

**THE
UNIVERSITY
OF RHODE ISLAND**

**DIVISION OF
ADMINISTRATION
AND FINANCE**

THINK BIG  WE DO™

PURCHASING DEPARTMENT
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uri.edu/strategic-procurement/purchasing



December 20, 2024

Addendum# 1

RFP NO.: 101443
OPENING: Thursday, January 9, 2025
COMMODITY: Workday Strategic Advisory & Quality Assurance Services (SAQAS)

Please see the notices below along with the answer to the questions submitted by the deadline of December 16, 2024, by 12PM (EST).

- Requests to extend the deadline for RFP101443 will not be considered. The opening date and time remain set for Thursday, January 9, 2025, at 12 PM (EST).
- All suppliers submitting proposals are requested to carefully review Section 7: Proposal Contents. Please ensure that the following components are prepared as specified:
 - Technical Proposal with an Electronic Copy (on a CD or USB)
 - Cost Proposal with an Electronic Copy (on a CD or USB)
 - ISBE Documentation

Each of these components must be placed in separate sealed envelopes. These envelopes can all be included in one mailing package; they do not need to be mailed separately, just sealed individually within the package.

Questions & Answers

1. Please provide URI's total approximate headcount, with a breakdown of exempt vs. non-exempt employees. **ANSWER: 1,100 non-exempt employees and 2,300 exempt employees.**
2. Does your workforce include a significant number of contingent workers? If yes, please indicate the approximate percentage. **ANSWER: Yes. Approximately 1600 contingent workers**
3. Will you be asking the approved vendor to help enable the change of a new institutional culture? If yes, what level of executive sponsorship will URI provide? **ANSWER: Yes. VP of HR and VP of Administration and Finance, and CIO will be primary executive sponsors.**
4. In our experience, developing and aligning on programmatic guiding principles is critical to the success of an engagement of this size and complexity which requires time and collaboration across the various stakeholders (HR, IT, Finance etc.). What level of sponsorship will each function provide? **ANSWER: URI**

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recognizes the importance of collaboration and sponsorship across key stakeholder organizations, including HR, IT, and Finance, to ensure the success of a project of this scale and complexity. While URI has resource constraints across these functions, the Workday implementation is a top institutional priority, fully supported by the Vice President for Human Resources (VPHR), Vice President for Administration and Finance (VPA&F), and Chief Information Officer (CIO). Leadership is committed to ensuring that resources are available to support critical activities and will work with the vendor to effectively manage priorities and address constraints.

5. Please provide approximate team sizes of your core Finance and HR teams.

ANSWER: Finance (FSP, Finance, Strategic Procurement) 60 / HR 21

6. Do HR and finance functions provide the same level of service to each entity and school?

ANSWER: Yes

7. How many distinct collective bargaining units? **ANSWER: 10 Union Offices-Office of Human Resources.**

8. How distributed or centralized are the HR, financial and procurement processes at URI? **ANSWER: Most of the HR, financial, and procurement processes are centralized.**

9. Are there process variations based on schools and/or unions? If yes, can you estimate what percentage is currently standardized? **ANSWER: Yes, there are process variations based on individual colleges and unions. These variations primarily reflect the unique operational needs, governance structures, and collective bargaining agreements specific to each group. At this time, we do not have a formal analysis or metrics to estimate the percentage of processes that are standardized across the institution. However, as part of our Workday implementation, we anticipate conducting a thorough review to identify opportunities for increased standardization while accommodating necessary variations.**

10. Outside of the annual calendars for HR, IT, Finance – are there any other special projects or competing priorities we should be aware of? **ANSWER: Yes, in addition to the annual calendars for HR, IT, and Finance, URI is implementing Jaggaer for e-Procurement, with a planned go-live in April. This project requires significant cross-departmental collaboration and may impact Workday's Phase 0 and implementation phases. Key personnel in IT, Finance, and Procurement may have limited availability for Workday activities due to their involvement in Jaggaer**



URI is transitioning to an incentive-based budget model aimed at enhancing financial sustainability, transparency, and accountability. This model incentivizes innovation, operational efficiency, and alignment with strategic goals by linking resource allocation to performance and decision-making authority.

11. What is your fiscal year? **ANSWER: July 1st to June 30th.**
12. How many legal entities will use Workday for reporting? Do all legal entities have the same fiscal year? **ANSWER: 1 legal entity.**
13. What is the chart of accounts structure? (i.e., the number of dimensions and how they are used). **ANSWER: ChartFields:** Accounting fields that are used in each entry in the Financials system to identify how the transaction flows and where it belongs. ChartFields are combined to form ChartField strings
 - I. **ChartField Strings:** Concatenated values of the ChartFields which control transaction flows and workflow routings to Authorized Signatories. ChartField strings have the format of 4-5 sets of numbers: **ACCT-DEPT-FUND-PROGRAM-PROJECT-ACTIVITY.**
 - i. **Account:** Accounts are *asset, liability, and fund balance (equity)* items that appear on the balance sheet. Accounts are also *revenue* and *expense* items that appear on the statement of revenues and expenditures (profit and loss). This is a **four-digit field** and **is not required in all chart field strings searches**. The account number is **required on all expense documentation** requesting payment.
 - ii. **Fund:** A fund is an accounting entity established for the purpose of carrying out specific activities or attaining certain objectives in accordance with special regulations, or restrictions. For reporting purposes, funds of similar characteristics are combined into fund groups, such as *restricted funds, auxiliary enterprise fund, sponsored research, unrestricted funds*, etc. This is the only level where you can maintain cash balances. In PeopleSoft this is a **required three-digit field**.
 - iii. **Department:** A department is an organizational unit established for the purpose of carrying out specific activities or attaining certain objectives with its own organizational structure. For example, academic departments include Civil Engineering, Journalism, etc., while administrative departments include Purchasing, Facility and Operations, etc. In PeopleSoft this is a

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required four-digit field.

- iv. **Program:** Programs are groups of related activities directed toward the accomplishment of a set of objectives that are budgeted for separately. Programs might include start-up funds, research incentive funds, faculty recruitment, and so on. These activities may occur within a single department or across multiple departments. In PeopleSoft this is a required four-digit field.
- v. **Project:** Projects can represent capital or research/grant funding. Projects accumulate financial information related to a specific project or group of activities from all financial resources. Projects are separately budgeted and have a defined life cycle. Projects could be capital projects such as the Convocation Center or groups of activities such as the Higher Education Technology Initiative. Grants are contributions or gifts of cash or other assets from another government or entity to be used or expended for a specified purpose, activity, or facility. Project number is a seven-digit field that is not required in all chart field strings.
- vi. **Activity:** Serves are a sorting unit for projects to support budgeting and expense tracking.

14. As part of your plan to implement Workday's grants management functionality, we would expect you to utilize the system as a grantseeker. Do you also have requirements as a grantmaker that are expected to be addressed by Workday? i.e., do you provide grants or endowments to other recipients that need to be managed in the Workday system? **ANSWER: We plan to use Workday primarily for our post-award grants management processes as a grantseeker. At this time, we have not defined specific requirements or roles related to grantmaking or the management of grants/endowments provided to other recipients within the Workday system. However, if these needs arise during our implementation or future phases, we will evaluate Workday's capabilities and adapt accordingly.**

15. Do you currently use a pre-award system? **ANSWER: Yes. InfoEd**

16. What is the rough volume of annual Grants/Awards? **ANSWER: \$161.4 URI Research Awards FY2024**

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17. Will URI provide any resources to aid in the execution of change management (i.e., communications development)? If so, how many? **ANSWER: Yes. We have an IT OCM Manager, and an IT Communications Manager.**

18. Are there learning and development resources to support training of end users? **ANSWER: Yes. We have an IT Training manager**

19. In addition to the organizational and cultural challenges described in the RFP, please describe key challenges or unique business requirements that need to be considered as part of the Workday system design. For example, provide information about key gaps that resulted in the customization of the legacy PeopleSoft system if they are relevant for the Workday system. **ANSWER: Our PeopleSoft system is highly customized due to the development team's stronger expertise in PL/SQL over PeopleSoft's native tools and the lack of design standards, leading to inconsistent implementations. The primary customization centered on the financial approval workflow, which required a complex, multi-level approval structure to accommodate diverse departmental and funding needs. This included ChartField-specific approvals and additional oversight for grants, restricted funds, and capital projects. As we transition to Workday, these challenges highlight the need to standardize processes while leveraging Workday's functionality to streamline approvals and reduce custom development.**

20. What data conversions are anticipated, and to what extent is historical data expected to be converted versus open transactions at the time of the Workday go-live? **ANSWER: Data conversion requirements have not been identified at this time. URI will work with SAQAS vendor and SI to determine requirements.**

21. Has there been any discussion or exploration regarding implementing the Workday modules listed in the RFP over more than a single phase, given that the scope of the RFP includes evaluating URI's readiness for Workday Launch methodology? If so, please provide an overview of current thoughts and direction. **ANSWER: The current plan is to implement all modules in a single phase.**

22. Given the information that URI has a 35-hour work week, please indicate if you expect the chosen partner for this initiative to adhere to that same work schedule. **ANSWER: The vendor should be available during URI working hours 8am-4pm and be flexible if project requirements necessitate early or later working hours.**

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23. Does URI have a preference whether the majority of the project work should be performed remotely or on-site at your offices? **ANSWER: The majority of work will be performed remotely. There will be times when onsite work will be performed.**

24. Do you leverage any EDI systems to interface POs and invoices automatically? **ANSWER: ANSWER: We are in the process of implementing Jaggaer for e-Procurement. Go live April 2025**

25. Is there a budget for this project, if so, please share? **ANSWER: We do not disclose project costs during a solicitation process.**

26. Are we able to sign electronically using Adobe's digital signature validation in lieu of an in-ink signature? **ANSWER: Yes.**

27. Could you please provide a sample contract for our legal team to review?
ANSWER: Contracts are tailored to each specific project, so a general sample cannot be provided for review.

Camely Machado, Assistant Director of Purchasing
Purchasing Department
The University of Rhode Island