



Solicitation Information

July 13, 2015

Addendum #1

**RFP #7549707**

**TITLE: On-Call Peoplesoft Consulting Services**

**SUBMISSION DEADLINE: August 6, 2015 AT 2:00 PM (ET)**

**PLEASE NOTE: SUBMISSION DEADLINE HAS BEEN EXTENDED FROM JULY 24, 2015 TO AUGUST 6, 2015 AT 2:00 PM (ET).**

**ATTACHED ARE SOME CLARIFICATIONS OF THIS REQUEST FOR PROPOSALS, AS WELL AS VENDOR QUESTIONS WITH STATE RESPONSES. NO FURTHER QUESTIONS WILL BE ANSWERED.**

**Gail Walsh  
Chief Buyer**

## RFP #7549707

### On-Call Peoplesoft Consulting Services

#### Clarifications

- About the specialty subject areas
  - Although the RFP's title has "PeopleSoft" in it, it does not mean that we are only looking for "PeopleSoft consultants". As indicated in the RFP, RIC may need different type of experts in different areas:
    - PeopleSoft Human Resources (HR)
    - PeopleSoft Campus Solutions (CS)
    - PeopleSoft Financials (Fin)
    - PeopleSoft Interactive Hub (Portal Technology)
    - PeopleSoft Technologies (including, but not limited to, PeopleTool, BEA/WebLogic, and all PeopleSoft related technologies)
    - PeopleSoft Underlying Technologies (including, but not limited to, Windows server administration, Network technology, Load Balancing, LDAP, etc.)
  - RIC understands that it might be impossible to find a vendor that has expertise in all of these areas. That's the reason why RIC is open to select multiple vendors in various areas so that RIC can find subject experts from these firms to provide the support that RIC needs in these areas.
  - RIC encourages all qualified vendors to submit their bids. The Committee will review each subject area separately and select winning vendors separately.
  - Please also note that we also look for vendors who are specialized in underlying technologies (such as Windows, SQL, etc.), because our PeopleSoft systems are built on top of these technologies.
- About the term "On-Call"
  - Although the title is written as "On-Call PeopleSoft Consulting Services", it is crucial for all vendors to understand that Rhode Island College is not looking for a vendor to build a 24x7 consulting service team to handle any average PeopleSoft related issues.
  - Rhode Island College has its own professional staff team handling day-to-day PeopleSoft user needs. We do not intend to use consulting services for this purpose.
  - RIC's need for "On-Call" Consultant Services
    - Scenario 1: True Emergency
      - Occasionally, Rhode Island College might have system production issues at critical moment when no in house expertise could trouble-shoot the issue right away. This is the time when Rhode Island College would call consulting services to trouble-shoot the issue. The sooner the college could get a consultant the better.
      - Since RIC implemented PeopleSoft in 2000, RIC has not experienced this type disruptive system issues yet, except once (critical) and a few times (less critical). At that time, RIC was grateful that one consultant could jump in immediately to get the issue resolved.

- Moving forward, RIC would like to have a peace of mind that the vendor(s) that win the bid could provide this kind of services so that RIC will be protected from unexpected production issues, especially at some critical times (such as at the beginning of a school year, etc.).
  - Scenario 2: General Trouble-Shooting
    - In this case, the “On-Call” service is applicable to many general service calls. These calls are needed when RIC in house staff have encountered roadblocks that they could no longer move project forward. This may be related to a simple fixes & patches, or even a serious system upgrade. Sometimes, it may be related to a system bug that Oracle has not yet fixed.
  - Scenario 3: General Project for New Feature/Functions/Module Implementation
    - In this kind of situation, RIC is looking for a consultation services provided by the vendor(s) who are specialized in certain project implementation. Given the fact that RIC’s in house staff have limited expertise in certain areas, RIC will call consulting services to help implement some of the new features/modules in PeopleSoft for RIC. Since this is the case when consultants will need to help RIC’s in house staff to get the project implemented, this type of services will usually require a lot more time commitment from the consultants.
    - As of now, there are no special projects waiting, except PeopleSoft 9.2 upgrades. The following is the status of the upgrade status:
      - Financials 9.2 (in progress)
      - HR 9.2 (pending)
      - CS 9.2 (pending)
      - Portal (pending)
    - It is very possible, RIC may have more non-upgrade related projects coming up in the coming years.
- About the level of expertise
  - Given this kind of special situations, Rhode Island College is not looking for junior PeopleSoft consultants, because most of the issues can be handled by Rhode Island College’s in house staff. RIC is looking for expert level consultants who can jump in and trouble-shoot some issues so that the college’s business operations will not be negatively affected.
  - RIC’s in house staff are capable of doing many things, including, but not limited to, conversion of Crystal Reports, handling all kinds of customizations, queries, and other tasks during upgrade. However, at the same time, we will have some complicated tasks that are beyond our in house staff’s ability to handle. These tasks will then be assigned to consultants.
  - Some times, RIC has to perform business process review. This is the time we would often need consultants who are specialized in this area to provide professional opinions on how our business processes could be optimized. If the consultants’ proposals are acceptable, the change of business process and the implementation of the new idea will become a new project moving forward.

- About the type of support: remote or onsite
  - Generally, RIC does not mind to receive consulting support remotely. In fact, many trouble-shooting service calls could be done remotely. However, the Committee may consider it not acceptable if the vendor offers remote consultant services only.
  - It is important to understand that RIC may need consultants to provide onsite services, especially when a special project is approved to implement some special feature/modules in PeopleSoft. This kind project usually would involve business analysts who would have to fit-gap analysis and may possibly guide RIC business offices to make adjustment to their business flows. At the same time, technical consultants will be needed to help our admin/dba team to configure systems properly for the new projects.
  - For all vendors, if the rates for remote support and onsite support are different, please list them.
  - It is worth noting that the rates should include “the cost for project team members by position types, travel and any other cost that is part of vendor’s consulting services offering”.

### Vendor Questions with State Responses

#### Vendor A

The RFP mentions bringing PeopleSoft applications “up-to-date” and on p 9, specifies the current releases of PeopleSoft installed @ RIC.

- PeopleSoft Enterprise Interaction Hub (Portal): Currently on 9.1/Tools 8.52;
  - Campus Solutions: Currently on 9.0/Tools 8.53
  - HR: Currently on 9.1/Tools 8.52
  - Financials: Currently on 9.1/Tools 8.52, and we are upgrading it to 9.2/Tools 8.54.
1. Can RIC provide plans, desires to upgrade PeopleSoft 9.2 for HCM and PS Interaction Hub
    - a. **Yes. RIC will discuss the plan with the winning bidder.**
  2. Can RIC provide strategy/requirement to upgrade Campus Solutions upon the release of 9.2
    - a. **Yes. RIC will discuss the plan with the winning bidder.**
  3. Can RIC provide information as to the Financials 9.2 upgrade
    - a. When will the upgrade be complete
      - **As of now, plan to get it done by April 2016. RIC will discuss the plan with the winning bidder.**
    - b. If RIC is using a vendor/SI to do the work, who is the vendor/SI?
      - i. **No. RIC does not have any vendor/SI as of now.**
  3. Does RIC have any interest and/or desires to migrate to Oracle Cloud
    - a. **Yes. This will need to be evaluated at a higher level, depending on the maturity of Oracle Cloud technology and the ROI.**
  4. Could RIC provide a list of initiatives that would be covered under this RFP for the next 18 months?
    - a. **Not yet. RIC projects are funding driven.**

5. How many Vendors will RIC select as part of this RFP
  - a. **The Committee has not met to discuss this yet. As of now, we have no limit, as long as the vendors are meeting the requirements. However, if we have too many vendors meeting the requirements, we may want to trim the list to only award the RFP to top vendors. The purpose is for RIC to maintain a list of qualified vendors to call, in case of emergency. Also, this is our way to prevent some specialty vendors from being excluded.**

#### **Vendor B**

1. Is Rhode Island College willing to entertain Onshore Remote Services for their On-Call PeopleSoft Consulting Services or are you only seeking Onsite Consulting Services?
  - a. **Onshore Remote Services are acceptable. However, the Committee may consider it not acceptable if the vendor can provide Onshore Remote Services only. The vendor should have the ability to provide Onsite services. The rates will have to be clearly defined.**
2. In Section 5: Cost Proposal, are you only seeking the 3 Consultant Service categories? If so, is it alright to provide a price range or are you seeking one flat rate?
  - a. **The cost should be a flat rate. However, it would make sense for a vendor to offer two different prices for each category: one for remote support, and the other for onsite.**

#### **Vendor C**

Please confirm the structure of the response that Rhode Island College is requesting

1. Separate document 1 that addresses the questions/requirements in Section 3, p5 of the RFP
2. Separate document 2 that is supposed to address Technical Proposal – Page 9 [ Total of 6 pages]
3. Separate document 3 – Cost proposal

Regarding the technical proposal section

- a. There does not appear to be any requirements – please explain what RIC is requesting the vendor to respond to
  - **This is strange – the following is the list of requirements – not sure what happened to the document you have received. Please make sure the copy of the RFP you have received have all of the requirements listed (from page 5 to page 8). As far as I can see, we have a long list of requirements listed.**

In Section 4 Technical proposal the following is stated

“The vendor will be evaluated on the project approach, consulting services offered, sustainability of company background, experience, competencies and service delivery and how closely vendor meets requirements listed in Section 3 above.”

We would assume RIC is referring to the following in Section 3

Rhode Island College seeks to engage vendor(s) to provide on-call professional consulting in Oracle/PeopleSoft and its related applications and systems so that Rhode Island College can achieve the following goals:

- Maintain high availability of the college's administrative system;
- Upgrade the college's administrative system on schedule;
- Implement new features for the college's administrative systems on an as-needed basis

Please explain how RIC defines "On-Call" services in relation to an upgrade of a college administrative system

**RIC has its own team of IT professionals who perform many day-to-day operations. At times, RIC needs consultants help in various areas (such as, but not limited to, sudden system crash with no in-house experts to diagnose the issue; general system upgrades hit road-blocks that no in house expertise to resolve the issue in a timely manner; a special project to implement some big modules that we do not have in house expertise/resources to carry it out.....) As you can see, the need for consultants' services could range from small incident support for trouble-shooting to large scale projects. The nature of the services needed could vary significantly, and we are not limited to seek consultant help in upgrade alone.**

Please explain how RIC defines "Implement new features"

**As mentioned earlier, RIC hopes to use consultant services for various future projects. Some of the future projects could very well be to implement new functions/features/modules in PeopleSoft.**

Does RIC desire to upgrade to the latest release of PeopleSoft 9.2 or is RIC desiring upgrade/implementation of new features for feature packs released frequently by Oracle.

**It is RIC's goal to keep its systems up-to-date. All upgrades/fixes & patches will need to be current.**

Would RIC entertain a global delivery model utilizing technical resources offshore to reduce the overall cost?

**Offshore support is not acceptable.**

#### **Vendor D**

Are you looking for a vendor who specializes in remote managed PeopleSoft services to do support based upon Service Level Agreements and be able to access consultants at any time 24/7? Or are you looking for a PS Vendor that can provide onsite PS Consultants from a staff augmentation perspective for specific projects.

**Remote service support is acceptable. However, offshore support is not acceptable. . If a vendor offers both onsite and onshore remote service supports, please list two rates separately.**

## Vendor E

1. Is it a fair assumption that Vendor team will be responsible for the following three activities -
  - a) High availability of PeopleSoft infrastructure – Windows server, SqlServer DB, Weblogic application/web servers in the line of managed services.
  - b) Applying mandatory patches on an on-going basis at os, db, PeopleSoft servers to keep it current
  - c) As-needed support on the functional / development side for all 4 applications – Campus, Finance, HCM and Interaction Hub.
    - **In fact, RIC does not mind to select multiple vendors for different services – it is very likely that RIC may select some vendors that are specialized in supporting Windows/SQL platforms and some other vendors that are specialized in PeopleSoft. Even within PeopleSoft, it is possible some vendors are selected because they are specialized only in one of the systems (CS, HR, Fin, or Portal). We want to select the best vendors. If a vendor that has expertise in all of these areas, the Committee will love to see that as well.**
2. Expectation is to have the vendor staff remote, correct? Would they be expected to travel on-site at any point, for meetings or discussions? Can offshore resources be part of Vendor remote staff team?

**Remote service support is acceptable. However, offshore support is not acceptable. If a vendor offers both onsite and onshore remote service supports, please list two rates separately.**

3. Would remote access to development / production support system be provided?

**Yes.**

4. Since its as-needed based professional services requirement, vendor staff would not be assigned full-time / dedicated to Rhode Island College. Is it okay to have vendor staff involve different staff at different points of time based on need and load? Is the college willing to provide remote access to a pool of vendor staff knowing it will not be the same person all the time?

**That would be fine. However, it would be ideal for the vendor to assign the same person to one project, although a project could be very small in scope in some cases, while sometimes it could be huge. It would be ideal to limit the size of the “rotation pool” because it is not efficient for RIC to explain the system environment to the “new” consultant every time you make an assignment change.**

5. Is there a ticketing system where all issues are recorded?

**Consultants will NOT be called for small incidents. These will be taken care of by in house staff. Consultants will be called in for special situations when in house staff got stuck (for serious trouble-shooting), or sudden/unplanned/new/major projects.**

6. What the ball park number of support tickets and enhancement tickets for various PeopleSoft product lines – Financials, Campus, HCM, Interaction Hub and PeopleSoft Administration. This will give us an idea on how many vendor staff (or bucket of hours) would we have to make available for the college, even if it's on part-time basis.

**Depending on the situation/projects, usually, we would need one technical consultant (who can trouble shoot PeopleTool and system related issues), one business consultant (who knows the system modules and business processes).**

7. Would Rhode Island College need a dedicated project manager from the vendor side?

**Yes, if the project is big.**

8. Would you be able to give us an idea on what level of support is expected from vendor staff on the application side? Would the calls/tickets be like 'process monitor shows the process failed' type of first level support or 'build a new BI publisher report' type of L3 development/enhancement support.

**RIC's in house staff are capable of doing many things – they have been able to implement many features and have completed many of the upgrades without significant consultant help. We are talking about "expert" level support. None of the calls to the consultant will be low level incidents.**

9. What is the current size of database and what is the estimated growth

**Portal -6 GB / CS -130 GB / Financials - 50 GB / HR - 35 GB**

**5% growth annually.**

10. What is the level of customization on the modules used in production? Are there documents for vendor team (or walkthrough sessions) to understand the customization so we can support / develop without affecting the customizations?

**RIC has some (but not significant amounts) of customizations. We do have documentations for consultants.**

11. Please share the approximate number of business processes for which PeopleSoft workflow is in use.

**One in HR, and one in Financials.**

Vendor F

1. Do you have a comprehensive list of Interfaces with interface specifications because tables changed in v9.2 and retrofitting could take additional time and resources?

**Yes, RIC has all the information about interface. Details will be made available to consultants if needed.**

3. How many Crystal reports need to be converted to BI Publisher? May need to create App Engine programs to feed the data

**No more 10. RIC In house staff are converting them now. Consultant services will be used only for complicated ones.**

4. What is the scope for upgrading Queries both Public & Private. Will there be any cleanup effort?

**Most of the queries are not an issue for RIC, and we may not need consultant services in this area.**

5. Retrofit Customizations – Do you have complete Documentation?

**Most of the customizations are not an issue for RIC, and we may not need consultant services in this area**

6. Did you customize delivered objects?

**Sometimes. Most of the customizations are not an issue for RIC, and we may not need consultant services in this area**

7. Are custom SQL scripts in a separate directory?

**Yes.**

8. Do you have documented standards?

**Yes.**

9. Is nVison reporting in scope?

**Yes. However, this area might not need consultant services.**

10. Are you planning to use WorkCenters?

If so, have they been scoped and are you planning to create any custom Work Alert?

**No. This could be one of the areas that a consultant may give us an insight/guidance, or to help us to get it implemented.**

11. Planning on implementing DashBoards?

**Possible. This could be one of the areas that a consultant may give us an insight/guidance, or to help us to get it implemented.**

12. Issues with your current environment that you expect to be corrected with v9.2 ?

**Nothing serious.**

13. Is there any Chartfield re-design anticipated?

**Nothing yet.**

14. Any changes to KK summarizations or ledgers anticipated?

**There is a possible KK change which depends on the accounting needs.**

15. What is the makeup of your team?

**Two Teams: Application Development Team & DBA Team. The App Team has 7 programmers (including a manager), covers CS, HR, and Financials. The DBA Team has 3 system admins (including a manager) covers all PS modules and the Portal, along with a lower level tech supporting help desk. The DBA team is responsible for all in house upgrades. This is the team may need consultant the most.**

16. What is your ideal project mix for consultants to Full Time employees?

**Probably we need a technical consultant at first (for helping upgrading to 9.2 Financials). In the future, we may need to add a business consultant for implement other/new features in PeopleSoft. If, in case we have a huge project, we may need a project manager.**

### **Vendor G**

1. Would Rhode Island College require the solution to include an issue tracking system, or would we utilize the College's tracking system?

**There is no need for a tracking system because the RFP is more about getting an expert level consultant support. We are not talking about lower level PeopleSoft issues. If we call a vendor asking for support, the issue must be very serious that our in house senior IT staff could not handle.**

## Vendor H

- Term of contract – should Ciber anticipate one year as noted in the linked contract?
  - **As indicated in RFP/contract.**
  
  - What is the anticipated contract start date?
  - **When the Committee finalizes the selection of vendors.**
  
  - What are the initial projects or consulting efforts RIC expects to address? This will help us with resource planning
  - **As indicated in RFP/contract.**
  
  - Does RIC anticipate contracting with multiple vendors? If so, does RIC anticipate inviting all vendors to compete for each project or consulting effort?
  - **Committee will decide the number of vendors to be selected. For all selected vendors, if multiple vendors are qualified for a certain project, competing proposals will then be needed and evaluated by the Committee which will in turn select the best proposal.**
  
  - Page 9 is titled, “Section 4: Technical Proposal” and notes that we need to respond to particular questions, but the content on Page 9 appears to discuss RIC’s technical environment rather than pose any questions. Should “Section 4: Technical Proposal” appear at the top of Page 7 instead?
  - **This is just a format of the RFP.**
  
  - Page 6 states, “Vendor should have 24/7/365 support and all calls should be responded to within 4 hours or less.” Our consultants typically work for their client for 40-hours per week on a four-day schedule, and are responsive and available to their client during that time. (Alternate schedules may be negotiated.) In addition, we offer hosting and managed services contracts that include response times as part of a negotiated Service Level Agreement. Is RIC interested in such a contract?
  - **Vendors are encouraged to submit their service proposals as they see fit. The Committee will review that and make decisions accordingly.**
  
  - Is RIC open to consultants working remotely or is onsite presence expected?
- **Remote support is acceptable. However, offshore support is not acceptable.**

## Vendor I

1. Would RIC be willing to utilize remote and/or offshore resources? Rates would vary and would be listed in the Cost Proposal Section.

**Remote support is acceptable. However, offshore support is not acceptable. . If a vendor offers both onsite and onshore remote service supports, please list two rates separately.**

2. How much (what percentage) of the work could be performed remotely verse on---site?

- **It really depends on the situation/project.**

3. Would RIC consider using our lab for the technical upgrade or would RIC prefer on-site consultants to perform the entire (technical and functional) upgrade?

- **RIC has never done any upgrade through a lab. We could explore this option. However, for now, it is more about the service support for in house upgrade.**

## **Vendor J**

### **TECHNOLOGY RELATED QUERIES:**

The RFP mentions bringing PeopleSoft applications “up-to-date” and on p 9, specifies the current releases of PeopleSoft installed @ RIC.

☑ PeopleSoft Enterprise Interaction Hub (Portal): Currently on 9.1/Tools 8.52;

☑ Campus Solutions: Currently on 9.0/Tools 8.53

☑ HR: Currently on 9.1/Tools 8.52

☑ Financials: Currently on 9.1/Tools 8.52, and we are upgrading it to 9.2/Tools 8.54.

1) Can RIC provide plans, desires to upgrade PeopleSoft 9.2 for HCM and PS Interaction Hub?

**Yes**

2) Can RIC provide strategy/requirement to upgrade Campus Solutions upon the release of 9.2?

**Yes**

3) Can RIC provide information as to the Financials 9.2 upgrade

a. When will the upgrade be complete?

**It is currently planned for April 2016.**

b. If RIC is using a vendor/SI to do the work, who is the vendor/SI?

**No. RIC does not have any vendor/SI.**

4) Does RIC have any interest and/or desires to migrate to Oracle Cloud?

- a. **Yes. This will need to be evaluated at a higher level, depending on the maturity of Oracle Cloud technology and the ROI.**

### **OTHER QUERIES:**

5) Could RIC provide a list of initiatives that would be covered under this RFP for the next 18 months?

**Nothing concrete yet, except that RIC is currently working on 9.2 Financials upgrade, and all other systems (CS, HR, and Portal) will need to be upgraded soon as well. At the same time, there might be several other projects moving forward.**

6) How many Vendors will RIC select as part of this RFP?

**The Committee will decide that soon.**

7) Can we assume that RIC is looking for a two-tier team – (i) a 24x7 Support team who will provide on-call technical support for any queries regarding the Peoplesoft/Oracle products and tools and help the resolve end user issues and (ii) a back-bone technical team to provide fixes and code changes for bugs/incidents and carry out upgrades and enhancements?

**Not quite. RIC is looking for a vendor to provide 24x7 support -- only in case of emergency of a critical failure of PeopleSoft system. Normally, we can handle the issues in house. However, the consulting service we are looking for might be used for some future project support.**

8) Can RIC elaborate the scope and expectations of the on-call technical support team?  
a. nature of issues that would be expected to be handled by this team

**Occasionally, RIC's PeopleSoft system goes down for some unexpected reasons, which might tie to the load balancer, firewall, or PeopleSoft settings. RIC is looking for a vendor to provide 24x7 support -- only in case of emergency of a critical failure of PeopleSoft system.**

b. Past volumes trends for on-call support, if available

**RIC had one critical failure of PeopleSoft system a few years ago on the eve of first day of school, and we had a consultant solved the problem for us overnight.**

c. SLA expectations

**RIC expect the consultant to respond RIC's request immediately, if this kind of critical situation happens.**

d. Is there a ticketing system used for on-call support? If so, please share the details.

**Since the situation when we need a consultant must be very serious – RIC will handle most issues in house – we will not use a ticketing system.**

9) The PDF document mentions that one of the goals that RIC is looking for is “upgrade of the administrative system on schedule” – Can you please share the details of the envisioned upgrades and timelines?

**RIC is working on 9.2 Financials upgrade right now. RIC will continue to upgrade the rest of the systems (CS, HR, Portal to 9.2).**

10) What is the current state of the Production Deployment landscape / architecture? Are there any performance / monitoring tools used in the current production system?

**RIC has two tiers: development environment, test environment and production environment. They all have independent DB, app server, and Web servers. Production environment is behind the load balancer. For performance tuning, we have following tools:**

- **MS SQL Server Profiler.**
- **MS SQL Server Database Tuning Advisor.**
- **The standard PeopleSoft tracing and performance monitoring utilities.**
- **DBArtisan.**

### **Vendor K**

Will Remote Service Delivery Methods be considered?

**Remote support is acceptable. However, offshore support is not acceptable. If a vendor offers both onsite and onshore remote service supports, please list two rates separately.**

Will multiple vendors be contacted for on demand service requests?

**The Committee may select multiple vendors as they see fit.**

How many hours a week are you expecting the vendor to have resources available to address your needs?

**For trouble shooting, not that much (for any given month), if there is no projects at hand. However, if there are projects, then, the number of hours will be determined by the scope of projects.**