



STATE OF INDIANA

REQUEST FOR INFORMATION/INNOVATION 27-87809

INDIANA DEPARTMENT OF ADMINISTRATION

**ON BEHALF OF THE
ALL STATE AGENCIES**

**SOLICITATION FOR:
ERP MODERNIZATION STRATEGY**

**RESPONSE DUE DATE:
OCTOBER 2, 2026, BY 3:00PM ET**

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REQUEST FOR INFORMATION/INNOVATION 27-87809

INTRODUCTION

This is a Request for Information/Innovation (RFI) issued by the Indiana Department of Administration (IDOA) to develop a strategy to modernize the State's Enterprise Resource Planning (ERP) technology. It is the intent of IDOA to solicit responses to this Request for Information/Innovation in accordance with the specifications contained in this document and associated attachments. Neither this RFI nor any response (proposal) submitted hereto is to be construed as a legal offer.

THE STATE MAY ELECT TO LIMIT PARTICIPATION IN ANY FUTURE COMPETITIVE SOLICITATION TO VENDORS THAT RESPOND TO THIS RFI.

BACKGROUND AND PURPOSE

The State is seeking information to identify a qualified consulting firm to help us assess our current Enterprise Resource Planning (ERP) systems and develop a modernization strategy. Our current systems handle core business operations such as human resources, financial management, and procurement across multiple executive branch agencies, but it is aging. Before the State moves forward with a major procurement for new, modern ERP systems, we need an independent expert, preferably with public sector general or state government specific experience, to evaluate our current systems and to develop a modernization strategy that includes process improvements, technology alternatives, procurement options, risk management plans, and project management requirements. The expected outcome of this engagement is to guide the State in next steps toward replacement and provide a roadmap and planning budget to the eventual replacement of our current ERP systems.

The selected consultant will not be building, selecting, or implementing the new software. This information will guide our executive leadership team in making strategic decisions and preparing for a future ERP transition.

SECTION OVERVIEW AND RFI QUESTIONS

1. Current State

The State's current ERP systems support a wide range of critical business functions throughout the state. The ERP systems support both centralized and decentralized business functions throughout state agencies. On the finance side, this includes, but is not limited to, Accounts Payable, Accounts Receivable, Report of Collections, Billing, Treasury, Asset Management, Budget Development and Management, General Ledger, Federal and other Grants Management, and Procurement. On the human resources side, it includes but is not limited to Absence Management, Benefits, Core HR, Payroll, Recruiting, and Time and Labor, and other related functions like performance management. We need a consultant who can step back from an implementation mindset and thoroughly document how these business functions currently operate, where the inefficiencies lie, and how well our current technology matches our business needs. We also need our consulting partner to document inefficiencies and major migration pitfalls in current processes, data, and application architecture that would make migration to a new ERP system more challenging.

- **Question 1:** Describe your methodology for conducting discovery and interviews with state business owners to document the current state of a complex, multi-agency ERP system. What sample questions and strategies do you use to capture accurate workflow data?
- **Question 2:** How do you approach reviewing a state's legislative and administrative code to identify areas where existing laws or policies might conflict with modern ERP best practices?

2. Options Analysis

Once the current state is understood, the State needs an analysis of the best paths forward. This includes looking at whether we should upgrade our existing platform, move entirely to a new solution, or look at a hybrid approach. We also would expect an ERP migration readiness assessment. The consultant must help us weigh the pros and cons of different ERP solution providers without showing bias toward any specific software.

- **Question 3:** Explain your firm's independence from ERP software vendors. How do you ensure your recommendations are completely unbiased and focused solely on the State's best interests?
- **Question 4:** Explain how you would identify and weigh alternative solutions based upon current state analysis.
- **Question 5:** Provide an example of how you have helped a large government client evaluate the pros and cons of moving from a legacy ERP system to a modern ERP solution.

3. Procurement Plan

The final goal for the State is to issue a formal Request for Proposal (RFP) for a new ERP system. The consultant may help us write the technical requirements, scopes of work, and evaluation criteria for that future procurement. We need to know how the firm will help us structure that process so we attract highly qualified bidders and get the best value for the public.

- **Question 6:** How do you help government agencies translate their documented business requirements into clear, competitive scopes of work and technical requirements for a future ERP system RFP?
- **Question 7:** Describe your approach to establishing executive governance, steering committees, and decision rights for a statewide ERP modernization initiative.

4. Project Management Plan

Managing an assessment of this size requires proven project management methodologies to keep everything on schedule and within scope. The data collected during this project must be organized and delivered to the State in a clean, professional format. We prefer data formats that are easy to manipulate so our team can create pivot tables, dashboards, and reports on demand.

- **Question 8:** Provide a recommended timeline and key milestones for an ERP assessment project of this size and complexity. What project management methodologies do you use to ensure deadlines are met?
- **Question 9:** How do you structure and deliver the raw data collected during client interviews and discovery so that the State can easily manipulate it for future reporting, pivot tables, and dashboards?
- **Question 10:** Describe your approach to evaluating master data quality, data governance, reporting requirements, and data migration readiness.

5. Organizational Change Management Plan

An ERP transition is not just a technology project; it is a major change for thousands of employees and vendor partners. The consultant needs to evaluate our organizational readiness for change. We need a plan for how to handle stakeholder communication, training needs, and leadership alignment early in the process and throughout this eventual effort.

- **Question 11:** How do you facilitate the design of a future-state operating model that aligns processes, organization, technology, and governance? Many ERP failures occur because organizations replace software without redesigning business operations or, in the public sector, changing governing statutes and other requirements.
- **Question 12:** Describe your approach to assessing an organization's readiness for change. What communication strategies do you recommend using to kick off a project with stakeholders and interviewees?

- **Question 13:** How do you identify opportunities to standardize business processes across agencies while balancing agency-specific requirements?

6. Risk Management Plan

Large state technology projects face many risks, including timeline delays, resource constraints, and client-induced bottlenecks. We need a consultant who can proactively identify these risks and propose proven escalation processes to keep the project moving forward.

- **Question 14:** What are the most common risks you see during the assessment and discernment phase of a state government ERP project, and how do you recommend mitigating them? Describe your escalation process for handling project delays.
- **Question 15:** How do you assess existing application dependencies and integrations that may affect ERP modernization decisions?

7. Return on Investment (ROI)

Before the State invests millions of dollars into a new ERP system, executive leadership needs a clear understanding of the financial and operational return on investment. The consultant will need to help us build a business case that estimates the long-term cost savings, efficiency gains, and total cost of ownership.

- **Question 16:** Describe your framework for calculating the initial investment, ongoing Total Cost of Ownership (TCO) and estimated Return on Investment (ROI) for a modern ERP implementation. What data points do you focus on to build a strong business case for executive branch leadership?

8. Cost Estimate and Financial Modeling

To support executive decision-making and strategic budgeting for future phases, the State requires clear cost projections and visibility into potential hidden expenses. **The ultimate deliverable of this assessment is an implementation roadmap accompanied by a realistic budget estimate** for our future ERP implementation.

- **Question 17:** Please provide an estimated cost for your implementation roadmap (including minimum, maximum, and typical implementations).
- **Question 18:** Describe any cost reduction strategies you typically recommend to clients.
- **Question 19:** If possible, include comparisons of multiple implementation options (e.g., phased vs. full implementation) and their respective cost ranges.
- **Questions 20:** The state may choose to engage a consulting partner to deliver the roadmap contemplated throughout this document. Please provide a comprehensive project plan and detailed cost proposal outlining all activities, deliverables, timelines, staffing plans, and assumptions necessary to execute the services described in this RFI.

RESPONSE FORMAT AND ATTACHMENTS

Respondents should submit responses to the RFI describing how they will meet the specific requirements of this RFI and the deliverables included within. All narrative responses must be provided to the State in Microsoft Word format. Respondents must structure their response according to the sections outlined below to facilitate the State's review of the responses. **THE TOTAL RESPONSE SHOULD NOT BE MORE THAN 30 PAGES IN LENGTH.**

If you would like to provide a response/feedback to this RFI for a potential RFP for the State of Indiana, you must provide your response as shown in the RFI Timeline and Response Submission section below.

RFI TIMELINE

The following timeline is only an illustration of this RFI process. The dates associated with each step are not to be considered binding.

Anticipated RFI Dates:

Activity	Date
Issuance of RFI	August 27, 2026
Deadline to Submit Written Questions (3:00PM Eastern Time)	September 4, 2026
Response to Written Questions/RFI Amendments	September 17, 2026
Due Date for Submissions (3:00PM Eastern Time)	October 2, 2026

QUESTION / INQUIRY PROCESS

All questions/inquiries in regard to RFI 27-87809 must be submitted in writing via email using **Attachment A**, Questions and Answers Template, by the deadline of **September 4, 2026, by 3:00PM ET** to rcohen@idoa.in.gov. The email subject line should contain the following phrase:

“REQUEST FOR INFORMATION/INNOVATION 27-87809, QUESTION AND INQUIRIES.”

Following the question/inquiry due date, IDOA will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website as soon as possible. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Please note that Robert Cohen is the State’s single point of contact for this RFI. **Inquiries are not to be directed to any other staff member of IDOA.** Such action may disqualify respondents from further consideration in this RFI and any subsequent RFP process.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be posted on the IDOA website.

CLARIFICATIONS AND DISCUSSIONS

The State reserves the right to request clarifications on information submitted to the State. The State also reserves the right to conduct discussions, either oral or written, with the Respondents. These discussions could include requests for additional information, requests for cost information or technical requirements response attachment revision, etc. Additionally, in conducting discussions, the State may use information derived from the responses submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. The State will provide equivalent information to all Respondents which have been chosen for discussions.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

CONFIDENTIALITY

It is important to note that all information submitted in Respondent's proposals to this RFI will be kept confidential and will not be made available to the public unless this RFI does not result in the release of a solicitation at a later date. If a solicitation results from this RFI, then the information contained in the proposal submissions for this RFI must be made available to the public once the resulting solicitation has been awarded and the protest period has ended.

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq., and, after award, the entire solicitation file may be viewed and copied by any member of the public, including news agencies and competitors.

Please note citing "Confidential" on an entire section is not sufficient. The Public Access Counselor (PAC) provides guidance on APRA. Respondents are encouraged to read guidance from the PAC on this topic as this is the guidance IDOA follows:

- [18-INF-06; Redaction of Public Procurement Documents Informal Inquiry](#)

Respondents claiming a statutory exception to the APRA must indicate so on a separate attachment labeled "**Confidential Documentation Listing**". That document should include the following information:

- List all documents where claiming a statutory exemption to the APRA;
- Specify which statutory exception of APRA that applies for each document;
- Provide a description explaining the manner in which the statutory exception to the APRA applies for each document.

When claiming confidential information, respondents should submit two versions of their response:

- 1) A confidential version (for the State's review and evaluation)
 - a. Confidential Information must be clearly marked in a separate folder.
- 2) A redacted version (for public records requests)

If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. The State also reserves the right to seek the opinion of the PAC for guidance if the State has doubts the cited exception is applicable.

Prices are **NOT** confidential information.

RESPONSE SUBMISSION INSTRUCTIONS

Firms interested in providing information to IDOA should submit responses via email to rcohen@idoa.in.gov. All responses must be received no later than **October 2, 2026, by 3:00PM ET**. The subject line of the email submission must clearly state the following:

"RESPONSE TO REQUEST FOR INFORMATION/INNOVATION 27-87809"

Any information received after the due date and time may not be considered.

No more than one proposal per Respondent may be submitted.

Templates outlined in this document should be returned in their native file format.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

EVALUATION PROCESS

In addition, the State reserves the right, at its sole discretion, to evaluate responses and make an award directly from this RFI should it determine that doing so is in the best interest of the State.

Responses will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the solicitation in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category.

If any one or more of the listed criteria on which the responses to this solicitation will be evaluated are found to be inconsistent or incompatible with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded, and the responses will be evaluated and scored without considering such criterion or criteria.

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Technical Response)	50 available points
3. Cost The cost normalization formula is as follows: Respondent's Cost Score = (Lowest Cost Proposal / Total Cost of Proposal) X 30	30 available points
Total	80 points possible