



**Solicitation Information
April 6, 2016**

RFP #7550489

TITLE: On-Call Peoplesoft Consulting Services – University of Rhode Island

Submission Deadline: Thursday, May 5, 2016 at 2:00 PM (ET)

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Monday, April 18, 2016 at 5:00 PM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

GAIL WALSH
CHIEF BUYER

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed four-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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SECTION 1 –INTRODUCTION

The Rhode Island Department of Administration, Division of Purchases, on behalf of the University of Rhode Island (URI) is soliciting proposals from qualified firms to assist the University's Information Technology Services department. The professional consulting services URI is seeking are both functional and technical as described herein, and in accordance with the terms of the Request and the State's General Conditions of Purchase (available at www.purchasing.ri.gov). As such, URI at its sole discretion may choose one or more firms to fulfill this assignment. The initial contract period will be three (3) years with an option to renew for one (1) year from the date of final contract signing.

This is a Request for Proposal (RFP), not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Office of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

1. Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.
4. Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

6. Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the official time clock is located in the reception area of the Division of Purchases.
7. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontractors are permitted, provided that their use is clearly indicated in the vendor's proposal and the subcontractor(s) to be used is identified in the proposal.
8. All proposals shall include the Respondent's FEIN or Tax Identification number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.
9. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
10. Vendors are advised that all materials submitted to the Division of Purchases for consideration in response to this RFP will be considered to be Public Records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request once an award has been made.
11. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
12. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation.
13. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).
14. The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information visit the website www.mbe.ri.gov

SECTION 2: BACKGROUND AND PURPOSE

University of Rhode Island is a public institution that was founded in 1892. It has a total undergraduate enrollment of 13,589, and 3,000 graduate students its setting is rural, and the main campus size is 1,245 acres. URI is small enough to be friendly, intimate, safe, and student centered. Our students come from most states in the U.S. and dozens of countries all over the world. It utilizes a semester-based academic calendar. More than 100 undergraduate and 80 graduate degree programs, plus more than 100 student clubs and activities spark creativity and inspire our students' pioneering spirit. Perfectly located six miles from Rhodes Island's coastal beaches and easy driving distances from Providence, Boston, and New York, our picturesque rural setting is close enough to big-city culture to make anyone feel at home.

The main campus of the University of Rhode Island is located in the village of Kingston, with three smaller campuses in various parts of the state. The university began as an agricultural school, and a renovated farmhouse has stood on the Kingston campus for more than a century. Now, URI offers more than 80 undergraduate majors and many master's programs as well, including those in the School of Education, the [College of Business Administration](#) and [College of Engineering](#).

SECTION 3: SCOPE OF WORK

General Scope of Work

Note: The term “vendor”, “offeror” and “bidder” refer to the company responding to this RFP.

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

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

Vendor(s) Requirements

Vendor(s) need to meet the following requirements:

Vendor should have extensive experience in the aspects and functionality of the Oracle/PeopleSoft Enterprise systems and the related products, including, but not limited to, the implementation and upgrade of the following:

- Up-to-date Red Hat Linux operating systems on which PeopleSoft systems run
- Up-to-date Oracle database in which PeopleSoft system reside
- Up-to-date BEA/Weblogic servers under which PeopleSoft systems operate
- Up-to-date various PeopleSoft products
- Up-to-date PeopleTools
- Up-to-date global and local traffic management/load balancing for Peoplesoft systems
- Vendor should provide subject matter expertise in the aspects and functionality of the Oracle/PeopleSoft Enterprise systems and the related products, including, but not limited to the following:
 1. Red Hat Linux operating systems on which PeopleSoft systems run
 2. Oracle database in which PeopleSoft system reside
 3. BEA/Weblogic servers under which PeopleSoft systems operate
 4. COBOL compiler, with which some of the core PeopleSoft programs were written
 5. Crystal Reports, from which many current PeopleSoft reports need to be converted
- Oracle/PeopleSoft Enterprise systems, including potential issues related to the security and integrations of 3rd party software

Vendor(s) should meet the following additional requirements:

- Vendor should have business professionals who have in-depth knowledge of business operations in higher education that are supported by the Oracle/PeopleSoft and its related systems
- Vendor should provide technical experts who can trouble-shoot technical issues in the Oracle/PeopleSoft and its related systems
- Vendor should have professionals who can conduct Fit-Gap analysis and develop specifications for new projects.
- Vendor should have 24/7/365 support and all calls should be responded to within approximately 4 hours or less
- Vendor should provide detailed documentation (new code, changes, instructions, etc.) for all professional services performed for University of Rhode Island
- Vendor should be able to provide PeopleSoft development services on an as-needed basis including, but not limited to reports (e.g. Crystal to BI Publisher conversion), enabling or adding new business/technical functionality (e.g. mobile app), and training
- Vendor should be able and willing to liaise and work with current staff for knowledge transfer and handover

- Vendor should work with/communicate with staff to facilitate support/resolve issues
- Vendor should attend meetings when requested/needed by staff
- Vendor should work with other consultants/vendors when needed to resolve issues
- URI reserves the right to review and approve any consultant prior to work
- Final payment will be conditional on a complete set of documentation being provided that covers the work completed during the engagement

Company Background

Provide the following:

- Please give a short history of your company (please also indicate your growth/merger history and plans) to demonstrate your experience in providing professional consulting services to other schools.
- Does your company utilize sub-contractors? If so, list them and describe the role each will play in providing services under this contract.
- Please provide sufficient information to demonstrate the financial security and stability of your company.
- Describe your company's position and participation in the industry as a whole. For example, of what organizations are you a member? How do you help to educate your customers on regulations and other issues within the industry?
- Describe your relationship (the level of partnerships) with other software vendors (including Oracle/PeopleSoft)

Company Experience

Vendors should describe the company's experience in providing similar services in the past, including:

- List number of employees and sub-contractors, broken down by Higher Education and non-Higher Education Environment
- List number of engagements by year, broken down by Higher Education and non-Higher Education Environment
- Supply three (3) references with contact information for your most recent engagements; (It is preferred that two of these three be higher education references)
- List details of contracts/engagements with Higher Education institutions, noting any similarities to URI environment and/or this proposed contract
- Provide resumes on the person or persons who will potentially serve as primary contact with URI if your company is awarded this proposed contract

Experience/Competencies

Vendor(s) should describe their experience/competencies within the following areas:

- PeopleSoft Technical Consulting Experience with the PeopleSoft Enterprise Systems, including, but not limited to:
 - Implementation of modules.
 - Upgrading versions, including tool versions.
 - Various modules, including, but not limited to PeopleSoft portal, AWE (Approval Workflow Engine) framework/EOAW (Enterprise Objects Approval Workflow) and some other major PeopleSoft components.
 - Various platforms and application components, including, but not limited to Oracle Database, BEA Weblogic, Integration Broker, Load Balancer, and mobile apps.
 - Various integration services, including, but not limited to Web and REST Services to integrate with 3rd party external systems, especially for SSO (Single Sign-On).

Vendor(s) should also demonstrate that the consultants who may be assigned to URI meet the following criteria:

- At least 10 years of experience in providing relevant consulting services to higher education clients (for details, please see the sub-category listed in Section 7).

Service Delivery Method/Approach to Engagements

Vendor(s) should explain their approach to engagements, including the approach to provide the following services:

- System and program analysis and design, including Fit-Gap analysis.
- Software development (upgrades, development, customizations, interfaces & bolt-on's)
- Troubleshooting
- Testing
- Training
- Functional consulting, including assessments and recommendations
- Data cleanup
- Task management and status updates
- Implementation of delivered software and functionality, including upgrades
- Archiving

SECTION 4 – TECHNICAL PROPOSAL

Narrative and format: The separate technical proposal should address specifically each of the required elements:

Technical Background

The hardware platform for the Oracle/PeopleSoft ERP System at URI consists of a group of VMWare servers running on physical IBM Servers with IBM Storage. The operating system is Windows 2003 (with imminent plans for upgrade). All of the PeopleSoft systems at URI PeopleSoft are running on Microsoft SQL 2012. URI does not have any Oracle databases.

URI has implemented the following PeopleSoft products:

- PeopleSoft Enterprise Interaction Hub (Portal): Currently on 9.1/Tools 8.52;
- Campus Solutions: Currently on 9.0/Tools 8.53 upgrading to 9.2/tools 8.54
- HR: Currently on 9.2/Tools 8.52
- Financials: Currently on 9.1/Tools 8.52, and we are upgrading it to 9.2/Tools 8.54.

URI currently owns the following modules/components:, MicroFocus (for Cobol), Grants/grants Portal, Time And Labor, Budgets, Purchasing, Financial Aid, Project Costing, Learner Services, Asset Management, Benefits Admin, Student Records, Student Billing, Student Financials, Academic Advisement, Payroll, Payroll Encumbrances, Human Resources, Accounts Payable, Campus Community, Admissions, General Ledger, Encumbrances, Inventory, Enterprise eProcurement, eSupplier, eSettlement, Enterprise Procurement Mart, Erecruit, Eprofile, Ebenefits, Edevelopment, Epay, Ecompensation, Outreach, Faculty Management, Personal Portfolio, Involvement, Accts Receivable/Billing. All PeopleSoft Web services are running on BEA/Weblogic servers.

There are several 3rd party software systems currently integrated with PeopleSoft (including, but not limited to, CashNet/HigherOne (Cashing, eBilling), Sakai, Adastra, Google Apps for Education, Cayuse etc..

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.

SECTION 5: COST PROPOSAL

A separate, signed and sealed, Cost Proposal reflecting the fee structure proposed for this scope of services.

Consultant Service	
Project Manager	\$ (Hourly Rate)
Technical Expert Consulting Services	\$ (Hourly Rate)
Oracle Database Consulting Services	\$ (Hourly Rate)
Business Expert Consulting Services	\$ (Hourly Rate)

The price will be evaluated along with the above items as a factor in selection. **Price response should include hourly rate for project team members by position types, travel and any other cost that is part of vendor’s consulting services offering.**

It is important to note that URI defines “Expert Consulting Services” as those who have at least 10 years of experience in providing relevant consulting services to higher education clients (for details, please see the sub-category listed in Section 7).

SECTION 6: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 50 out of a maximum of 70 technical points. Any technical proposals scoring less than 50 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 50 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

URI reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

NOTE – As part of the award process, any Bidder meeting minimum Technical Evaluation points may **required** to conduct an in-person, on campus web presentation. The Technical Evaluation Committee will complete a final Technical Evaluation after viewing in-person, on-campus presentations, if needed.

The responses to the RFP will be evaluated using the following criteria including but not limited to:

- Vendor experience and reliability
- Years providing similar services to Higher Education clientele
- Project team members experience
- Knowledge of Higher Education business processes with relation to Oracle/Peoplesoft solutions
- Knowledge of Oracle/PeopleSoft and its related products
- Experience integrating Oracle/Peoplesoft with third-party software systems (on-premise and SaaS)
- Experience providing new feature and upgrade services to Oracle/Peoplesoft Higher Education clientele
- Detailed response to questions
- Support process and structure

Since URI is looking for expertise in a wide-range of fields, vendor(s) are allowed to bid on only the sub-categories in which they specialize:

- 1) PeopleSoft Human Resources (HR)
- 2) PeopleSoft Campus Solutions (CS)
- 3) PeopleSoft Financials (Fin)
- 4) PeopleSoft Interactive Hub (Portal Technology)
- 5) PeopleSoft Technologies (including, but not limited to, PeopleTools, BEA/WebLogic, and all PeopleSoft related technologies such as Integration Broker, SQR, SQL, Etc)
- 6) PeopleSoft Underlying Technologies (including, but not limited to, Windows server administration Linux server administration, Network technology, Load Balancing, LDAP, Active Directory etc.)
- 7) Oracle database in which PeopleSoft system resides

Vendors are allowed to bid all or any of the above seven (7) categories. For each sub category, the bidding vendors will have to demonstrate their specialty expertise with supporting descriptions and the project team member.

All proposals will be reviewed and scored based upon the following criteria, and each specialty will be scored separately.

Criteria	Possible Points
Company background and experience	20 points
Higher Education Experience	20 Points
Specialty Expertise Coverage\Project Team member experience	30 Points
Total Possible Technical Points	70 Points
Cost calculated as lowest responsive cost proposal divided by (this cost proposal) times 30 points *	30 Points
Total Possible Cost Points	30 Points
Total Possible Points	100 Points

*The Low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

(low bid / vendors bid) * available points

For example: If the low bidder (Vendor A) bids hourly rate of \$100 and Vendor B bids hourly rate of \$200 for the hourly rate and the total points available are thirty (30), vendor B's cost points are calculated as follows:

$\$100 / \$200 * 30 = 15$ Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal. Applicants may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in their proposal.

SECTION 7: PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. Please reference **RFP # 7550489** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 222-3766 or lynda.moore@doit.ri.gov.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties will be permitted.** Interested offerors may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases will not be considered.

Responses (**an original plus six (6) copies**) should be mailed or hand-delivered in a sealed envelope marked “**RFP# 7550489 On-Call Peoplesoft Consulting Services**” to:

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses shall include the following:

1. A completed and signed four-page R.I.V.I.P generated bidder certification cover sheet downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
2. A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.

3. **A separate Technical Proposal** describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The Technical Proposal is limited to six (6) pages (this excludes any appendices) . As appropriate, resumes of key staff that will provide services covered by this request.
4. **A separate, signed and sealed Cost Proposal** reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.
5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in **electronic format (CD-Rom, disc, or flash drive)**. Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked “original”.

SECTION 8: CONCLUDING STATEMENTS

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The State’s General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded to the RFP. The State’s General Conditions of Purchases/General Terms and Conditions can be found at the following URL: <https://www.purchasing.ri.gov/RIVIP/publicdocuments/ATTA.pdf>