

# GUILFORD COLLEGE

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Good morning Guilford,

I hope everyone has had a great semester so far. I am excited to bring forth a change in the Finance and HR offices. Since I have arrived here at Guilford, I have looked into our current Finance and HR platform in Banner. After an investigation into what is necessary to re-implement the Banner Finance portion of the software to address shortcomings from the original implementation, and after reviewing this with the Finance Council of the Board and our team in Finance and Administration, we are opting to move to another solution.

As part of this process, I wanted to communicate with you about upcoming research to identify a future partner for the College's next-generation Enterprise Resource Planning software. The purpose of this document is to invite both Workday and Oracle ERP vendors to participate in the Guilford College (College) procurement process. We are asking both to provide us with demos of their Enterprise Finance, Human Resources and Payroll software, and Student Management Platform services. Specifically, the goal is to solicit qualifications for products and services that address the College's needs. This goal includes addressing the College's Operational Systems and implementing a state-of-the-art Finance and HR system in this first phase, then moving to a new Student (SIS) system at a later time.

Over the next few weeks, the College will ask key stakeholders, including functional users, to sit in on demonstrations of the vendors' products. After that phase, we will ask for this group and others to participate in a hands-on experience with their counterparts from current institutions using those products. Our aim is to allow the key users to ask questions to a current user about the product and ascertain if the program will be a good fit for Guilford College over the next ten to twenty years. More information will be provided from my office throughout the process.

The goals listed below state the key objectives.

- Enhance institutional integrity through aspirational leadership and academic innovation, including well-managed relationships with domestic and international academic institutions to provide joint academic and co-curricular programs, exchange opportunities and deep immersion experiences; integration of social media and virtual experiences to enhance accessibility and academic achievement; increased placement of graduates in advanced degree programs and professional schools; robust student and faculty scholarship; and full integration of reflective judgment and critical thinking in all aspects of our living and learning environment.

- Establish transformative living and learning communities by creating state-of-the-art, student-centered learning environments; providing contemporary technologies to prepare students who are academically, intellectually, and technically equipped to work in, lead, and serve their communities; providing places and support that nurture intellectual curiosity; and creating virtual and physical environments conducive to academic achievement and success.
- Create the capital to support ongoing institutional self-sufficiency, security, and innovation, characterized by diversification of revenue streams, alternative funding mechanisms, and opportunities, and decreased student and institution dependence on state and federal tuition assistance; competitive salaries and benefits designed to attract and retain exemplary faculty and staff; an increase to the endowment and increased unrestricted funds to allow Guilford flexibility in supporting new initiatives; a substantial increase in graduation rates; and active engagement in local and regional economic development.

This procurement is targeted at helping the College achieve this goal. The College intends to pursue a new Finance and HR ERP system. We will ask both Workday and Oracle, through the HESS Consortium Oracle agreement, to offer proposals for the procurement, implementation, and ongoing success of enterprise Finance, Human Resources, Payroll, and, in the future, Student application software.

The College is eager to enhance its efforts in the following areas:

- Single simplified Cloud architecture
- Streamlined business processes that can easily be configured and changed by staff
- Inherent, powerful, and end user-friendly reporting and analytical capabilities including leveraging live and snapshot data
- Highly mobile and improved service delivery for students, faculty, staff, and vendors
- Reduce the number of disparate systems needing to be interfaced
- Greater access to critical resources
- Preference for mobile-first, cloud-native architectures to reduce complexity
- Responsiveness to state/federal/internal reporting requirements
- Efficient and effective access to data, information, and transaction processing

At a minimum, the College intends to purchase a single cloud SaaS Financial Information system and Human Resources/Payroll System. In addition to these main applications, the College will also consider the Grant Accounting and Contract Management Systems. Ideally, the proposed modules should share the use of an integrated database management system that would also be part of this procurement. If a single vendor solution cannot meet the requirements of both the Finance and Human Resources/Payroll areas of the College, we reserve the right to procure solutions in a “best of breed” approach, as long as the technologies of those solutions provide for effective and real-time integration through Web Services and robust APIs.

The College’s goal is to eliminate the need for related software products (e.g., compilers, report writers, 3rd party data integrators). Finally, we will procure as-needed services for training,

functional consulting, project management, data conversion, software customization, software integration, maintenance, etc.

## **Procurement Process**

The College's procurement process will entail four major steps:

### **Step One:**

Vendors will be invited to submit proposals in response to qualifications that must, at a minimum, meet the College's requirements and should focus on products and services that best satisfy the College's needs. Cost information is desired from vendors in this first step.

### **Step Two:**

Qualified vendors will be asked to perform in-depth product demonstrations. Such demonstrations will be based upon the College's specific functional needs and requirements.

### **Step Three:**

After a thorough evaluation of vendors' qualifications and on-site demonstrations, the College will solicit finalized pricing from the two vendors. Furthermore, the College may ask the vendors to refine their qualifications for various products and services. After which, the College will make a final recommendation to the College's Board of Trustees to authorize a contract.

### **Step Four:**

Generate a contract with the finalist using the Statement of Work (SOW). We will take this to the Board meeting in May seeking approval and then proceed with the project over the next twelve months. We hope to go live with the new ERP by June 1, 2023.

Please let me know if you have any further questions and have a wonderful day.



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