Master Q&A List for Shared Services Assessment Feasibility Study RFP
21 November 2025

Note that additional details on FCI are available in the Introduction to Five Colleges, Incorporated and FCI Strategic Roadmap that are linked on the RFP webpage: https://www.fivecolleges.edu/rfp-shared-services-assessment.

TOPIC	QUESTIONS	ANSWERS
Campus Engagement in RFP	To what extent were the FCI member institutions involved in shaping the content and requirements of this RFP? Should we assume that FCI's campuses are on board with this project and/or the provision of modified/additional shared services? Or, is that part of the in-scope request relating to Change Management? Are there designated champions for the shared services initiative within specific institutions, and how would you describe the overall level of interest or readiness for shared services across the Consortium?	The RFP was written at the request of the Board of Directors (the 4 college presidents and the university chancellor) following a day-long retreat of senior campus leaders and FCI senior staff that guided its content. The RFP was approved by the Principal Business Officers and the Board prior to its release. Other senior leaders are aware of the project to varying degrees. Deeper engagement at other levels on the campuses will depend on the findings and recommendations of the study. The FCI Board is enthusiastic about gaining a clearer picture of what might be possible through a significant expansion of shared services. Viability and ROI will be key to gaining additional support and buy-in.
Selection Process	Aside from the published evaluation rubric, are there any critical outcomes or priorities (such as minimum cost savings targets or service quality improvements) that will significantly influence the selection process?	The selection process will be as described in the RFP.

Campus Engagement in Consortial Services	Are there services currently provided by FCI to the Colleges that the Colleges can opt out of? Is the expectation that any proposed new shared services are for all five of the member institutions, or are opt-outs anticipated?	Opt outs exist and are possible going forward. No campus is required to participate in any given shared program or initiative, and the budget is built to charge only participating campuses. The usual rule of thumb is that at least three entities need to participate for a shared service or program to run through FCI, but that is not a hard and fast rule. It's worth noting that FCI's budget is assessment-based, not dues-based. Each year's budget is built based on the portfolio requested by the campuses and each campus' share is calculated based on agreed-upon formulas for each line item.
Current State of Shared Services	Do the domains represent work currently performed across the campuses? If so, is that work currently centralized and decentralized/fragmented on the campuses? Is there a current process for the Colleges to request additional services? FCI's Role as Shared Services Enabler: How flexible is FCI's 'financial model' in supporting pooled budgets or chargeback mechanisms? Does FCI already host any 'shared technology platforms' (e.g., HR, procurement, data)?	The domains represent work currently performed on each campus, mostly individually, though in some areas some consortial collaboration is in place. The structure, location, funding, etc. of the work under consideration for sharing varies by campus. FCI's structure is designed to be extremely flexible. and adaptive. FCI does currently host some shared platforms. The largest of these are the shared catalog systems for the libraries and the museums. The governance and advisory bodies, along with other standing committees may request additional services be included for review through the annual FCI budget process. Additional details on FCI's governance, budget process, and funding formulas are in the Introduction to FCI document and the Strategic Roadmap available on the RFP webpage.

Project Scope	Are there any specific areas of interest that FCI leadership would like the project team to examine as part of this assignment? Among the functional areas listed in the RFP, are there any that FCI views as initial priorities or areas of greater focus, or should we assume the study will address each with equal depth? Section 4.1 mentions in-scope functional domains. Would FCI be interested in our potential exploration of other functional domains and/or departments? Beyond the domains listed in the RFP (e.g., IT & Digital Services, Student Administrative & Support Services, Libraries, etc.), are there additional functional areas the Consortium would like us to include – or exclude – from the assessment? Are there any areas of FCI and its member campuses that would be considered out of scope for this engagement? Will the study include 'technology platform rationalization' and total cost of ownership comparisons? Is FCI (and the Colleges) interested in including Software Rationalization as part of the scope of this project or future projects?	The scope is as described in the RFP. FCI and the member campuses are open to proposals that include exploration of other functional domains and/or departments beyond those explicitly included in the RFP, and to prioritization within the list of domains. No functional areas have been excluded from consideration in advance of the proposal process. Proposals may include a recommendation and plan to review the technology stack across the campuses.

| Data Collection, Stakeholder Engagement, & Benchmarking | What level of institution leadership will be available for workshops and interviews?

Has FCI already identified stakeholders that will be part of this process, or should the respondent include recommendations for that in their approach?

Does FCI have an expectation/preference as to how data collection through interviews should be performed as part of this project (e.g., one-on-one interviews, focus groups, etc.)?

Do you have an estimate of the number of interviews/collaboration sessions with FCI and the campuses that would be required in order to achieve FCI's project objectives?

How many "stakeholder interviews or workshops" are anticipated per domain? We are attempting to understand the effort required to assess the current state, including process metrics, challenges, data, and technology used for each process.

FCI is looking for benchmarking as part of this project. Approximately how many similar organizations should be (sic) plan to gather data from as part of the requested benchmarking?

Have FCI and its campuses identified a list of peer and aspirant organizations? If so, can that be provided? | Senior level campus leaders (presidents/chancellor, principal business officers) and FCI officers will be available and campus leaders can authorize additional levels of access at their discretion.

The number of information gathering sessions will depend on the nature of the data recommended by the proposers. As noted elsewhere, a key challenge in any consortial project is in locating and aligning the most relevant data for the topic at hand.

FCI has not identified a set number of organizations against which to benchmark. We welcome a recommendation on this from proposers. Each member campus has a list of peer and aspirant organizations, but these may not be relevant for this particular project. FCI routinely benchmarks against the members of the Association for Collaborative Leadership (https://www.national-acl.org/) and especially the Claremont Consortium, the Big Ten Academic Alliance, and the Colleges of the Fenway, though again, these may not be appropriate comparisons for this particular project.

FCI welcomes recommendations on process from the proposing team and anticipates negotiating details at the start of the project. |

Data Access	What is the approximate number of FTEs currently involved in each domain?	Gathering this information is expected to occur as part of the project.
	Would you be able to provide organizational charts for FCI and key functions within the member campuses (e.g., those related to potential in-scope shared services)?	Organizational charts can be made available at the start of the project.
	Please confirm that the inventory of existing shared services and consortial contracts will include those at FCI and its campuses?	A high-level overview of existing (cross-campus) shared services that operate through FCI is contained in the Introduction to FCI document, and a more detailed inventory will be provided at the start of the project.
	In performing the cost analysis, does FCI anticipate that information will be available on FCI and its campuses in order to establish a current-state baseline upon which ROI could be estimated?	We anticipate working with the project team to provide data on relevant current expenditures.
	Current State & Data Access: Are there any known data quality or completeness challenges (e.g., inconsistent vendor coding)? Will you designate a data liaison to facilitate access and validation?	Gathering and aligning comparable data across campuses is a routine challenge in consortial work. The FCI governance and advisory bodies described above will help facilitate access.
Timeline	Does FCI have established milestones or a preferred completion date for each aspect of the engagement?	FCI has no established or requested milestones for this project beyond those listed in the RFP.
	Is there a preference for piloting certain shared services domains first, or should the roadmap prioritize opportunities based solely on feasibility and impact?	The roadmap should prioritize opportunities based on feasibility (which may include factors such as unit readiness) and impact.

Deliverables: Financial Modeling	Financial Model Expectations: Should savings be modeled at the 'Consortium level' or separately for each institution? Should the financial model include campus-level breakdowns, or only consortium-wide estimates? What granularity is required for the roadmap (e.g., task-level, phase-level, or milestone-level)?	Where possible, anticipated savings for each institution for a proposed shared (i.e., consortial) service should be provided.
Deliverables: Change Management	Change Management & Implementation Planning: Does FCI expect the consultant to propose a 'change management framework' only, or also develop draft materials (e.g., communications plan, stakeholder map)?	Given the ideal timeline for this project (under 6 months) and the goal being a set of recommended shared services for further refinement and development, we anticipate that a change management framework is the most that could be provided at the conclusion of this phase of the work.
Communication	Considering the size and scope of this project, does FCI have expectations or preferences related to the communication of status throughout this project (e.g., frequency, attendees, anticipated level of detail required for communication of status)?	Key FCI governance and advisory bodies meet 1-2 times each month (often but not always in person) and will typically expect updates on significant projects at each regularly scheduled meeting. Some of this reporting may be done in writing or via the executive director and treasurer as officers of FCI, but periodic in-person or Zoom visits with the project team would be productive. At a minimum, we would anticipate 3 robust periods of engagement with key leaders – at project launch, at a midpoint, and near project conclusion.

| Governance & Decision-Making | How are the member institutions going to be involved in this process? Will the selected firm be working through FCI for things like the discovery process or interacting directly with member school liaisons?

Does FCI expect to have a primary project sponsor or steering committee to which the successful firm will report? If so, who does FCI expect to act in this capacity?

We note the RFP references steering updates and regular coordination. Could you confirm whether a formal steering committee or other approval body will guide review and sign-off of deliverables?

In helping FCI with option development, has the organization determined a decision framework in order to facilitate leadership's decision making, or will that be part of our engagement? | FCI's executive director and treasurer will serve as principal liaisons with the selected firm, in close communication with campus personnel. We anticipate the selected firm will need to be in direct communication with key campus liaisons to access necessary data and information. FCI Board members and Principal Business Officers will provide oversight and guidance, in keeping with FCI governance procedures and practices.

FCI's Strategy Screen (page 9 of the Strategic Roadmap) has served as a helpful decision framework for the consortium. Recommendations for adaptation of this tool may be part of the engagement. |
| Budget | On occasion, we have designed our approach and activities (e.g., method and frequency of facilitation, staffing, etc.) based on the client's budget. As such, has FCI determined an overall budget for this assignment? | The FCI Board has not predetermined a budget cap or target for this project. |

Project Logistics	Are onsite visits expected, or is a mostly virtual engagement acceptable? Should we plan for in-person engagement during the project, or does FCI anticipate the work will be conducted primarily through virtual meetings and workshops? Will FCI provide access to a dedicated coordinator for scheduling and logistics?	FCI is open to proposals for virtual, onsite, or hybrid project work. It is worth noting that FCI as an organization requires predominantly onsite work for employees and the campuses are all residential institutions that value in-person engagement. That said, the geographic spread of the campuses is sufficiently broad that cross-campus meetings do happen via Zoom from time to time. An FCI staff member will be tasked with coordinating scheduling and logistics.