beyond some of the same ideas listed above for Strategic Goal 1, JJC has less defined ideas of specifically how the ERP can enhance Strategic Goal 3, but feel improved reporting, automation, and better technology can contribute to success in this area. Vendors are encouraged to recommend solutions that promote our strategic goals.***

21. Does the Guided Pathways plan start with Joliet Students or High School Students? What is the vision?

JJC's Guided Pathway engagement starts immediately with our first engagement with potential students in High School and continues through their student lifecycle. Please refer to Question #20a and our SEM Plan in the Supplemental Information Packet for details on our Guided Pathway vision.

22. How satisfied is the Joliet with Canvas?
This is not within the scope of the RFP.

23. Can you explain how Joliet uses DigArc for Catalog and Curriculum Management?
DigArc products Acalog and Curriculog are the database and change management system for new and revised courses and programs as well as the college's online catalog. (Curriculum processes include proposals, approvals, tasks, notifications, dashboard, etc. Catalog includes publishing, editing, versions, permissions, archives. Etc.) An integration manager provides interface with/update within Ellucian Colleague.

24. What does Joliet mean by non-credit courses? Are these courses that are somehow simply tied to traditional offerings, or are they part of a continuing education program? If they are part of a CE program, do they have any other CE-specific needs?

Our definition of a noncredit course refers to community education and corporate training. Our courses within Adult Basic Education, ESL, and Workforce Education are credit bearing but not college-level credit.

25. Will Joliet Junior College name resources to the change management effort and will these resources be dedicated full time to project activities?

Yes, JJC will provide resources as required and directed for the change management effort and project activities. Vendors are encouraged to provide direction on best practices and recommendations for what JJC resources are expected as part of their proposed project solution quotes.

26. Does Joliet Junior College have an internal communications department and will this department actively participate in project activities?

Yes.

27. Can you describe the stakeholder network at Joliet Junior College? Have all the stakeholders been organized as yet and included in the RFP process?

A full JJC organization chart was provided as part of the Supplemental Information Packet for applicants who submitted the NDA per the instructions in the RFP. A RFP committee has been formed and the members were introduced in the on-site preliminary vendor meeting. Vendors are encouraged to list which stakeholders they feel will be required and recommend best practices for their organization for the project as part of their proposed solution.

28. Please provide examples of challenges, your current processes, and/or systems present, with providing service to students at different points of the student lifecycle. These challenges might include areas such as; communication, self-service, process automation, etc. We would appreciate examples, from pre-applicant phase (prospect and inquiry), applicants, admitted, matriculated, and alumni.

There are improvement areas for our ERP throughout all different points in the student lifecycle including but not limited to:

- ***Lack of a CRM or other systems for prospecting today***
- ***No cohesive data visibility of students throughout their lifecycle from prospect to alumni.***
- ***Challenges in financial aid include areas such as self-service electronic document submission, electronic signature, individual or program specific COAs versus all or nothing, challenges with ledger and TIV charges, hard coded eligibility for Title IV, and administration of Illinois MAP grants.***
- ***Auto awarding and auto packaging today is bulky – it takes too much time, too manual***
- ***DAC could be more intuitive, information there but we are challenged to have built in functionality to pull this information out and award.***
- ***Too much manual effort in attempts to automate admissions and graduation requirements***
- ***An overall lack of reporting and analytics.***
- ***Federal and state statutory reporting - while many functions may have some data analytics and reporting, the comprehensive data for statutory reports may not be available.***

29. Do you have a vision or ideas for your preferred method to solve these challenges? If so, please share.

In general JJC envisions greater self-service, automation, and report/analytic capabilities from our ERP to help solve these challenges. Vendors are encouraged to recommend methods to solve these challenges from their best practices experience as part of their proposed solution.

30. To help us better understand your requirements for the Student system, please provide policy, procedure and training documentation for the Admissions Office, Financial Aid Office, Student Accounts and Payments, the Registration Office, and the Records Office. In addition, please provide any other areas you believe will be helpful in understanding your needs.

One of the challenges JJC faces is a lack of documented policy, procedure and training documents for system usage and hopes to improve this area as part of the ERP project. JJC will provide what it can to vendors who complete the Non-Disclosure Agreement (NDA) per the instructions on the RFP to help answer this question.

31. Do you have or do you plan to add academic programs where progress is measured in clock hours? If yes, please describe.

No.

32. Do you have or do you plan to add competency based education programs? If yes, please describe.

This is currently a topic under discussion.

33. Do you have programs or courses that do not have a distinct start or end date? If yes, please describe.

No.

34. Do you have any programs that are awarded financial aid using "non-term" processing rules? If yes, please describe.

No.

35. Do you have courses of different lengths? For example, a 5 week course as part of a 15 week term. If yes, please describe.

Yes. While all courses fit within a defined term, they may have various start and end dates.

36. Do you have more than one academic calendar? For example, Program A on Calendar 1 and Program B on Calendar 2. If yes, please describe.

No. Even though there are several "sessions" within an academic semester there is one published calendar.

37. Do any of your programs use cohorts? For example, students entering at start date X all take the same courses in the same order. If so, how often do these programs start? Are they all awarded financial aid using the same academic calendar?

Effectively we do. Some programs have common tracks and terms and the students find themselves on the same calendar cycle.

38. Do you use a Scheduled Academic Year (SAY) or Borrower Based Academic Year (BBAY) for Direct Student Loans? If BBAY, do you use BBAY1, BBAY2, or BBAY3? Please indicate if this varies by program and why.

SAY.

39. What Pell Formula(s) do you use for determining Pell Grant amounts (e.g. Pell Formula 1, Pell Formula 4, etc.)? Please indicate if this varies by program and why.

Formula 1 is used.

40. Is replacing the Learning Management System (LMS) a requirement of this project?

No, but integration between our current LMS and our ERP is mandatory.

41. Do you require the ability to track student job placements?

It is not required but we are interested in hearing more information about this.

42. Do you require the ability to manage interactions, outreach, etc with employers?

It is not required but we are interested in hearing more information about this.

43. Do you require the ability to take attendance in any courses? If yes, please describe and indicate if this for online courses, ground courses or both.

We do not require it but if it is available we would leverage this function for all modes of course delivery.

44. Does Joliet Junior College have a preferred format in mind for how vendors should provide costs for the project?

See question #16.

45. Regarding providing you with the estimated project cost, how granular would you like vendors' pricing to be shown? That is, would you like a highly detailed itemization of products and services? Or would you like vendors to provide costs in a more general, higher-level format?

We encouraged cost estimation responses to be as granular as possible and in the manner the vendor best sees fit.

46. Could you confirm or disconfirm whether the College would like an alumni solution to be part of this procurement?

It is not required but we are interested in hearing more information about this.

47. To help us to determine the project scope, can you provide us with the following totals?

- a. the number of employees in the Finance, Accounting, and/or Payroll departments
13
- b. the number of employees who are permitted to create or approve budgets **53**
- c. the number of employees in your Human Resources department **12**

- d. the number of employees working for the College per the following categories:
 - i. the total number of full-time employees **588**
 - ii. the total number of part-time employees (including faculty and adjuncts) **1023**
 - iii. the total number of student workers **150**

48. Are there any planned changes/terminations of any existing vendor relationships for current HRIS, Payroll, Financials, Student Administration, or other systems that may impact the timeline for the deployment?

There are no vendor changes known at this time which will impact deployment timelines. Existing vendor contracts generally renew yearly and costs for any overlap of services required will be factored in as part of our detailed cost analysis.

49. What requirements or constraints exist regarding the project start and go-live date(s) for the implementation?

There are currently no pre-defined constraints to project timelines. However, the vendor is encouraged to propose logical time frames, being mindful of times of peak of activity and our school calendar.

50. What requirements or constraints exist regarding the deployment approach and phasing for the different functional areas included in the implementation?

There are no pre-defined requirements or constraints at this time. As part of the proposed project solution quote, we encourage the vendor to recommend a deployment approach and phasing strategy based on their industry best practices experience.

51. Do you have the resources necessary to extract data from all legacy systems?

JJC's ability to provide resources to extract data is unknown at this time without knowing details on what is required. JJC will provide resources for the project as directed and the vendor is encouraged to provide details on what is expected from JJC for the legacy data extraction as part of their proposed project solution quote.

52. Please supply the following Financial volumes and information:

- a. The number of Ledger Accounts **2,500**
- b. The number of Legal Entities and/or Business Units **1**
- c. The number of departments (cost centers) **Approximately 250**
- d. The number of divisions **7**
- e. The number of journals added per month **70**
- f. The number of vendors (suppliers) **Approximately 2,819**
- g. The number of vendor (supplier) contracts **Approximately 215**
- h. The number of purchase orders created per month **Approximately 290**
- i. The number of vendor (supplier) invoices created per month **No supplier invoices are created – only tuition billings**

- j. Do you have capital projects?
 - i. If yes, please describe process the County follows to create a capital project.
Part of budget process
 - ii. Are there any asset integrations? **No**
 - iii. The total number of Projects and the average amount added per year
Depends on the year
 - iv. Are projects tracked at a granular level (Phases, tasks)? **No**
 - k. The number of customers **Approximately 15,000 students**
 - l. The number of current and active customer contracts **N/A (vendor listed above)**
 - m. The total number of current and active Grants **50**
 - n. The volume of Grants established per year **20**
 - o. The number of current and active funds **12**
 - p. The number of current and active programs **This information will be provided to the awarded vendor**
 - q. The number of banks (financial institutions) **This information will be provided to the awarded vendor**
 - r. The number of bank accounts **This information will be provided to the awarded vendor**
 - s. The number of true endowments **N/A**
 - t. The number of Quasi endowments **N/A**
 - u. The number of donors **N/A**
 - v. The number of gifts added per month **N/A**
 - w. The number of investment pools **This information will be provided to the awarded vendor**
 - x. The number of investment statements recorded per month **This information will be provided to the awarded vendor**
 - y. The number of business assets **2,400**
 - z. How are business assets depreciated? **Straight line**
 - aa. Do you track assets by employee, location, etc.? **Location and funding source.**
53. Are you using procurement cards? If so, please explain the process.
Yes, the college imports procurement card expenditure data into the ERP to charge purchases back to the appropriate GL accounts.
54. Are you using Travel/Expense cards? If so, please explain the process.
The college procurement card is used for travel expenditures with the exception of lodging, per diems for meal, and incidentals.
55. How do you currently track their gifts/investments (if any)?
N/A
56. Do you have a centralized A/P structure?
Yes.
57. Do you have a centralized A/R structure?
Yes.

58. Do you have multiple systems of record for finance (I.e., sub systems and/or access databases/additional accounting entries that are not in your current Ellucian environment)? If so, how many and what types?
No.
59. Which accounting dimensions do you use to balance your financial reporting (i.e., Fund/Grant/etc.)?
Fund and department (where applicable).
60. What types of reporting or analytics are you unable to generate today, using your current systems?
The vendor is encouraged to provide the reporting analytics they are capable of to provide JJC a better idea of what is possible.
61. Under current processes, how long does it take you to close a period?
Monthly closes take a few days.
62. Under current processes, how long does it take you to close a year?
The year-end close takes 6 weeks.
63. What is the estimated volume of A/R and A/P carryover to the next year?
**Financial reports for JJC are posted on our public website at <http://www.jjc.edu/about-jjc/college-leadership/administration/administrative-services/financial-services>.
If your system has a limit it needs to be provided.**
64. Please describe your current budget process.
JJC's budget process today is heavily reliant on spreadsheets. Please refer to our public website for timelines and further explanation. See <http://www.jjc.edu/about-jjc/college-leadership/administration/administrative-services/financial-services>
65. What factors do you budget by today (e.g. department, fund, grant, etc.)?
Yes to all of those.
66. Please confirm whether you do budget checking.
Yes.
67. Please confirm whether you use commitment/encumbrance accounting:
- For purchase orders? **Yes.**
 - For vendor (supplier) invoices? **No.**
68. Are there any job or compensation leveling / optimization activities underway or planned, during the timeline of the implementation?
None that we are aware of at this time.

69. What types of pay components do you anticipate being configured to support recording of compensation? These should include Hourly and Salary compensation amounts, additional elements including variable pay components, as well as bonus, allowance, and one-time payment plans.

Salary, hourly, faculty overload, adjunct and miscellaneous additional pay stipends.

Additional elements include:

- ***Overtime***
- ***Comp time***
- ***Accrual of leave plan hours. Ability to tie accrual of leave to the “contact hours” the instructor is teaching.***
- ***Shift premium***
- ***Shift differential***
- ***Training pay***
- ***Ability to track employees earnings “real time” to monitor that they don’t exceed a certain percentage of earnings each year (annual, fiscal, or custom/defined).***
- ***Interim pay assignments as a percentage of base pay .***

70. Are contingent workers or contractors stored, managed or maintained in your ERP system?

Independent Contractors are managed through the ERP system as vendors. Other contingent, seasonal or temporary workers are also maintained in the ERP but are identified as employees.

71. Approximately how many job codes or job profiles are there?

There are 22 job classifications (eg: administrator full time, food service part time). There are approximately 630 position codes.

72. Can workers be in multiple jobs, where each job may be a different job code, or report to a different manager?

Yes.

73. How many unions are there? And, how many workers are in unions?

7 unions:

<i>Facilities</i>	<i>92</i>
<i>Clerical FT</i>	<i>71</i>
<i>Food FT</i>	<i>8</i>
<i>Faculty FT</i>	<i>217</i>
<i>Adjunct</i>	
<i>Faculty</i>	<i>430</i>
<i>Police</i>	<i>13</i>
<i>Support</i>	<i>195</i>
<i>Union Total</i>	<i>1026.</i>

74. How many terminated workers will be loaded into the system?
A determination has not been made by the implementation team.
75. How many benefit plans do you have?
10.
76. How many benefit providers do you have?
7.
77. When is Benefits Open Enrollment?
November each year for a 1/1 start date
78. Are retiree benefits administered at all through your ERP system?
No.
79. Do you have any workers with grandfathered benefits? If yes, how many?
No.
80. Do you offer benefit credits such as wellness? If yes, how many?
Not at this time.
81. Do any benefit plans have eligibility based on number of hours worked?
Yes; under the affordable care act.
82. Do you use a 3rd party COBRA provider?
Yes.
83. How many time off (vacation/PTO/annual leave, sick, bereavement, etc.) plans do you have today?
15.
84. How many long-term leave plans do you track today (FMLA, Maternity, Military, etc.)?
Currently, these plans are tracked manually outside of the ERP (FMLA, unpaid, ADA, Military); desire to have them tracked electronically.
85. How many FEINs do you have?
1.
86. How many earnings and deduction codes do you have?
***Earnings codes (types) 35 in use/75 open in the system
Deduction codes 65 in use.***
87. How many pay groups do you have?
We run payroll as one pay group. The college has to follow seven union contracts.
88. Will you use third-party vendors to provide services for Check Printing, Garnishments, and Tax Filing?
No.

89. Will you continue to use your existing time clock system with [this solution]?
This is to be determined and will depend on the solutions proposed.
90. How many different time entry codes do you have?
Approximately 30.
91. Will it be necessary to track time worked on specific projects, either for billing or internal cost allocation? If so, how many different project codes do you have?
Yes, this is a desired feature of the project management team.
92. Will all candidates see a consistent job template and a consistent brand?
Yes.
93. How many offer templates are in use today, and how many do you anticipate will be necessary for the future state?
10 now; no additional anticipated.
94. Will any third-party recruiting agencies be able or required to use [a recruiting component]?
Not at this time.
95. How many Job Boards will you use for posting job postings [through this solution]?
We have one vendor, People Admin. We have dozens of job boards that either pick up the postings electronically from our site or we post directly to theirs.
96. Are any pre-employment assessment and/or background screening services used?
Limited pre-employment assessment.
Criminal background verification services are in place with a vendor.
Pre-employment drug testing is in place with a vendor.
97. Do you plan to have new hires complete the onboarding process?
Ideally, yes. It is desirable to reduce the number of vendors and streamline the processes between recruitment and onboarding.
98. How many different types of documents are required during the onboarding process?
12.
99. Will you require the use of e-signatures (e.g., Adobe DocuSign) as part of onboarding?
Yes.
100. Please confirm if you perform all of the following review types: Performance Improvement Plan, Performance Review, Disciplinary, Development?
Yes.
101. How often are performance reviews completed? Does this process include review calibrations?
90 day, 180 day and annual.
No calibrations.

102. Do you use goals and/or competencies?
Yes, goals.
103. How many different merit plans do you have?
None.
104. Do you perform talent assessments separately from a performance review process?
Not currently in place, but anticipate this as a future goal.
105. Will you be using succession planning [within the solution]?
Highly desired.
106. Number of academic departments across institutions which owns programs of study or offers course.
Fourteen (14)
107. How many physical campuses do you have?
Six (6)
108. How many academic levels do you offer?
Three (3): Associate degree, Certificate of Completion, and Certificate of Achievement and the future possibility of Baccalaureate.
109. How many students are currently enrolled in an online, professional or Continuing Education program?
- **Online: Headcount is 3500+/semester take online courses.**
 - **Approximately 12,000 (80% of) JJC students log into the LMS at least once each term for assignments, exams, or resource materials.**
 - **The LMS provides coursework (online and hybrid) to ~6000 students per semester.**
 - **In Spring 2016, on average, 1.3 million sessions each day on the JJC Canvas LMS**
 - **Continuing education: 24,000 students annually.**
110. How many active degree programs are offered?
One hundred eighty five (185) .
111. Do you offer semester, quarter or clock hours or any combination of these?
Semester.
112. How many of your academic units operate under a separate academic calendar?
None.

113. How many Academic levels participate in Student Recruiting?
Joliet Junior College grants associate degree and certificates (Over 180) which are at a freshmen and sophomore level coursework. Admissions and academic offices recruit for any of these programs. NOTE: If Gainful Employment disclosure and acknowledgement process will continue or will be a federal mandate, an ERP system will need to address this technology process.
114. How many Academic Offices participate in unique recruiting activities do you have?
All fourteen (14) academic departments.
115. How many recruiters are assigned by school/college?
Three recruiters housed in admissions are assigned high school territories.
116. Do you have a CRM or other communication system to send email and track effectiveness (e.g. opened, replied, deleted) with Prospects?
No. We are currently working on the scope of work to leverage the Prospect/Inquiry screens in the Ellucian Colleague ERP system.
117. How many search services or test score loads do you import currently?
ACT and SAT scores; Academic Skills Center inputs
118. How many recruiting regions (recruiters are assigned) do you have?
Three recruiters split 25 high schools located in JJC district.
119. How many yearly recruiting events are held?
Between high school, campus tours, college fair, scheduled on or off campus recruitment events by admissions and other departments, there are over 622 (304 campus tours and 318 recruitment events).
120. How many Admissions Offices do you have?
One.
121. How many Admission supporting documents are collected per student?
Anywhere from 2 – 6 depending on whether it is a general application or selective admissions program.
122. How many applicants per year to each?
23,000 -In addition, we would need prospective student and student application web forms that can electronically import data into the ERP system. Would need a Duplicate Student Resolution process for both applicants and prospective student data. In addition, we have 6-7 selective admissions programs that currently have their own web-based forms and would need to be electronically integrated into the ERP data system. This would include international admissions. Needs to handle the new guided pathway structure at the applicant stage.

123. How many Application requirements do you have? (Test Score, Transcript, etc.)
None, open and rolling admissions. However, we receive many high school transcripts and placement test information to use for course equivalency and placement purposes. We receive around 15,000 documents each year to scan and attach student record. A large majority of these documents are high school transcripts. If the ERP system can develop a work flow with JJC's current document imaging system, then Admissions could take data elements from the high school transcript that could be imported directed into student system without manual data entry.
124. Please describe your Admission Evaluation process.
General admissions process with no application requirements. 6-7 selective admissions programs that require an evaluation process. International Student Admissions would require an evaluation process, too. Need a communications management module for prospective students and student applicants. This may be the time for the institution to review a CRM system that would tie to direct mail, email (both personal and student account), texting modes, etc.
125. What different Credentials do you confer (e.g AA, AS, AGS, AAS, CAC, CCO)?
AA, AS, AGS, AAS, CAC, CCO, AES, AAT.
126. How many transcripts do you have specific to each school?
One.
127. How many Programs (e.g. Majors, Minors, Certificates) do you offer?
One hundred eighty five (185).
128. How many Academic Calendars do you have?
One
129. Do you schedule your classes into fixed terms or do you also have dynamic periods?
Fixed Terms.
130. How many levels of approval do you have for course additions/changes?
There are eight (8) levels of approval. This is currently handled by DigArc/Curriculog. We would be interested in information if your system handles this process.
131. Do you have Athletic Compliance Tracking Requirements?
No.
132. How many International Students do you track?
Please refer to the JJC Spring 2018 Census SEM Report as part of the information package for applicants who fill out a Non-Disclosure Agreement (NDA) per the instructions on the RFP.

133. Will you implement Academic Appointments in [the solution]?
It is not required as we currently leverage GradesFirst for advising appointments but we are interested in hearing more information about this.
134. Will you implement Period Activity Pay in [the solution]?
It is not required but we are interested in hearing more information about this.
135. Do you automatically clear students for graduation without human intervention
No. Lessening human intervention is a goal of the new ERP.
136. Do you maintain graduation plans for each program/major that list recommended courses and terms offered?
Yes.
137. How many different advisor types do you have?
Two (2).
138. How many independent Financial Aid offices are there at your institution?
One (1).
139. What is the total number of award items you administer?
We currently have 12995 different award codes. including Pell, MAP, VA, IVG, loans, and scholarships. Our Foundation Office required each scholarship to have their own award code which is why we have such a high number.
140. How many awards (non Federal) do you administer that have very complex eligibility requirements or complex logic to determine the amount?
While a high percentage of the scholarships have some set up in the rules of what AR codes can be paid, typically only our main awards (Pell, SCOG, MAP and students loans) have complex rules for eligibility and transmittal.
141. What is the total number of cost items used?
Over our over 3,500 AR codes presently 28 AR codes are actively used toward financial aid.
142. How many cost items do you administer which require complex logic (to determine assignment or amount)?
Each of the awards may have simple and specific logic in how amounts are assigned via AR code.
143. How many unique action items do you assign?
If we understand the question we have 5 different action statuses we use to assign awards.
144. How many unique engagement (communication) items do you use?
We leverage Ellucian's Communication Management module in our Colleague ERP and have about 12 different communications specific for financial aid only.

145. Do you have complex special aid (see definition) programs do you administer?
No.
146. Do you administer private loans?
No.
147. How many disbursement rules are used on average for your award items?
32+.
148. What Payroll solution will be in place to support Federal Work-Study?
Vendors are encouraged to provide details on what your system is capable of to support Federal Work-Study.
149. How many 'chart of accounts' (unique accounting, revenue, refunding, payment precedence or other financial rules) are used for student transaction across the institution(s)?
Classes either follow the tuition table or are a flat fee. Variable tuition of 1.5 or 2 times the tuition rate is used on certain classes. Tuition table has three rates depending on residency; in-district, out-of-district and out-of-state.
150. How many fees and their rates do you have?
See Question #149.
151. How many fees utilize a complex set of calculations to determine the rate? (more than 5 distinct elements or attributes)
None.
152. Do you have a professional school(s) that will have different unique rules and requirements?
No.
153. Describe your Cashiering Processing.
Our process today leverages the Cashiering Processing functionally of our Ellucian Colleague ERP.
154. Describe your credit card payment processing.
Credit cards are processed via our Ellucian Colleague ERP Paypal gateway.
155. Describe the institutional process to notify students their fees are due.
We notify students via email and mail.
156. Describe your Payment Plan processing.
Payment plans are processed via our Ellucian Colleague ERP Nelnet gateway.

157. How many Sponsor Contracts (third parties, agencies, 529 plans, foundations or other organizations who pay for student fees) do you set up and invoice for an academic year?
200.
158. How many 3rd Party statement formats do you provide to your 3rd parties (third parties, agencies, foundations, 529 plans or other organizations who pay for student fees) to receive payment on student accounts?
None.
159. How many refund policies do you have (e.g. it differs for non-credit or other academic programs)?
Refund policy is a rule based on how long the class runs.
160. How many different types of Waivers, Discounts and Exemptions do you administer?
No more than 10.
161. Describe your collections process for Sponsors who have unpaid invoices.
Restrict the sponsor and would turn over to collections.
162. Describe your collections process for students who have past due balances
Restrict the student and would turn over to collections.
163. What single sign-on (SSO) authentication do you plan to use?
It is our desire all administrative access to the ERP will be authenticated via the College ADFS Single Sign-On (SSO) or Azure AD authentication sets. Additional details on our Information Security requirements including authentication can be found in the RFP. The vendor must describe their SSO options and approach as part of their proposed solution quotes.
164. How many internal, dedicated change management, communications and training resources will be provided for the implementation?
The number of resources JJC will provide has not been defined at this time. Vendors are encouraged to provide direction on best practices and recommendations for the internal, dedicated change management, communications and training resources that are required as part of their proposed project solution quotes.
165. Briefly describe your organization's culture and estimated level of resistance to change/adoption of technology.
In general, JJC is committed to the changes the new ERP will require, but will face the normal challenges a well-established institution faces when moving off a long standing legacy system. Additional details on this topic were discussed in the on-site preliminary vendor meeting.

166. Have you engaged end-users in a Change Champion network previously?
While not named as such, JJC has implemented projects in the past where project team members have been chartered to promote organizational change. Vendors are encouraged to provide details on their change management approach as part of their proposed project solution quotes.
167. Will development of training materials (job aids, Captivate simulation videos, PPTs, etc.) be created internally or by your partner?
It is anticipated that materials will be developed jointly by our partner and JJC internal teams. We expect vendors to provide detailed documentation regarding their products while JJC will cooperate to produce documentation dealing with procedures unique to JJC. Vendors are encouraged to recommend an approach to training material development and detail responsibilities as part of their proposal.

End of Addendum #2



DATE: July 9, 2018

Joliet Junior College
1215 Houbolt Road
Joliet, IL 60431

TO: Prospective Respondents
SUBJECT: Addendum No. 2
PROJECT NAME: Enterprise Resource Planning (ERP) Modernization
JJC PROJECT NO.: R18015

Please acknowledge receipt of these addenda by including this page with your proposal. Include your company name, printed name, title, and signature in your acknowledgement below. Failure to do so could result in disqualification of your bid.

Issued by:

Janice Reodus
Director of Business & Auxiliary Services
Joliet Junior College
815.280.6643

I acknowledge receipt of Addendum #2.

Company Name

Printed Name

Title

Signature