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REQUEST FOR PROPOSALS # 28-15
Consulting Services to develop a
Unified Financial Management Organizational Structure,
Administrative Model, and
Implementation Plan

University of Maine System
ADDENDUM #2

The University of Maine

University of Maine
at Augusta

This Addendum will address the University's response to vendor inquiries.

University of Maine
at Farmington

Q1. Can we submit the proposal electronically on the 26th (which would give us more time to develop a thoughtful response) or do you require a paper submission?

University of Maine
at Fort Kent

A1. Per the RFP Section One 1.16, the proposal must be received via eMail with a PDF attachment by 5pm EST on Friday December 26, 2014. Paper submission is not permitted.

University of Maine
at Machias

Q2. The addendum states that proposals are due end of business day on Friday, December 26th. If we can send electronically, is it acceptable to send by 5pm?

University of Maine
at Presque Isle

A2. Per the RFP Section One 1.16, the proposal must be received via eMail with a PDF attachment by 5pm EST on Friday December 26, 2014. Paper submission is not permitted.

University of
Southern Maine

Q3. What is causing the current aggressive timeline, both for the RFP response and for the project itself, given the fact that the finance effort has been contemplated for several months?

A3. On November 17 the Board of Trustees authorized the Vice Chancellor for Finance and Administration "to develop a comprehensive financial management structure reflecting unified finance and administrative services that are functionally aligned to the degree possible consistent with Board of Trustees 2014 Strategic Outcomes Targets 2 and 3. The Vice Chancellor for Finance and Administration and Treasurer will submit the new structure and implementation plan no later than March 1, 2015 to the Board of Trustees for review and action." The timeline in the RFP is necessary in order to meet this Board directive.

Q4. Are any financial functions (e.g. payroll, accounts payable) currently being performed at the system level?

A4. Yes, payroll, accounts payable, and procurement are performed at the system level.

Q5. Do you have a specific savings target you are trying to reach from this initiative?

A5. No. The new structure is intended to be more responsive, transparent and efficient, to enable fiscal control and advance intra-system collaboration. Administrative savings are also expected to result. Administrative savings targets are being developed through

Administrative Review projects in functional areas such as IT, procurement, HR, and facilities.

Q6. Is there an incumbent currently working with UMS in support of Mission Excellence?

A6. There is no incumbent working in the financial area. Consultants have assisted functional Administrative Review projects such as HR and procurement.

Q7. Is there anticipated to be any follow on work through this contract for the Financial Affairs initiative or other Mission Excellence initiatives?

A7. There is no plan for additional contract work in the financial area. However, it is possible that as this work goes forward there will be needs for consulting assistance.

Q8. How are you defining the distinction between organizational design and service delivery model in terms of expected deliverables and recommendations?

A8. Organizational design refers to reporting relationships of major functional areas at the university and system levels. Service delivery model refers to the method of providing services to the end user at the university or system level and includes alternative delivery methods such as increased use of technology, shared services, self-service, centers of excellence, or outsourcing.

Q9. Has any progress has been made in defining potential options or will the awarded consultant be starting with a relatively blank slate? For example, on the website (<http://thinkmissionexcellence.maine.edu/priority-initiatives/finance/>) there is a PPT presentation (Comprehensive Financial Management Structure) that indicates some initial thinking has been done.

A9. The Board of Trustees has directed that the proposed model be “functionally aligned to the degree possible.” This is consistent with models 3 and 4 of those presented in the spectrum of change in the PPT.

Q10. What is your anticipated governance structure for the project that will work with the consultants to execute the project and develop recommendations?

A10. The project will be led by the Vice Chancellor for Finance and Administration. A project committee will be established consisting of the university CFO's and system leaders of the major administrative functional areas.

Q11. What level of engagement with stakeholders are you anticipating for this project both in the system office and the seven universities?

A11. The proposed project plan should include engagement of stakeholders at each university and the system office through interviews and/or group discussions held at campus and system locations.

Q12. Is there a RFP response length constraint?

A12. No. However, bidders are asked to keep the proposal succinct and focused on the requirements of the project.

Q13. Is there a RFP response budget constraint?

A13. As stated, costs for RFP preparation are the bidders alone (see section 1.10).

Q14. What is your expected budget for this project?

A14. With regards to the project budget, Bidders should propose a project plan to best accomplish the scope of the work in a cost effective manner, as described and required in section 3.5. Further, UMS reserves the right to determine a final scope, scale and cost of any engagement.

Q15. Is there a required percentage of consultant time onsite?

A15. No. Consultants should describe in their proposal the frequency and amount of time onsite (at system office and university locations) they believe will be necessary to accomplish the work. Proposals should also address how communications will occur when consultants are not onsite.

Q16. What is the basis of the consultant roles and hours listed in Section 3.5?

A16. The roles and hours are intended to provide a level playing field for comparing cost estimates. Bidders should clearly indicate the number of hours and roles they propose to accomplish the project work as well as stating the costs based on the hours listed.

Q17. Will visits to the multiple university locations be required?

A17. Yes. The project should include engagement of campus-based stakeholders through a combination of campus-based and system office activities.

Q18. What is the current financial system platform?

A19. PeopleSoft.

Q19. What is the anticipated integration with IT in this project?

A19. The IT function is currently centralized and reports to the Vice Chancellor. IT should be considered as a one of the functional areas to be addressed by the proposed model.

Rachel Piper
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Director of Strategic Sourcing

December 19, 2014