

# Great Hearts RFP Vendor Questions and Responses

## General

**Q:** There is reference to ISP Pricing Spreadsheet in the RFP documents (page 10). However, no such attachment was shared. Can you please share the same for our reference?

**A:** We will be sending out the Pricing Model prior to April 5, 2024.

**Q:** Does Great Hearts America have defined any phase-wise release schedule for each of the ISP implementations? If yes, can you please share the same?

**A:** To be defined prior to implementation

**Q:** Please attach an example of an aggressive systems migration plan

**A:** We expect the vendor to put together a proposal for an aggressive timeline based on your experience.

**Q:** Is the vendor expected to provide ongoing support and maintenance services for the implemented solutions? If yes, please respond to the following:

**Q:** What would be the Duration of support?

**A:** Duration of the contract

**Q:** What would be expected Level of support - L1, L2 or L3?

**A:** To be determined as we listen to vendor options – please submit your service level objectives when you turn in the proposal.

**Q:** Business support window such as 8\*5, 24\*5 or any other?

**A:** To be determined as we listen to vendor options – please submit your service level objectives when you turn in the proposal.

**Q:** Any pre-defined SLAs that the vendor needs to adhere to? If yes, please share.

**A:** Will be defined later in the process.

**Q:** All RFPs Currently are their software solutions for Enrollment, HRIS, CRM, and Enterprise Finance implemented in your environment? If yes, please mention the technology/ systems for managing these requirements.

**A:** We prefer cloud-based solutions.

**Q:** Are you looking for mobile application capabilities for Enrollment, ATS, HRIS, CRM, and Enterprise Finance?

**A:** This is not a requirement, but it is worth considering.

**Q:** Do you have any reporting tool like Power BI or Tableau?

**A:** We currently have limited use of Power BI.

**Q:** Was any consultant and/or subcontractor involved in a pre-RFP assessment and/or assisting in preparing the RFP?

**A:** No

**Q:** Will any consultant and/or subcontractor who performed a pre-RFP assessment and/or assisted in writing the RFP be eligible to respond to the RFP?

**A:** NA as no consultant and/or subcontractor was involved.

**Q:** Will any consultant and/or subcontractor be involved in the decision-making / awarding process of this RFP? If so, are you able to name them?

**A:** Not planning to use a consultant or subcontractor in the decision process.

**Q:** Is an incumbent consultant and/or subcontractor already providing similar software implementation services to Great Hearts? Will that consultant and/or subcontractor be eligible to respond to this RFP?

**A:** No and NA – currently not using any consultant and/or subcontractor for software implementation.

**Q:** Can you share the titles /roles of the evaluation committee members awarding this RFP?

**A:** Chief Finance Officer, Chief People Officer, Chief Development Officer, Chief of Staff and Vice President of Data Analytics, Senior Vice President of Operations and Systems, Arizona Superintendent, Director of Information Technology, and Senior Director of Enterprise Operations.

**Q:** Has a budget been established for this project? If so, can you please share the budget bracket to support scoping alignment?

**A:** Budget not yet defined.

**Q:** Partnering on this project specifically may lead to longer term partnership needs; are you open to project resourcing models that allow for fractional .25, .5, .75 resources if it makes sense for cost effectiveness without sacrificing quality?

**A:** Yes.

**Q:** Is it acceptable to submit responses for multiple RFPs, but not all 5 RFPs listed?

**A:** Yes

**Q:** XYZ has a network of implementation partners, is it preferred that we submit multiple bids for the same project, or, select one implementation partner to respond on behalf of XYZ?

**A:** This is your decision to make.

**Q:** What is Great Mind's top 5 KPIs that will be used to measure the success and impact of the CRM RFP?

**A:** Assuming you mean Great Hearts - these measures have not yet been defined.

**Q:** What is Great Mind's top 5 KPIs that will be used to measure the success and impact of the Enrollment System RFP??

**A:** Assuming you mean Great Hearts - these measures have not yet been defined.

**Q:** In addition to API support by each system, does Great Hearts have a preferred iPaaS/ESB/ETL for the exchange of data between systems or do you prefer vendors to propose as part of the response?

**A:** We prefer vendors to propose as part of their response.

**Q:** Please specify user groups for each part of the RFP and estimate user counts

**A:** Depends on the solution(s) selected through the bidding process. Will be defined later for the final candidates.

**Q:** Will there be any on-site requirement for implementation or remote work allowed?

**A:** Onsite management of the implementation is being requested based on need.

**Q:** Are there more documents of the RFP?

**A:** There are no other documents other than the RFPs and Critical Features excel file

**Q:** Would you be able to provide the timeline for the RFP evaluation process?

**A:** The timelines are called out specifically in the RFPs. Project Details / Phase II

**Q:** Can you please confirm with me: Company HQ Location?

Approximate annual revenue?

And also which industry would best describe your business: Manufacturing, distribution, retail, automotive or lumber & building supply?

**A:** Great Hearts America, 4801 E Washington St, Suite 250, Phoenix AZ 85034

**A:** FY23 approximately \$300M

**A:** We are in the Education Industry

**Q:** Are you open to considering a vendor that does not have all of the system platforms you listed below? For example, XYZ does not offer a finance and procurement system, but can integrate with any ERP.

**A:** ERP solutions will be considered but not required. Best in breed solutions are being considered but must have integration capabilities.

**Q:** Would you allow for an extension on questions specific to your RFP since we received the RFP documents just yesterday?

**A:** We cannot extend the date for questions.

**Q:** The RFP in the Proposal Format Section indicates a start date of June 1<sup>st</sup> 2024 with a Go-Live date of July 1<sup>st</sup> 2024. Was this intended to be July 1<sup>st</sup> 2025?

**A:** The dates called out in the RFPs were for "example only". We are asking you to provide us with an aggressive systems migration plan.

**Q:** Is Great Hearts Academies only considering systems that take less than 9 months to implement?

**A:** No.

**Q:** How many employees (full time and part time) does Great Heart Academies have?

**A:** 3,757

**Q:** Can vendors bid on just the ERP, HRIS & ATS systems with the ability to integrate to the CRM and Student Enrollment Systems of your choice?

**A:** Yes. ERP solutions will be considered but not required. Best in breed solutions are being considered but must have integration capabilities.

**Q:** What Is your desired Go-Live deadline date?

**A:** Go-Live deadline dates have not been established. We are asking you to provide us with an aggressive systems migration plan.

**Q:** What is the RFP evaluation timeline and product demonstrations requirement?

**A:** The RFP Evaluation timeline and product demonstration timelines are identified within the RFP: Screening Evaluations 4/23-5/1; Product Demonstrations 5/6 - 5/17

**Q:** What team is going to be running the RFP for each platform?

**A:** We have established a governance framework that consists of Great Hearts Executives, Great Hearts Department leaders, and system end users.

**Q:** When will the vendor perform due diligence calls and discovery of processes?

**A:** Suppliers of proposals selected for further evaluation will be notified of next steps.

**Q:** Are you looking for a single vendor to fulfill the full tech stack needs of CRM, HRIS, ATS, Finance, Enrollment? Or are you open to best in class solutions with appropriate integrations (ie comprehensive HRIS/HCM with integration to finance, CRM, etc)?

**A:** ERP solutions will be considered but not required. Best in breed solutions are being considered but must have integration capabilities.

**Q:** What is the evaluation process?

**A:** RFP Vendor Screening Evaluations consist of validating all requirements identified in the RFPs have been met, and that all questionnaire sections have been appropriately completed. The Evaluation Criteria and Metrics are listed in the RFPs. The process is a weighted scale for scoring during vendor product demonstrations.

**Q:** How are you prioritizing pricing to performance?

**A:** Pricing, performance, and value will all be considered.

**Q:** Does Great Hearts America plan separate implementation for its ATS solution, based on “aggressive systems migration plan” identifying May 1, 2024 start with July 1, 2024 completion? Will ATS be implemented ahead of other solution modules?

**A:** We are looking for systems that integrate and accepting all vendor proposals. We have not yet identified the Implementation Schedule.

**Q:** ATS RFP already closed, based on the March 8, 2024 deadline stated on page 5 of the ATS RFP document?

**A:** The March 8 date in the ATS RFP is a typo and should accurately read April 22, 2024 as the RFP close date.

## Enrollment System

**Q:** What's the expected number of logins from Student or Parent in a month for this system?

**A:** Currently we have over 16,000 enrolled students.

**Q:** How many types of application are there?

**A:** Roughly 9

**Q:** Do you want to have an integration with payment gateway? Are you utilizing any gateway today?

**A:** Yes, and yes

**Q:** What kind and on how many configured logics are there in place for admission offer? Please state examples for the same.

**A:** Our application statuses are different for our public charter and our private schools. Examples of statuses: registration complete, application rescinded, seat accepted, waitlist, and offer extended.

**Q:** What are the numbers of enrolled students that will be associated with these systems?

**A:** Currently 16,000 - 28,000+ with plans to exceed 40,000 in the next 3-5 years

**Q:** What are the lottery priority and processes used for enrollment?

**A:** We do use priority statuses at both our private and public schools. We expect the solution to handle the logic of both and the ability to adjust as needed.

**Q:** Are bids for Best of Breed Solutions that don't meet all of the requirements acceptable?

**A:** Yes, we will consider all proposals.

**Q:** Is Great Hearts seeking for Tuition Management system?

**A:** We are looking for an enrollment system that accommodates tuition submission and tracking but not required.

**Q:** What are the top priorities for reporting / dashboards / analytics for recruitment and enrollment?

**A:** Geolocation, reports filtered by application statuses, and applicant status progression throughout the process all by region by school.

**Q:** What tools/platforms does Great Minds envision integrating with the recruitment & enrollment solution?

**A:** Assuming you mean Great Hearts - We will reveal this information at later date in the selection process.

**Q:** Does Great Hearts envision a portal for Student Recruitment & Enrollment?

**A:** Not at this time but interested in hearing what solutions you have to offer.

**Q:** How does Great Hearts approach seat tracking?

**A:** Through the various defined statuses of the application process (re-enrollment, offers extended, and registration complete).

## HRIS

**Q:** How many Legal Entities and Tax Reporting Units do you have?

**A:** 35+ all based out of the United States.

**Q:** Are your employees distributed in multiple legislations? Please share details on the same.

**A:** Employees are distributed across multiple states. Please see RFP for additional details.

**Q:** Do you allow employees to work on two different jobs actively in the organization at a time. One maybe primary and other non-primary ?

**A:** Yes

**Q:** Do you wish to integrate the new HRIS with any third-party time capturing device, punching machines, Biometric scanners etc.?

**A:** Ideally our HRIS solution will include time punches digitally through a mobile application or desktop web address.

**Q:** Apart from the Employment history, what are the other Business objects you would like to have the whole history imported into new HRIS?

**A:** To be defined prior to implementation

**Q:** What is the current Training/Learning Management tool?

**A:** Will be revealed later for the final candidates.

**Q:** Do you wish to integrate the new HRIS Learning Management tool with any third-party content provider, like LinkedIn?

**A:** This is not a priority at this time.

**Q:** How many Benefits provider do you wish to integrate with?

**A:** We expect to support up to eight (8) benefits programs/providers in our system.

**Q:** How many Benefits programs do you have in current HRIS?

**A:** We expect to support up to eight (8) benefits programs/providers in our system.

**Q:** What is the frequency of Payroll in your organization, Monthly, Bi-weekly, or weekly etc.?

**A:** Bi-weekly but ideal solution will be configurable to allow for multiple frequencies.

**Q:** How many payrolls parallel runs (for results reconciliation) do you wish to have with the current payroll system before going live with payroll?

**A:** To be defined prior to implementation.

**Q:** How many Performance cycles do you wish to have in the new HRIS? For example, Half Yearly Evaluation, Annual Evaluation, Probation Period evaluation etc.

**A:** Multiple, varied.

**Q:** Do you wish to integrate HRIS with any Third-party Payroll Provider. For example, XYZ for Garnishments services?

**A:** Yes

**Q:** What is the ratio of Salaried and Hourly employees?

**A:** Salaried = 69% Hourly = 31%

This is active employees, regular employment type (no subs, volunteers, etc) and inclusive of all Great Hearts entities

**Q:** Professional Development 'Automated communications to employees when PD is offered (based on ee status/time, etc.)' Please elaborate further on this requirement.

**A:** Ability to schedule and/or automate notifications to employees based on certain criteria (such as job title, academy, expiring licenses, etc) to share information about available trainings/professional development events.

**Q:** Will you consider a system that does not have payroll built into it but can connect to current/future payroll system?

**A:** Yes

**Q:** " Custom business structures/rules (can hold multiple unique component companies)." Please elaborate further on this requirement.

**A:** Ability to support multiple separate component companies with the ability to further customize the configurations of each one.

**Q:** Do you have a system they you are hoping to integrate with XYZ? Or is Great Hearts looking for a recommendation/partner that can handle their POS needs?

**A:** Please reference the detailed Critical Functions/Features excel spreadsheet (referred to as Exhibit A) that was attached to the RFPs for these specifics.

## Finance

**Q:** Are you using any third-party tool to import finance related transaction data into the system? Please provide the details, if any. How many other financial systems are being used?

**A:** We will not know this information until this bidding process has been completed to know what solutions have been awarded.

**Q:** How are the project budgets being managed currently? Do you budget outside the system?

**A:** We currently use a vendor to upload into our current finance system – ideally, we move to an all in one solution or best in breed with integration.

**Q:** What are the different financial reports you run to make data driven decisions? What are the financial reporting tools being used?

**A:** We are looking for a solution that provides reports to enable data driven decisions. We currently use excel and MS PowerBI.

**Q:** What is the volume of your financial transactions with respect to financial processes?

**A:** Expected volume to be defined prior to implementation.

**Q:** Will you be open to adopting industry best practices on financial transaction processing or you have a custom process that you would like to be customized in the future Finance system?

**A:** Yes, we are open.

**Q:** Are you using any approval workflow for your processes? Could you please list it down wherever it is applicable?

**A:** We have some approval workflow processes related to online procurement and invoice and expense submissions.

**Q:** Please elaborate on the consolidation process being followed currently. Are you looking for changing the same?

**A:** We will consolidate where vendor solutions provide the opportunity, otherwise we integrate.

**Q:** Are you looking for standard functionalities of Grant Management and Tuition Management? Are you looking for custom solution for it?

**A:** We are open to standard best practices.

**Q:** How do you send payment files to the bank? Are you looking for automation of sending payment files to the bank?

**A:** We currently do ACH. We are looking for automation.

**Q:** How is the bank reconciliation being done currently? Are you looking for automation in the reconciliation process?

**A:** Yes, we are always looking for opportunities to utilize automation.

**Q:** How are the Payable Invoices being created currently? Do you create invoices as and when required/ or you receive them via emails/ or any method? What is the volume?

**A:** We do not invoice anyone for our services. Our AP team does not generate invoices for payment, we receive invoices for payment via email into an automated processing system.

**Q:** How many user personas are considered for the Finance ERP?

**A:** To be defined prior to implementation.

**Q:** Is there an integrated month-end management tool currently in use for the month-end closing process, or are we planning to proceed solely with the proposed system?

**A:** Soley with the proposed system.

**Q:** What file formats does the bank offer that are suitable for automated bank reconciliation?



**A:** Software selected needs to be able to leverage APIs to directly connect to banking institution (currently AB&T but may change) and download bank feed. Manual uploads of bank files is not a route we want to use. Last but not least, automated bank feeds need to be able to support high count of bank accounts (almost 100 currently). For reference, Financial Edge currently supports up to 20 bank accounts for Bank Feed, which is a HUGE limitation.

**Q:** Support for the option to assign expenses to vendors automatically or not capture vendors as appropriate – Please elaborate.

**A:** We need to be able to assign “default GL distribution” to each vendor, with the ability to override at an invoice level. For example: we can say invoices coming from XYZ will be automatically coded to Office Supplies. The user needs to be able to override if that specific invoice should actually go to Textbooks (examples).

**Q:** Support for budget versions (e.g. Original, 3+9, 6+6, 9+3, etc.). Please elaborate.

**A:** Support for creating multiple budget versions/scenarios for the same fiscal year. One of the most common use would be the Forecast, with a ability to populate closed fiscal periods with actuals rather than planned figures

**Q:** Are you currently incorporating retail operations within the same legal entity, or do you have a distinct line of business specifically for retail? Regarding e-commerce, are you planning to utilize the existing website and integrate it with the ERP system? Please confirm.

**A:** We currently do not offer retail.

**Q:** Are you currently maintaining catalogs for both expense and inventory items to facilitate procurement processes?

**A:** Would like to adopt best practices as provided by vendor solutions.

**Q:** Is Great Hearts America leveraging standard or any third-party tools for the supplier registration onboarding process?

**A:** We currently don't have. Desire new system to meet that need.

**Q:** Within the current system, are you able to effectively monitor inventory and asset items?

**A:** We currently don't have. Desire new system to meet that need.

**Q:** Is the contract order utilized in the procurement process within Great Hearts America?

**A:** We currently don't have. Desire new system to meet that need.

**Q:** Will there be any additional modules be utilized for procurement apart from sourcing, supplier management, and purchasing?

**A:** Currently don't have a procurement system.

**Q:** Are you actively maintaining on-hand balances and overseeing the distribution of inventory items? Is there a serial or lot control feature used in the current system to track the items?

**A:** We currently don't have. Desire new system to meet that need.

**Q:** Can you share Approval for all processes like Requisition, PO, Sourcing, Supplier registration?

**A:** Currently don't have a procurement system.

**Q:** Is this referencing specifically an ERP system, or would Payroll fall under this category?

**A:** ERP solutions will be considered but not required. Best in breed solutions are being considered but must have integration capabilities.

## CRM

**Q:** Capability to oversee donor restrictions and track the purpose of donor-restricted funds – Please elaborate.

**A:** This is a feature we are seeking to include in our selected solution.

**Q:** What are your expectations on communication between CRM and other systems like HRIS, Finance and ATS?

**A:** Please see the RFP for expectations on system integration.

**Q:** What is the expected volume of data to be migrated into CRM? Please state all source systems from which the data needs to be migrated.

**A:** Expected volume to be defined prior to implementation. Primary source systems will be revealed later for the final candidates.

**Q:** Will Great Hearts America provide cleansed data for data migration? or is this service expected from ISP partner?

**A:** Data cleansing will be required by ISP partner(s).

**Q:** How many user personas are considered for the CRM?

**A:** To be defined prior to implementation.

**Q:** Do you have any middleware and analytical tool in your system landscape?

**A:** Not currently

**Q:** Do you have any existing Content management system? Do you want to migrate documents, audio, and video into the content management system? If yes, what is the volume of the same?

**A:** Yes. However, we are not looking for Content Management System solution.

**Q:** Have you already procured any software licenses?

**A:** Great Hearts is seeking proposals through the RFP.

**Q:** We observed that there is a requirement of AP/AR in CRM. Can you confirm if this is a typo and it's captured from the finance tool?

**A:** It is identified in the CRM requirements as it is a key integration with the CRM and Finance solutions.

**Q:** Do you have separate platform for donation platform for which you need a connector with CRM?

**A:** Yes

**Q:** What is the expected daily volume of API's?

**A:** Expected volume to be defined prior to implementation.

**Q:** What systems are leveraged today for marketing, campaign?

**A:** Current systems will be revealed later for the final candidates.

**Q:** What is the monthly volume of campaign and emails?

**A:** Expected volume to be defined prior to implementation.

**Q:** Do you have any active directory, and do you need a SSO using AD?

**A:** Yes, and yes.

**Q:** Do you want to have a universal data storage as CRM?

**A:** To be further defined during the evaluation process.

**Q:** What is the use case for appeals?

**A:** There are several examples, one of which would be Public School Tax Credit.

**Q:** Please provide an example of an interactive entity-specific text exchange.

**A:** The ability to text back and forth with a constituent using the CRM.

**Q:** What tool(s) does Great Hearts use for Event Management?

**A:** Current systems will be revealed later for the final candidates.

**Q:** How does Great Hearts track engagement with external school partners for the purpose of fundraising/cultivation/stewardship?

**A:** We are interested in vendor sharing industry best practices.

**Q:** What tool(s) does Great Minds use for accounting?

**A:** Current systems will be revealed later for the final candidates.

**Q:** What payment gateway and processor does Great Hearts use?

**A:** Current systems will be revealed later for the final candidates.

**Q:** Does Great Hearts have a document generation tool (ex: Conga)? If so, which tool?

**A:** No

**Q:** What tools/platforms does Great Minds envision integrating with the CRM beyond Classy, Double the Donation, SKY API Console?

**A:** Assuming you mean Great Hearts - To be determined based on vendor(s) selected.

## ATS

**Q:** What is the current ATS system? Are you looking to replace it?

**A:** Will be revealed later for the final candidates.

**Q:** What kind of business flow and customization you are looking for? State some examples.

**A:** Allow us to post a job within the ATS to multiple application sites, such as LinkedIn or Indeed, or, when a candidate applies via an external job platform, their application information is imported and consolidated in our ATS accordingly.

**Q:** If we integrate CRM and ATS in one platform and replace current ATS, can we assume applicant and manager will be login through a portal?

**A:** Yes

**Q:** I do just want to clarify that XYZ is a standalone, applicant tracking system. Were you looking for an HRIS that includes everything?

**A:** ERP solutions will be considered but not required. Best in breed solutions are being considered but must have integration capabilities.