

## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:16 PM  
**To:** Jessica Rios  
**Cc:** Michael Baudler  
**Subject:** Intent to Award Contract - PTG - MHEC-RFP-04182024

**Dear Jessica Rios,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that PTG has been recommended for the award to provide ERP solutions as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with PTG.

The evaluators have recommended your proposal based on PTG's strong expertise as a trusted Workday partner, offering scalable and student-focused ERP solutions. Your innovative approach to cooperative contracts, combined with your proven track record in public sector ERP deployments, aligns well with MHEC's strategic objectives to enhance institutional efficiency, reduce costs, and improve student outcomes.

As part of this negotiation, MHEC looks forward to leveraging Workday's unified ERP platform and PTG's experience in tailoring solutions for diverse higher education institutions, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- PTG will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

- Contract launch: July 1, 2025.
- Term: Seven years with an initial three-year term and an option for a four-year renewal.
- Co-term end date: June 30, 2028, for the initial term.

To maintain the integrity of this process, all parties involved must keep all aspects of the negotiation and details of the proposals confidential until the award is finalized, and the master agreement is fully executed.

Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate PTG's continued dedication to meeting the needs of the Compact's member states and your commitment to leveraging Workday's ERP capabilities to drive institutional success and operational efficiency. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

N. Jay Sorensen, MBA  
Senior Director of Government Contracts  
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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:15 PM  
**To:** 'Elyse Courtney'  
**Cc:** 'Jennifer Pikel'  
**Subject:** Intent to Award Contract - Anthology - MHEC-RFP-04182024

**Dear Elyse Courtney,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that Anthology has been recommended for the award to provide ERP solutions as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with Anthology.

The evaluators have recommended your proposal based on Anthology's innovative, student-centric ERP solutions that align with MHEC's strategic objectives. Your focus on leveraging cloud-based platforms, such as Microsoft Dynamics 365 and Azure, and your commitment to improving student outcomes and operational efficiency make Anthology an excellent partner for this initiative.

As part of this negotiation, MHEC looks forward to incorporating your solutions, such as Anthology Student, Reach, Finance, and Blackboard LMS, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- Anthology will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

- Contract launch: July 1, 2025.
- Term: Seven years with an initial three-year term and an option for a four-year renewal.
- Co-term end date: June 30, 2028, for the initial term.

To maintain the integrity of this process, all parties involved must keep all aspects of the negotiation and details of the proposals confidential until the award is finalized, and the master agreement is fully executed.

Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate Anthology's continued dedication to meeting the needs of the Compact's member states and your commitment to enhancing student and institutional success through scalable and innovative ERP solutions. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:15 PM  
**To:** Matt Bain  
**Cc:** Howell, Dean; Simpson, Ted  
**Subject:** Intent to Award Contract - Deloitte - MHEC-RFP-04182024

**Dear Matt Bain,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that Deloitte has been recommended for the award to provide services as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with Deloitte.

The evaluators have recommended your proposal based on Deloitte's extensive experience in large-scale ERP implementations, particularly your phased approach to modernization. Your innovative use of advanced technologies like AI and machine learning, coupled with your focus on scalability and risk management, aligns well with MHEC's strategic objectives to enhance institutional readiness, operational efficiency, and student outcomes.

As part of this negotiation, MHEC looks forward to leveraging your expertise in phased implementation, data security, and total cost of ownership analysis, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- Deloitte will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

- Contract launch: July 1, 2025.
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Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate Deloitte's continued dedication to meeting the needs of the Compact's member states and your commitment to modernizing ERP systems across higher education institutions. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:15 PM  
**To:** Gillian Bullock  
**Cc:** Clint Davies; Nikki Welch; Chase Goode; David Houle; Joseph Traino; Alton Austin  
**Subject:** Intent to Award Contract - Berry Dunn - MHEC-RFP-04182024

**Dear Gillian Bullock,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that Berry Dunn has been recommended for the award to provide services as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with Berry Dunn.

The evaluators have recommended your proposal based on Berry Dunn's extensive experience in ERP lifecycle management and consulting, particularly your expertise in organizational readiness and strategic guidance. Your tailored approach to scalability, operational efficiency, and risk mitigation aligns well with MHEC's strategic objectives to enhance student outcomes, institutional sustainability, and fiscal resilience.

As part of this negotiation, MHEC looks forward to leveraging your expertise, organizational readiness frameworks, and strategic insights, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- Berry Dunn will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

- Contract launch: July 1, 2025.
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Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate Berry Dunn's continued dedication to meeting the needs of the Compact's member states and your commitment to guiding institutions through ERP transformations. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:14 PM  
**To:** Wilkerson, Todd  
**Cc:** John.Runte@bakertilly.com; Vanessa.Weaver@bakertilly.com  
**Subject:** Intent to Award Contract - Baker Tilly - MHEC-RFP-04182024

**Dear Todd Wilkerson,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that Baker Tilly has been recommended for the award to provide services as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with Baker Tilly.

The evaluators have recommended your proposal based on Baker Tilly's extensive experience in higher education ERP projects, particularly in change management and strategic planning. Your focus on organizational readiness and your roadmap for driving user adoption align well with MHEC's strategic objectives to enhance student outcomes, operational efficiency, and cost management.

As part of this negotiation, MHEC looks forward to leveraging your expertise and incorporating your frameworks for organizational readiness and governance, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- Baker Tilly will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

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Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate Baker Tilly's continued dedication to meeting the needs of the Compact's member states and your commitment to modernizing higher education administrative, academic, and financial systems. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Thursday, December 19, 2024 3:14 PM  
**To:** India Meeks  
**Cc:** Cecil Cadwallader; Solutions  
**Subject:** Intent to Award Contract - ERPA - MHEC-RFP-04182024

**Dear India Meeks,**

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that ERPA has been recommended for the award to provide ERP solutions as part of the Next Generation Higher Education ERP System of Systems initiative. This letter serves as formal notification of our intent to enter into contract negotiations with ERPA.

The evaluators have recommended your proposal based on ERPA's proven expertise in higher education ERP implementations, including your leadership in AWS migration, modernization, and AI-driven tools such as ActiveGenie™. Your comprehensive approach to scalability, risk management, and operational efficiency aligns well with MHEC's strategic objectives to advance institutional capabilities, modernize operations, and improve student outcomes.

As part of this negotiation, MHEC looks forward to collaborating with ERPA to incorporate your advanced cloud solutions, risk management frameworks, and support for legacy system modernization, while ensuring alignment with the requirements of the solicitation and the submitted proposal. Given the limited time to finalize the agreement, it is crucial to address all necessary approval processes promptly to ensure smooth finalization, with the intent to expedite the process and aim for a contract launch by July 1, 2025.

### **Next Steps for Finalizing the Agreement**

#### **1. Review and Feedback**

- MHEC will review vendor responses to RFP requirements and provide actionable feedback to align solutions with institutional goals.

#### **2. Order Process Alignment**

- ERPA will outline the ordering process, specifying how it integrates with the Master Agreement framework.

#### **3. Finalize Pricing Exhibit and Approvals**

- Confirm any specific pricing elements requiring additional approvals and prioritize them early in the process.

#### **4. Address Potential Roadblocks**

- Identify challenges that could delay approvals and plan proactive measures, including additional meetings if needed.

#### **5. Coordinate Final Sign-Off**

- Ensure mutual understanding of the final steps required for contract execution, including scheduling flexibility for sign-off.

### **Timeline**

- Contract launch: July 1, 2025.
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- Co-term end date: June 30, 2028, for the initial term.

To maintain the integrity of this process, all parties involved must keep all aspects of the negotiation and details of the proposals confidential until the award is finalized, and the master agreement is fully executed.

Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at **612-677-2767** to discuss any questions. MHEC will schedule follow-up calls after reviewing your responses to the MHEC requirements. We look forward to aligning on next steps and moving forward efficiently.

We appreciate ERPA's continued dedication to meeting the needs of the Compact's member states and your commitment to modernizing institutional ERP systems through cutting-edge solutions. We look forward to finalizing this agreement and establishing a successful partnership.

**Thank you for your engagement and support.**

Sincerely,  
Nathan

N. Jay Sorensen, MBA  
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## Nathan Jay Sorensen

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**From:** Nathan Jay Sorensen  
**Sent:** Tuesday, October 29, 2024 2:47 PM  
**To:** Phillip Wood  
**Cc:** Andrew Powell; Dave Schreiber; Mario Siguenza  
**Subject:** Intent to Award Contract - Oracle - MHEC-RFP-04182024

Dear Mr. Wood,

Pursuant to the criteria set forth in the Midwestern Higher Education Compact's (MHEC) Request for Proposal (RFP) MHEC-RFP-04182024, we are pleased to inform you that Oracle America, Inc. has been recommended for the award to provide the Next Generation Higher Education ERP System of Systems solutions. This letter serves as formal notification of our intent to enter into contract negotiations with Oracle.

The evaluators have recommended your proposal based on Oracle's robust and scalable ERP systems, which effectively meet the diverse needs of both large universities and smaller colleges within the MHEC region. Oracle's emphasis on innovation, future-proofing, and comprehensive life-cycle support aligns well with MHEC's long-term strategic goals, including enhancing student outcomes and improving operational efficiency.

As part of this negotiation, MHEC supports Oracle's proposal to utilize the existing Oracle Master Agreement (OMA), schedules, pricing exhibit, and related amendments, with updates to align with the requirements of the solicitation and the proposal submitted. Given the limited time and the need to finalize the OMA, it is crucial to address the approval processes required from both MHEC and Oracle to ensure a smooth finalization. The new OMA must be finalized before the current term ends on February 5, 2025.

### Next Steps for Finalizing the OMA

1. **Clarify Approval Processes:** Request Oracle to outline their internal approval steps, including any potential bottlenecks, so we can coordinate with our internal teams to align timelines.
2. **Identify Key Changes:** Agree on key changes for each party to submit the agreement for approval and set a clear timeline for these actions.
3. **Address Potential Roadblocks:** Identify possible challenges that could delay approvals, and plan proactive measures, including additional meetings if necessary.
4. **Extension of Current OMA (if Needed):** If delays are anticipated, consider extending the existing OMA to avoid any operational gaps.
5. **Finalize Pricing Exhibit and Approvals:** Confirm if specific pricing elements require additional approvals and prioritize these areas early to expedite the process.
6. **Coordinate Final Sign-Off:** Ensure both parties understand the final steps required for contract execution, including scheduling flexibility for sign-off.

To maintain the integrity of this process, all parties involved must keep all aspects of the negotiation and details of the proposals confidential until the award is finalized, and the master agreement is fully executed.

Please contact me at [nathans@mhec.org](mailto:nathans@mhec.org) or via phone at 612-677-2767 to discuss any questions or to schedule our next steps for finalizing the agreement. We are eager to **set up an initial call** to align on timelines and move forward efficiently.

We appreciate Oracle's continued dedication to meeting the needs of the Compact's member states and your commitment to modernizing the administrative, academic, and financial systems of MHEC institutions. We look forward to finalizing this agreement and establishing a successful partnership.

Thank you for your engagement and support.

Sincerely,

Nathan

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Midwestern Higher Education Compact  
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