REQUEST FOR PROPOSALS:
TECHNICAL SERVICES FOR PEOPLE SOFT IMPLEMENTATION

A. Introduction

The Public Health Institute (PHI) is a statewide, national, and global leader in public health. PHI is dedicated to promoting health, well-being and quality of life for people throughout California, across the nation and around the world. PHI generates and promotes research, leadership and partnerships to build capacity for strong public health policy, programs, systems and practices. Through this Request for Proposals (RFP), PHI seeks bidders to provide services as outlined in the Scope of Work (SOW) in Appendix 1 to be contracted through task orders issued under an Indefinite Quantity Contract (IQC).

B. Proposal Format

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. **Corporate Credentials** – A description of the bidder and a list of references
2. **Price Proposal** – A description of the bidders rate schedule (hourly/daily)
3. **Contact Information** – A statement of main point of contact for negotiations
4. **Sample Roster** – A roster of potential technical contractors available through the bidder
5. **Questionnaire** – A questionnaire to gather the bidders' PeopleSoft competencies

C. Submission of Proposals & Closing Time

Please submit proposals to: **Sathya Narayanan. IT Director**
Email: sathya@phi.org

Proposals are due by: **Friday, April 10, 2015**
5:00pm – Pacific Standard Time

D. RFP Schedule

- RFP Distribution.................................………….............. Friday, March, 27, 2015
- Proposals Submittal ………………………………..… Friday, April, 10, 2015
- Proposals Evaluation …………………………….…….. Within 30 Days of Submittal

E. Type of Agreement

PHI intends to issue an Indefinite Quantity Contract (IQC) to each of the successful bidders from this procurement process. PHI will, at its sole discretion, negotiate and award an IQC to as many or as few bidders PHI deems qualified, responsible and capable of performing the work outlined in Appendix 1. PHI may also, at its sole discretion, choose to award specific sub-sections of the work outlined in Appendix 1 to as many or as few bidders as PHI deems uniquely qualified, responsible, and capable of performing that specific sub-section. PHI may, at its sole discretion, after the evaluation process choose to not issue an IQC award. PHI may also, at its sole discretion, after awarding IQCs choose to not issue any task orders.

The IQC will outline the terms and conditions applicable to the task orders that may be issued under the IQC. The IQC will be provided for advance review to successful bidders. PHI envisions that task orders will be issued either as 1) time and materials agreements where the contractor is paid at approved rates for time expended and material costs reimbursed according to actual costs incurred **OR** in limited situations as 2) fixed price agreements where the contractor is paid a fixed amount inclusive of all costs and fees for successful completion of deliverables. The IQC will outline fixed rates and prices for task orders that may be issued under the IQC, which may be subject to change based upon mutual agreement of both parties to the IQC.

F. Technical Specifications and Guidelines

Bidders shall comply with the attached specifications in Appendix 1 and the following terms:

1. Offers/Quotations

Prices must be inclusive of all costs, including taxes and fees. Quotes prices should remain valid for ninety (90) calendar days from proposal submission.

Provide a detailed rate card showing the various rate breakdown for each consultant profile and experience/competency level. Include any module or skill specific reference as required to distinguish each rate level. See Appendix 2 for example.

2. Terms of Payment

Payment will be made based on agreed upon terms defined in individual task orders, pending final approval of PHI agreed upon in the task orders.

3. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

G. Solicitation Guidelines and Conditions

PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials, and cost thereby ensuring and overall best value procurement.

1. Proposal Evaluation

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Corporate Credentials
- Past Performance
- Technical Capacities
- Cost Reasonableness
- Cost Competitiveness

2. Cost Evaluation

A bidder's initial offer should contain the best terms from a price and technical standpoint. If necessary, PHI reserves the right to conduct discussions with bidders. PHI may reject any or all

offers if such action is in the interest of PHI; accept other than the lowest offer; and waive informalities and minor irregularities in offers/quotes received.

APPENDIX 1 –
SCOPE OF WORK:
TECHNICAL SERVICES FOR PEOPLESOFT IMPLEMENTATION

A. Background

PHI's Central Office located in Oakland, California has purchased and is in the process of designing and testing for implementation, modules of Oracle's PeopleSoft enterprise support system. PHI seeks a bidder that can source and deploy qualified short term technical experts to assist PHI with the various tasks associated with the design, testing, implementation, and roll-out. Below follows a summary of the various technical expertise areas required of short term technical experts and the performance capacities required of the bidding entity.

B. Technical Expertise Areas

Functional Subject matter experts
PeopleSoft functional expertise in one or more PeopleSoft modules across PeopleSoft Human Capital Management (HCM) or Financials and Supply Chain Management (FSCM).
Functional Subject Matter Experts (SME) shall have deep business process experience and PeopleSoft functional expertise in guiding business users and teams through business requirements design, performing fit/gap analysis, writing functional specifications, and preparing process flow diagrams to help business users decide and related PeopleSoft software design to solve business needs. Functional SMEs would help Public Health Institute and its staff with implementing PeopleSoft producing various bodies of work including, but not limited to, provide solutions consulting on business process mapping to PeopleSoft functionality, functional design specifications documentation, business specifications documentation, workflow design, reports design and use case or test case documentation.

Technical Subject matter experts
PeopleSoft technical expertise in one or more PeopleSoft modules and PeopleSoft application layer programming stack and related tools across PeopleSoft Human Capital Management (HCM) or Financials and Supply Chain Management (FSCM). Technical Subject Matter Experts (SME) shall have deep technical experience leading, designing, building and testing PeopleSoft's programming tools to develop solutions based on specifications designed by a functional subject matter expert or business user. Technical subject matter experts may have expertise in one or more technical areas of PeopleSoft technical skill set, including, but not limited to, programming People Tools, App Engine, People Code, Component Interface, AWE, Security, Infrastructure setup, administration, maintenance patches, tax updates, data base administration, security administration, web services, xml, etc.

PeopleSoft Project Management
Project management professionals with deep expertise in PeopleSoft implementation projects and overall project management or program management. PeopleSoft project manager would have deep PeopleSoft functional and/or technical expertise along with several years of managing PeopleSoft project implementations with successful track record. Project management expertise would involve areas including, but not limited to, project leadership, program and project

management experience in PeopleSoft implementation projects, execution and delivery of successful PeopleSoft projects, full life cycle oversight experience from inception, design, development, testing, integrations, conversions, interfaces, security, testing, training and cutover /go-live experience, PeopleSoft subject matter experience in one or more modules of HCM and/or FSCM, project budgeting, project tracking, monitoring and control, scope creep management, schedule and vendor management, project software expertise, resource leveling, escalation management etc.

PeopleSoft Training

PeopleSoft training professionals with deep subject matter expertise in one or more PeopleSoft functional or Technical areas combined with a corporate training background and having successfully developed and deployed training plan, materials, and training business users. PeopleSoft training professional would help Public Health Institute (PHI) with one or more areas of PeopleSoft functional training or technical training across HCM and FSCM modules, and PeopleSoft infrastructure and technical areas. This might include, but not limited to, PeopleSoft Training requirements analysis, develop plan, and material preparation and train PHI staff.

C. Performance Capacities of Bidder

- Provide consultants with PeopleSoft specific consulting background
- Ability to do complete Background, drug, reference checks
- Provide specific PeopleSoft staffing references
- Able to replace a consultant within 2 weeks at no additional charge if consultant does not work out or leaves before project is completed.

D. Competency Questionnaire

The objective of the questionnaire is to provide PHI with an inventory of skills, availability of consultants with the firms or individual contractors participating in the bidding process. The questionnaire is aimed to collect as many details from bidders that are as relevant as possible regarding the various competency areas of PeopleSoft software and the implementation.

PHI might, at its sole discretion, elect to use one or more bidders' resources or combine a few resources from various firms to address a specific need within the project.

Filling out the entire form on all skill areas IS NOT REQUIRED to be considered for award. For example, if your firm only specializes in one area of competence or is a subject matter expertise for a specific module (such as PeopleSoft General Ledger), you would provide details relevant to that specific module or skill in the questionnaire. PHI, at its sole discretion, might offer to hire your expertise in that area provided that you meet our need in that specific area of work.

1. All bidders are expected to fill in the questionnaire
2. Not all sections need to be completed in order for us to select the vendor
3. Bidders fill in the sections of competency that they feel represents their best offering
4. Any misrepresentation in the proposal may disqualify bidders from getting the award

E. List of PeopleSoft Modules

For informational purposes only, below follows the list of PeopleSoft modules referenced in this document.

Financials and Supply Chain Management (FSCM) Modules
- Cash Management
- Accounts Receivable
- Billing
- Asset Management
- General Ledger / Commitment Control (KK)
- Purchasing
- eProcurement
- Accounts Payable
- Project Costing
- Expense Module
- Contracts
- Supplier Contract
- Grants

Human Capital Management (HCM) Modules:
- Core HR/Workforce
- Base Benefits
- Benefits Administration
- eBenefits
- Compensation
- Payroll
- ePay
- Absence Management
- Time & Labor
- Organizational Development
- Workforce Monitoring
- Workforce Development
- Enterprise Learning
- ePerformance
- eCompensation
- Recruiting
- Manager and Employee Self Service

Others:

- People Tools version 8.53
- PeopleSoft Interaction Hub
- PeopleSoft Update Manager
- Active Directory integration for single sign-on
- User productivity kit (UPK)

Appendix 2 – Sample Rate Plan

Consultant Profile	Experience level	Core Skills	Module(s)	Onsite rate (all incl.)	Remote Rate	Offshore Rate (hr.)
PeopleSoft Project Manager	5-7 yrs. exp.	• PMP • PeopleSoft- Project Mgmt. • HCM Functional (9.2)	Core HR Ben Admin Base Benefits N.A. Payroll	$xx	$xx	$xx
PeopleSoft Program Manager	10-15 yrs.	• PMP • PeopleSoft- Project Mgmt. • FSCM Functional • FSCM Technical • Overall PeopleSoft (hands-on)				
PeopleSoft Techno Functional Consultant		•				
Senior PeopleSoft Functional Consultant	10-15 yrs.	• Functional FSCM • Security design • Business analyst				
Senior Technical Consultant		•				
Senior DBA Consultant		•				
Security Administrator Consultant		•				