

San José State University Research Foundation

**REQUEST FOR PROPOSAL (RFP)
ENTERPRISE RESOURCE PLANNING SOFTWARE
SYSTEM(S)**

I. Introduction

The purpose of this RFP is to solicit proposals from vendors qualified to implement an enterprise resource planning software system(s) which meets the needs of our organization. The ideal vendor will have experience implementing research administration, human resources and financial management. They will have some research administration experience, preferably with public university research endeavors.

The San José State University Research Foundation (SJSURF) provides business and administrative services to faculty and researchers at San José State University and helps researchers plan projects, identify funding sources, develop and submit grant proposals, and manage all the business details once the project is funded.

The SJSURF is a 501(c)(3) non-profit organization and is governed by a Board of Directors composed of San José State University vice presidents, deans, faculty, professors, and members of the campus community. The SJSURF has a staff of 58 full time employees and an annual operating budget of \$9.2M.

The SJSURF currently utilizes a mix of different information systems to fulfil its mission as listed below:

- Central Square: Finance Enterprise, HRIS and Grant Management
- ONESolution
- Custom-developed workflow systems

II. Scope of Services

The SJSURF is seeking an ERP system which incorporates the following functions and features.

Areas of specific interest are:

- Non Profit Fund Accounting and Financial reporting
- Grant management (pre- and post-award functions)
- Human resources information system (HRIS)

Deliverables will be a prtoposal outlining the recommended ERP system, a plan detailing the implementation timeline and transition from one system to the one recommended, a schedule to educate and train staff/end users, and follow up services such as help desk accessibility or on call assistance.

III. Proposal Requirements

The proposal must provide a summary of the firm’s qualifications to perform the duties outlined in the scope of services section.

All proposals shall include the following:

- Cover Letter
- Proposal Summary
- General vendor Information and Qualifications
- Customer References
- Use Case/Functionality Assessment
- Integration Description
- Project Schedule and Work Plan
- Pricing Proposal
- Acceptance of Terms and Conditions

COVER LETTER

The cover letter must contain the following statements and information:

1. “Proposal may be released as public information in accordance with requirements of the laws covering same.” (Any proprietary information must be clearly marked).
2. Proposal and cost schedule shall be valid and binding for 180 days following proposal due date and will become part of the contract that is negotiated with San José State University Research Foundation.
3. Company name, address and telephone number of the firm submitting the proposal.
4. Name, title, email address and telephone number of the person or persons to contact who are authorized to represent the firm and to whom correspondence should be directed.
5. Proposals must state the proposer’s federal and state taxpayer identification numbers.

PROPOSAL SUMMARY

This summarizes your proposal and your firm’s qualifications. You may use this section to articulate why your firm is pursuing this work and how it is uniquely qualified to perform it.

GENERAL VENDOR INFORMATION AND QUALIFICATIONS

Indicate:

- I. Firm Identification

Provide name of firm and the firm's principal place of business, and the name, email address and telephone number of the contact person. Include the proposer's federal and state taxpayer identification numbers.

2. **Description of Qualifications**

Provide a brief history and description of your firm's available services and qualifications. Include general information regarding organizational structure, size, capabilities, and areas of specialization.

CUSTOMER REFERENCES

Please list private and public sector clients for whom you have current contracts or software services relevant to this RFP over the past two years.

Be willing to provide the customer's designated contact name, title, organization, email and telephone number if requested.

USE CASE/FUNCTIONALITY ASSESSMENT

Describe your product's ability to perform the user cases identified in the Appendix of Use Case Scenarios.

INTEGRATION DESCRIPTION

In the case where your firm cannot provide equivalent solutions to the identified use cases, please provide a description of the of the systems or data integration plan in order to satisfy all elements of the ERP requirements.

PROJECT SCHEDULE AND WORKPLAN

Provide a detailed project implementation plan that includes:

1. Beginning and end dates of all tasks (the actual project start date will be determined during contract negotiations)
2. A table listing vendor staff assignments and proposed labor hours for all tasks
3. A brief description of each task and its work products
4. A description of projects deliverables

PRICING PROPOSAL

The Proposal must contain a pricing schedule that includes all subscription, licenscing, implementation and support costs relative to the proposed implementation as defined by the vendor.

ACCEPTANCE OF TERMS AND CONDITIONS

Indicate exceptions that your firm takes to any terms and conditions listed in this RFP, including the Attachments. Proposals which take exception to the specifications, terms or conditions of this RFP or offer substitutions shall explicitly state the exceptions(s), reason(s) therefore, and language substitute(s) (if any) in this section of the proposal response. Failure to take exception(s) shall mean that the proposer accepts the conditions, terms and specifications of the RFP.

If your firm takes no exception to the specifications, terms and conditions of this RFP, please indicate so.

Signed By: _____

Title: _____

Date: _____

For/Firm: _____

IV. RFP Official Contact

The RFP official contact is Eric Hagan, Executive Assistant, whose contact information is listed below. Vendors should rely only on written statements regarding the RFP issued by Eric Hagan.

Address: Eric Hagan
San José State University Research Foundation, or SJSURF
210 N. 4th Street, Fourth Floor
San José, CA 95112

Phone: 408-924-1403

Email: researchfoundation@sjsu.edu

V. Procurement Schedule

The procurement schedule for this project is as follows:

NOTE: The SJSURF reserves the right to adjust this schedule as necessary.

MILESTONE	DATE
Request for Proposal Issued	May 1, 2023
Proposal Submissions Deadline	June 30, 2023
Finalists Selected	July 28, 2023
Vendor Interviews (please reserve this date)	August 17, 2023
Vendor Selection	September 2023

VI. Submission Procedures

Proposers may email a pdf submission document to researchfoundation@sjsu.edu. It is the submitter's responsibility to verify that the SJSURF has received and is able to open the document. Electronic submissions are encouraged. Hardcopy proposals will also be accepted if submitted without hard covers, binders, spines or table (easy to copy). If submitting hard copies, please provide three (3) copies.

Late Proposals will not be considered. All proposals become the property of the San José State University Research Foundation.

Proposers should provide contact information to researchfoundation@sjsu.edu in order for The SJSURF to provide interested vendors with a list of any questions received and the agency's answers to those questions.

VII. Evaluation Procedures

The Executive Director, and ERP Upgrade Committee will evaluate the proposals. The evaluators will consider how well the vendor's proposed solution meets the needs of the SJSURF as described in the vendor's response to each requirement and form. It is important that the responses be clear and complete so that the evaluators can adequately understand all aspects of the proposal. The evaluation process is not designed to simply award the contract to the lowest cost vendor. Rather, it is intended to help The SJSURF select the vendor with the best combination of features, capabilities, integrations and implementation procedure, including price, based on the evaluation factors. The SJSURF reserves the right to require that a subset of finalist vendors make a presentation to a selection team.

VIII. Appeals

Vendors who wish to appeal a disqualification of proposal or the award of contract may submit the appeal in writing to the ERP Upgrade Committee within ten working days of the issue date on the Notice of Award or disqualification. Appeals should be sent to the following address:
San José State University Research Foundation
Executive Assistant
210 N. 4th Street, Fourth Floor
San José, CA 95112

The appeal must describe the specific citation of law, rule, regulation or common business practice upon which the protest is based. Neither the judgment used in the scoring by individual evaluators nor disagreement with the procurement process shall constitute grounds for appeal. San José State University Research Foundation will not consider any protest based

on items that could have been or should have been raised prior to the deadline for submitting questions or requesting addenda. The filing of a protest shall not prevent The SJSURF from executing a contract with any other vendor.

VII. Other Terms and Conditions

RFP Amendments

The SJSURF reserves the right to change the schedule or issue amendments to the RFP at any time. The SJSURF also reserves the right to cancel or reissue the RFP.

Vendor's Cost to Develop Proposal

Costs for developing proposals in response to the RFP are entirely the obligation of the vendor and shall not be chargeable in any manner to the SJSURF.

Withdrawal of Proposals

Proposals may be withdrawn at any time prior to the submission time specified in this RFP, provided notification is received in writing. Proposals cannot be changed or withdrawn after the time designated for receipt.

Rejection of Proposals – Waiver of Informalities or Irregularities

The SJSURF reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of The SJSURF.

Proposal Validity Period

Submission of the proposal will signify the vendor's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between The SJSURF and the successful vendor.

Public Records

Under California state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this Request for Proposals (the "documents") become a public record upon submission to the SJSURF, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. If the SJSURF receives a request for inspection or copying of any such documents provided by a vendor in response to this RFP, it will promptly notify the vendor at the address given in response to this RFP that it has received such a request. Such notice will inform the vendor of the date the SJSURF intends to disclose the documents requested and affording the vendor a reasonable opportunity to obtain a court order prohibiting or

conditioning the release of the documents. The SJSURF assumes no contractual obligation to enforce any exemption.

Contract Award and Execution

The SJSURF reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be initially submitted on the most favorable terms the vendors can offer. It is understood that the proposal will become a part of the official file on this matter without obligation to the SJSURF.

The general conditions and specifications of the RFP and as proposed by the SJSURF and the successful vendor's response, as amended by agreements between the SJSURF and the vendor, will become part of the contract documents. Additionally, the SJSURF will verify vendor representations that appear in the proposal. Failure of the vendor's products to meet the mandatory specifications may result in elimination of the vendor from competition or in contract cancellation or termination.

The vendor selected as the apparently successful vendor will be expected to enter into a contract with the SJSURF.

If the selected vendor fails to sign the contract within ten business days of delivery of the final contract; the SJSURF may elect to cancel the award and award the contract to the next-highest-ranked vendor.

No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

EQUAL OPPORTUNITY COMPLIANCE

SJSURF is an equal opportunity employer and does not discriminate on the basis of race, color, creed, gender, religion, marital status, registered domestic partner status, age, national origin, ancestry, physical or mental disability, medical condition, sex, genetic information, sexual orientation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

The Proposer, in the performance of this Agreement, agrees not to discriminate in its employment because of the employee's or applicant's race, color, creed, gender, religion, marital status, registered domestic partner status, age, national origin, ancestry, physical or mental disability, medical condition, sex, genetic information, sexual orientation, military and veteran

status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

OTHER COMPLIANCE REQUIREMENTS

In addition to nondiscrimination and affirmative action compliance requirements previously listed, the Proposer awarded a contract shall comply with federal, state and local laws, statutes and ordinances relative to the execution of the work. This requirement includes, but is not limited to, protection of public and employee safety and health; environmental protection; waste reduction and recycling; the protection of natural resources; permits; fees; taxes and similar subjects.

OWNERSHIP OF DOCUMENTS

Any reports, studies, conclusions and summaries prepared by the Proposer shall become the property of the SJSURF.

CONFIDENTIALITY OF INFORMATION

All information and data furnished to the Proposer by the SJSURF, and all other documents to which the Proposer's employees have access during the term of the contract, shall be treated as confidential to the SJSURF. Any oral or written disclosure to unauthorized individuals is prohibited.

ATTACHMENTS

ATTACHMENT A: NON-COLLUSION CERTIFICATION

The undersigned, being duly sworn, deposes and says that the person, firm, association, co-partnership or corporation herein named, has not either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to The SJSURF for consideration in the award of a contract on the improvement described as follows:

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By:

(Please print)

(Authorized Signature)

Title

Firm

Date

ATTACHMENT B: USE CASE SCENARIOS

Please see attached document.