Solicitation Information
January 15, 2020

RFP# 7599932

TITLE: On-Call Peoplesoft Consulting Services – Rhode Island College

Submission Deadline: February 13, 2020 @ 11:00 AM (Eastern Time)

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<tr>
<th>PRE-BID/ PROPOSAL CONFERENCE:</th>
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<td>MANDATORY:</td>
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<td>If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents. A vendor’s failure to attend and register at the mandatory Pre-Bid/ Proposal Conference shall result in disqualification of the vendor’s bid proposals as non-responsive to the solicitation.</td>
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Questions, if any, will be posted on the Division of Purchases’ website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED: No

PAYMENT AND PERFORMANCE BOND REQUIRED: No

Gary P. Mosca, Chief Buyer

Note to Applicants:
1. Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov
2. Proposals received without a completed RIVIP Bidder Certification Cover Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION COVER FORM
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SECTION 1. INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Rhode Island College (“RIC”), is soliciting proposals from qualified firms to provide assistance to the college’s Information Technology Services division. The professional services Rhode Island College is seeking are both functional and technical as described herein, and in accordance with the terms of this Request for Proposals (“RFP”) and the State’s General Conditions of Purchase, which may be obtained at the Division of Purchases’ website at www.purchasing.ri.gov.

The initial contract period will begin approximately March 1, 2020 – February 28, 2023 (3 year contract) with an option to renew for one (1) year based on vendor performance and the availability of funds.

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this solicitation, 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 RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.

3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content, shall be borne by the vendor. The State assumes no responsibility for these costs even if the RFP is cancelled or continued.

4. Proposals are considered to be irrevocable for a period of not less than 180 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 in the proposal.

6. 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. Subcontracts 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.

7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.
8. Vendors are advised that all materials submitted to the Division of Purchases for consideration in response to this RFP may be considered to be public records as defined in R. I. Gen. Laws § 38-2-1, et seq. and may be released for inspection upon request once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the Division of Purchases may release records marked confidential by a vendor upon a public records request if the State determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature.

9. 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.

10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than $10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an “Affirmative Action Policy Statement.”

Vendors with 50 or more employees and $50,000 or more in government contracts must prepare a written “Affirmative Action Plan” prior to issuance of a purchase order.

a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.

For further information, contact Vilma Peguero at the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at ODEO.EOO@doa.ri.gov.

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).

12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”) (collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at http://odeo.ri.gov/offices/mbeco/mbe-wbe.php. Information regarding DisBEs may be accessed at www.gcd.ri.gov.

For further information, visit the Office of Diversity, Equity & Opportunity’s website, at http://odeo.ri.gov/ and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1. The Office of Diversity, Equity & Opportunity may be contacted at, (401) 574-8670 or via email Dorinda.Keene@doa.ri.gov

13. HIPAA - Under HIPAA, a “business associate” is a person or entity, other than a member of the workforce of a HIPAA covered entity, who performs functions or activities on behalf of, or provides certain services to, a HIPAA covered entity that involves access by the business associate to HIPAA protected health information. A “business associate” also is a subcontractor that creates, receives, maintains, or transmits HIPAA protected health information on behalf of another business associate. The HIPAA rules generally require that HIPAA covered entities and business associates enter into contracts with their business associates to ensure that the business associates will appropriately safeguard HIPAA protected health information. Therefore, if a Contractor qualifies as a business associate, it will be required to sign a HIPAA business associate agreement.
14. Eligible Entity - In order to perform the contemplated services related to the Rhode Island Health Benefits Exchange (HealthSourceRI), the vendor hereby certifies that it is an “eligible entity,” as defined by 45 C.F.R. § 155.110, in order to carry out one or more of the responsibilities of a health insurance exchange. The vendor agrees to indemnify and hold the State of Rhode Island harmless for all expenses that are deemed to be unallowable by the Federal government because it is determined that the vendor is not an “eligible entity,” as defined by 45 C.F.R. § 155.110.

15. Bid Surety Bond – Vendors responding to this RFP must furnish, with their bid proposals, either a bid bond from a surety licensed to conduct business in the State of Rhode Island or a certified check payable to the State of Rhode Island in the amount of five (5%) percent of the vendor’s cost proposal. (Vendors for Rhode Island Department of Transportation highway and bridge projects must furnish, with their bid proposals, a bid bond from a surety licensed to conduct business in the State of Rhode Island. Certified checks are not permitted for these projects.) An attorney-in-fact who executes a bond on behalf of the surety must provide a certified current copy of the power of attorney. A successful vendor who fails to submit the additional documentation required by the tentative letter of award and/or fails to commence and pursue the work in accordance with the contract awarded pursuant to this solicitation may forfeit, at the discretion of the State Purchasing Agent, the full amount of the bid surety as liquidated damages. The State will retain the bid surety of all vendors until the earliest of: (i) the issuance of the Purchase Order; (ii) the 61st day following the proposal submission deadline; or (iii) the rejection of all proposals.

16. Payment and Performance Bond - The successful vendor must furnish a 100% payment and performance bond from a surety licensed to conduct business in the State of Rhode Island upon the tentative award of the contract pursuant to this solicitation.

17. Master Price Agreements - Contract Administrative Fee - In 2017 the General Assembly amended the “State Purchases Act”, R. I. Gen. Laws § 37-2-12 (b) to authorize the Chief Purchasing Officer to establish, charge and collect from vendors listed on master price agreements (“MPA”) a contract administrative fee not to exceed one percent (1%) of the total value of the annual spend against their MPA contracts. All contract administrative fees collected from MPA vendors shall be deposited into a restricted receipt account which shall be used for the purposes of implementing and maintaining an online eProcurement system and other costs related to State procurement. In accordance with this legislative initiative the Division of Purchases is upgrading the State procurement system through the purchase and installation of an eProcurement system. The contract administrative fee shall be applicable to all purchase orders issued relative to State MPA contracts. Therefore, effective January 1, 2020 all MPA contracts shall be assessed the 1% contract administrative fee.

SECTION 2. BACKGROUND
Rhode Island College is located on a 180-acre campus in the Mount Pleasant section of Providence. Academic offerings are provided in six schools: the Faculty of Arts and Sciences, the Feinstein School of Education and Human Development, the School of Social Work, the School of Nursing, the School of Business and the School of Graduate Studies, as well as the Center for Management and Technology and the Office of Continuing Education and Summer Sessions.

Established in 1854, Rhode Island College now serves approximately 7,200 Undergraduate students and 1,800 Graduate students in courses and programs both on and off campus.

The oldest of the three public institutions of higher education that operate under the aegis of the Board of Governors for Higher Education, the College is supported by the State of Rhode Island as its only comprehensive college, and is part of the system of public higher education which includes the Community College and the University. Rhode Island College is nonsectarian and coeducational. Over 80 offices and departments are housed on the campus, and about 375 fulltime faculty members contribute to the College’s mission to make its academic programs available to any qualified resident of Rhode Island who can benefit from its educational services.

Rhode Island College has its own professional staff team handling day-to-day PeopleSoft user needs. RIC’s need for “On-Call” Consultant Services are to assist with true emergency system production issues when no in house expertise is available to troubleshoot the issue right away. Assist with general projects for new features/functions/module implementations and general trouble-shooting when in house staff encounter roadblocks and require assistance. See comment.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

General Scope of Work

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

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

Vendor Requirements

Vendors need to meet the following requirements:
Vendor should have extensive experience in all 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 Microsoft Windows operating systems on which PeopleSoft systems run
- Up-to-date Microsoft SQL database in which PeopleSoft system reside
- Up-to-date Tuxedo/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 for all aspects and functionality of the Oracle/PeopleSoft Enterprise systems and the related products, including, but not limited to the following:

  1. Microsoft Windows operating systems on which PeopleSoft systems run
  2. Microsoft SQL database in which PeopleSoft system reside (especially the AlwaysOn feature for Microsoft SQL 2017)
  3. Tuxedo/Weblogic servers under which PeopleSoft systems operate
  4. COBOL compiler, with which some of the core PeopleSoft programs were written
  5. Elastic Search
  6. Integration Broker

- All aspects and functionality of the Oracle/PeopleSoft Enterprise systems, including potential issues related to the security and integrations of 3rd party software

Vendor 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 4 hours or less
- Vendor should provide detailed documentation (new code, changes, instructions, etc.) for all professional services performed for Rhode Island College
- Vendor should be able to provide PeopleSoft development services on an as-needed basis including, but not limited to reports, 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
- Rhode Island College 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)

**Company Experience**

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

- List number of fulltime employees and sub-contractors, broken down by Higher Education and non-Higher Education Environment
  - It is very important to indicate if your company always hire sub-contractors for clients’ projects.
- 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 Rhode Island College environment and/or this proposed contract
- Provide detailed information on the person or persons who will potentially serve as primary contact with Rhode Island College if your company is awarded this proposed contract
Experience/Competencies

Vendors should describe their experience/competencies within the following areas:

PeopleSoft Functional Consulting Experience with the PeopleSoft Enterprise Systems, including, but not limited to PeopleSoft enterprise modules such as HR, Campus Solutions, and Financials;

- PeopleSoft Technical Consulting Experience with the PeopleSoft Enterprise Systems, including, but not limited to:
  - 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 MS SQL Database, Tuxedo/Weblogic, Integration Broker, Elastic Search, Load Balancer, and mobile app.
  - Cloud experience, including, but not limited to, Lift & Shift or upgrade to Oracle Cloud, Microsoft Azure or AWS, etc.
  - Branding using Interaction Hub;
  - Enabling using Fluid features;
  - Possible migrating on premise PeopleSoft systems to Cloud;
  - 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).
  - Experience creating data integrations with other enterprise systems or functional systems intended to enhance or build upon ERP technology (i.e. Salesforce)

Vendor should also demonstrate that the consultants who may be assigned to Rhode Island College 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

Vendors 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 etc.) using both waterfall and agile methodologies
• Troubleshooting
• Testing
• Training
• Functional consulting, including assessments and recommendations
• Data cleanup
• Task management and status updates
• Implementation of delivered software and functionality, including upgrades

Clarifications

• About the specialty subject areas
  • Although this RFP is mainly for “PeopleSoft”, it does not mean that we are only looking for “PeopleSoft consultants”. As indicated in the document, RIC will need different type of experts in different areas:
    1. PeopleSoft Human Resources (HR)
    2. PeopleSoft Campus Solutions (CS)
    3. PeopleSoft Financials (Fin)
    4. PeopleSoft Interaction Hub (Portal Technology)
    5. PeopleSoft Technologies (including, but not limited to, PeopleTools, Tuxedo/WebLogic, and all PeopleSoft related technologies)
    6. PeopleSoft Underlying Technologies (including, but not limited to, Microsoft SQL Database, Windows server administration, Network technology, Load Balancing, Active Directory/LDAP, LTM, network security, 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 (consultants) 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.

• About the term “On-Call”
  • Although we are looking for “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 is mainly for many important tasks. The following are examples of such tasks that needed consulting 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 our consultants 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//Ongoing Support

- 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, we are in the process of upgrading PeopleSoft 9.2, and there might not be major projects on the horizon. The following is the status of the upgrade status:
  - Interaction Hub Portal 9.1, Applying PeopleTools 8.57
    - Planned Go Live: November 2019
  - Financials 9.2, applying PeopleTools 9.57
    - Planned Go Live: Early 2020
  - HR 9.2, patching PeopleTools, 8.56.13
    - Planned Go Live: Early 2020
  - CS 9.0 Upgrading to 9.2 with PeopleTools 8.57
• Planned Go Live: January 2020
• We will need ongoing support for the following:
  o Apply PUM/Bundle/Security Fix releases for Campus Solutions, HR, Financials, and Interaction Hub on a regular basis;
  o Apply 1099, W2, and many other special functional required updates on regular basis;
  o Apply annual PeopleTools releases and upgrades for Campus Solutions, HR, Financials, Interaction Hub, Integration Broker and Elastic Search engine on a regular basis;
  o Upgrade SQL Database Engine for all system on a regular basis;
• 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, 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.
  • Sometimes, 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.
• In general, the vendor will be responsible for the following three activities:
  ▪ High availability of PeopleSoft infrastructure – Windows server, SQL Database Servers, Weblogic, etc.
  ▪ Application/web servers in the line of managed services.
  ▪ Applying mandatory patches on an on-going basis at PeopleSoft servers to keep it current
  ▪ As-needed support on the functional / development side for all 4 applications – Campus Solutions, Finance, HCM and Interaction Hub.
• About the type of support: remote or onsite
  • Generally, RIC does not mind to receive consulting support remotely. In fact, RIC does allow consultants to access RIC systems remotely, and many trouble-shooting service calls could be done remotely.
However, it is important to understand that RIC may need consultants to provide onsite services sometimes.

- For all vendors, if the rates for remote support and onsite support are different, please list them. It is worth noting that the onsite 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.
- The cost should be a flat rate. It would make sense for a vendor to offer two different prices for each category: one for remote support, and the other for onsite support.

About Oracle Cloud
- RIC is still evaluating its long-term plan for the College’s Administrative Systems.
- Migrating to Oracle Cloud is one of the options to be considered. It will be nice to have a consultant who have experience in Lift & Shift for migrating on premise PeopleSoft systems migrate to Oracle Cloud.

About Vendor Selection
- RIC does not have a limit on how many vendors to be selected, 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.
- 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 Interaction Hub/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.

About Offshore Vendors
- At the same time, RIC does not accept Offshore vendors due to various requirements about College data.

About Implement New Features
- 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. However, it is important for vendors to know that RIC has worked hard to minimize customizations to our Oracle/PeopleSoft environment. We will only implement new features provided by Oracle. If some non-Oracle features are desired, we will have to evaluate the request seriously before deciding if those features will be implemented.
• It is RIC’s goal to keep its systems up-to-date. All upgrades/fixes & patches will need to be current.
• As of today, RIC’s plan to complete the 9.2 upgrade. Once the upgrade is completed, we would like to enable the Fluid GUI so that RIC’s PeopleSoft system will be mobile friendly.

• About RIC’s Customization
  • RIC has been rated as one of the top schools in the nation as having very few customizations objects in our PeopleSoft environment.

• About RIC’s Team:
  • RIC has two PeopleSoft support teams:
    ▪ Application Development Team: 7 programmers (including a manager), covering CS, HR, and Financials.
    ▪ DBA/Technical Support Team: 1 DBA/PeopleSoft Admin, and 1 Help Desk staff, covering all PS modules and the Portal. This is the team may need consultant the most.

• Expected Consultant Team:
  • We will need 1~2 strong technical consultant for all of the following (need immediately):
    ▪ Supporting PeopleSoft Admin
    ▪ Supporting DBA (Microsoft SQL Database)
    ▪ Interaction Hub/Portal
    ▪ Other underlying environments
      • Weblogic
      • Taxedo
      • Windows
      • Active Directory/LDAP
      • Others
  • Need 1~2 strong business consultant for each of the PeopleSoft modules (on a as needed basis):
    ▪ Campus Solutions
    ▪ Financials
    ▪ HR

• About RIC’s Near-Term & Long-Term Plan
  • RIC’s near term plan is to complete the 9.2 upgrade for all systems. The plan is to complete all upgrades by early 2020; The next phase is to enabling mobile GUI by enabling Fluid. RIC will need the selected vendor to do the following:
    ▪ Interaction Hub Branding using Fluid technology
    ▪ Enabling Fluid mobile friendly GUI
  • RIC’s long term plan is to migrate it’s on premise systems to cloud.
SECTION 4: PROPOSAL

A. Technical Proposal
Narrative and format: The proposal should address specifically each of the following elements:

Technical Background

Rhode Island College runs Oracle’s PeopleSoft Enterprise Systems, which include several modules (Campus Solutions, Financials, HR, and Interaction Hub):

- PeopleSoft Enterprise Interaction Hub (Portal): Currently on 9.1/Tools 8.56
  - Will be on PeopleTools 8.57 by the end of 2019;
- Campus Solutions: Currently on 9.0/Tools 8.53
  - Will be on v9.2 and PeopleTools 8.57 by 01/2020;
- Human Resources: Currently on 9.2/Tools 8.56
  - Will be patched to PeopleTools 8.56.13 in early 2020
- Financials: Currently on 9.2/Tools 8.55
  - Will be on PeopleTools 8.57 by early 2020;

The hardware platform for the Oracle/PeopleSoft ERP System at Rhode Island College is virtualized. By the end of December 2019, RIC will have updated all systems to the following versions:

- Database Engine:
  - Microsoft SQL Server 2017 (with AlwaysOn featured turned on)
  - Rhode Island College does not have any Oracle databases.
- Most of the new servers are running on Windows 2016 or 2019.
- All of the PeopleSoft systems at Rhode Island College in production will be running on Microsoft SQL 2017.

RIC currently owns the following modules/components: MicroFocus (for Cobol), Grants, Time And Labor, Budgets, Purchasing, Financial Aid, Project Costing, Learner Services, Asset Management, Benefits Admin, Student Records, Billing, Student Financials, Academic Advisement, Payroll, Human Resources, Accounts Payable, Campus Community, Admissions, General Ledger, Inventory, Outreach, Faculty Management, Personal Portfolio, Involvement, Accts Receivable, Alumni Development/Advancement. All PeopleSoft Web services are running on Tuxedo/Weblogic servers.
There are several 3rd party software systems currently integrated with PeopleSoft (including, but not limited to, CashNet/HigherOne (Cashering, eBilling), EMS (Event Management and Course Scheduling), StarFish, SmartCatalog, CollegeNet, MediCat, 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.

A. Technical Proposal

Narrative and format: The proposal should address specifically each of the following elements:

1. Company Experience—
   a. Please provide your company’s consulting experience that are relevant to the scope of the 6 sub-categories defined by this RFP:
      i. PeopleSoft Human Resources (HR)
      ii. PeopleSoft Campus Solutions (CS)
      iii. PeopleSoft Financials (Fin)
      iv. PeopleSoft Interaction Hub (Portal Technology)
      v. PeopleSoft Technologies (including, but not limited to, PeopleTools, Tuxedo/WebLogic, Integration Broker, Elastic Search, and all PeopleSoft related technologies)
      vi. PeopleSoft Underlying Technologies (including, but not limited to, Microsoft SQL administration (especially SQL 2017), Windows server administration, Network Technology, Load Balancing, Active Directory/LDAP, etc.)
   b. For each of the services for the corresponding sub-category, please provide the cumulative total number of clients that you have had and the percentage of Higher Education clients;

2. Specialty Expertise Coverage - Please provide the following:
   a. Please describe your company’s service coverage areas, in terms of the 6 sub-categories listed below, along with your experience and expertise in each of the 6 areas:
      i. PeopleSoft Human Resources (HR)
      ii. PeopleSoft Campus Solutions (CS)
      iii. PeopleSoft Financials (Fin)
      iv. PeopleSoft Interaction Hub (Portal Technology)
      v. PeopleSoft Technologies (including, but not limited to, PeopleTools, Tuxedo/WebLogic, Integration Broker, Elastic Search, and all PeopleSoft related technologies)
      vi. PeopleSoft Underlying Technologies (including, but not limited to, Microsoft SQL administration (especially SQL 2017), Windows server administration, Network Technology, Load Balancing, Active Directory/LDAP, etc.)
b. Please provide resumes/CVs of the consultants who will be assigned to RIC. Please clearly describe their qualifications and experience, and clearly indicate their experience in the 6 sub-categories in which they specialize:

i. PeopleSoft Human Resources (HR)
ii. PeopleSoft Campus Solutions (CS)
iii. PeopleSoft Financials (Fin)
iv. PeopleSoft Interaction Hub (Portal Technology)
v. PeopleSoft Technologies (including, but not limited to, PeopleTools, Tuxedo/WebLogic, Integration Broker, Elastic Search, and all PeopleSoft related technologies)
vi. PeopleSoft Underlying Technologies (including, but not limited to, Microsoft SQL administration (especially SQL 2017), Windows server administration, Network Technology, Load Balancing, Active Directory/LDAP, etc.)

3. Interview – After the initial evaluation, vendors meeting the minimum number of points on the Technical Proposal will be qualified to participate in the Interview stage. Vendors and their consultants will have the opportunity to show the Committee the company’s strength and their consultants’ qualifications. The Interview will be evaluated based on the following:

a. Vendor’s presentation & demonstrated record of success
b. Consultants’ qualification presentation
c. Reference check of the company and the consultants

Successful vendor(s) will receive written notice if they have been qualified for an Interview and be provided with presentation information.

Please note: Only qualified vendors will participate in the Interview. The State reserves the right to request detailed responses to follow-up questions identified during the interview.

B. Cost Proposal

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

<table>
<thead>
<tr>
<th>Consultant Service</th>
<th>$ (Hourly Rate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Expert Consulting Services – On Site</td>
<td></td>
</tr>
<tr>
<td>Technical Expert Consulting Services - Remote</td>
<td></td>
</tr>
<tr>
<td>Business Expert Consulting Services – On Site</td>
<td></td>
</tr>
<tr>
<td>Business Expert Consulting Services - Remote</td>
<td></td>
</tr>
</tbody>
</table>
The price will be evaluated along with the above items as a factor in selection. **Price response should include cost 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 Rhode Island College 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).

**C. ISBE Proposal**

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

**SECTION 5: EVALUATION AND SELECTION**

Proposals shall be reviewed by a technical evaluation committee (“TEC”) comprised of staff from State agencies. The TEC first shall consider technical proposals.

Technical proposals must receive a minimum of 50 (71.4%) out of a maximum of 70 points to advance to the cost evaluation phase. Any technical proposals scoring less than 50 points shall not have the accompanying cost or ISBE participation proposals opened and evaluated. The proposal will be dropped from further consideration.

Technical proposals scoring 50 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The Division of Purchases reserves the right to select the vendor(s) or firm(s) (“vendor”) that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Experience</td>
<td>20 Points</td>
</tr>
<tr>
<td>Specialty Expertise Coverage</td>
<td>35 Points</td>
</tr>
<tr>
<td>Interview</td>
<td>15 Points</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Points</th>
<th>Total Possible Technical</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>70 Points</strong></td>
<td></td>
</tr>
</tbody>
</table>
*Cost Proposal Evaluation:
The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

\[
(\text{lowest cost proposal} / \text{vendor’s cost proposal}) \times \text{available points}
\]

For example: If the vendor with the lowest cost proposal (Vendor A) bids $65,000 and Vendor B bids $100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B’s cost points are calculated as follows:

\[
\frac{65,000}{100,000} \times 30 = 19.5
\]

**ISBE Participation Evaluation:**

a. Calculation of ISBE Participation Rate

1. ISBE Participation Rate for Non-ISBE Vendors. The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor’s total contract price that will be subcontracted to ISBEs by the non-ISBE vendor’s total contract price. For example if the non-ISBE’s total contract price is $100,000.00 and it subcontracts a total of $12,000.00 to ISBEs, the non-ISBE’s ISBE participation rate would be 12%.

2. ISBE Participation Rate for ISBE Vendors. The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor’s total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor’s total contract price. For example if the ISBE vendor’s total contract price is $100,000.00 and it subcontracts a total of $12,000.00 to ISBEs and will perform a total of $8,000.00 of the work itself, the ISBE vendor’s ISBE participation rate would be 20%.

b. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

\[
(\text{Vendor’s ISBE participation rate} / \text{Highest ISBE participation rate}) \times \text{Maximum ISBE participation points}
\]

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B’s ISBE participation rate is 12%,
Vendor A will receive the maximum 6 points and Vendor B will receive \((12\% \div 20\%) \times 6\) which equals 3.6 points.

**General Evaluation:**

Points shall be assigned based on the vendor’s clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the TEC to clarify statements made in the proposal.

**SECTION 6. QUESTIONS**

Questions concerning this solicitation must be e-mailed to the Division of Purchases at doa.purquestions3@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. No other contact with State parties is permitted. Please reference **RFP # 7599932** on all correspondence. Questions should be submitted in writing in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases’ website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

**SECTION 7. PROPOSAL CONTENTS**

- Proposals shall include the following:
  
  a. One completed and signed RIVIP Bidder Certification Cover Form (included in the original copy only) downloaded from the Division of Purchases website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov). Do not include any copies in the Technical or Cost proposals.

  b. One completed and signed Rhode Island W-9 (included in the original copy only) downloaded from the Division of Purchases website at /documents/Forms/Misc Forms/13_RI Version of IRS W-9 Form.docx. Do not include any copies in the Technical or Cost proposals.

  c. Two (2) completed original and copy versions, signed and sealed Appendix A. MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. Do not include any copies in the Technical or Cost proposals.

  d. 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 fifty (50) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).


  a. One (1) printed paper copy, marked “Technical Proposal - Original” and signed.
b. Five (5) printed paper copies

e. Cost Proposal - A separate, signed and sealed cost proposal with fee structure proposed as outlined in section 5 to complete all of the requirements of this project.

f. One (1) Electronic copy on a CD-R, marked “Cost Proposal - Original”.
   • One (1) printed paper copy, marked “Cost Proposal - Original” and signed.

g. Five (5) printed paper copies

• Formatting of proposal response contents should consist of the following:

• Formatting of CD-Rs – Separate CD-Rs are required for the technical proposal and cost proposal. All CD-Rs submitted must be labeled with:
   • Vendor’s name
   • RFP #
   • RFP Title
   • Proposal type (e.g., technical proposal or cost proposal)
   • If file sizes require more than one CD-R, multiple CD-Rs are acceptable. Each CD-R must include the above labeling and additional labeling of how many CD-Rs should be accounted for (e.g., 3 CD-Rs are submitted for a technical proposal and each CD-R should have additional label of ‘1 of 3’ on first CD-R, ‘2 of 3’ on second CD-R, ‘3 of 3’ on third CD-R).

Vendors are responsible for testing their CD-Rs before submission as the Division of Purchase’s inability to open or read a CD-R may be grounds for rejection of a Vendor’s proposal. All files should be readable and readily accessible on the CD-Rs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the Division of Purchases may consider it “non-responsive”. USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

• Formatting of written documents and printed copies:
  o For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1” margins on white 8.5”x 11” paper using a font of 12 point Calibri or 12 point Times New Roman.
  o All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor’s name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
  a. The cost proposal shall be typed using the formatting provided on the cost proposal fee structure located on section 5.
  o Printed copies are to be only bound with removable binder clips.

SECTION 8. PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP 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, shall not be accepted.

Proposals should be mailed or hand-delivered in a sealed envelope marked “RFP# 7599932” 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 shall not be accepted. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time shall be determined to be late and shall not be accepted. Proposals faxed, or emailed, to the Division of Purchases shall not be accepted. The official time clock is in the reception area of the Division of Purchases.

SECTION 9. CONCLUDING STATEMENTS

Notwithstanding the above, the Division of Purchases reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award in the State’s 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.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the Division of Purchases.

The State’s General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded for this RFP. The State’s General Conditions of Purchases can be found at the following URL: https://rules.sos.ri.gov/regulations/part/220-30-00-13
Proposer’s ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency’s MBE/WBE Coordinator, Division, ODEO, or Governor’s Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.

2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.

3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency’s MBE/WBE Coordinator, Division, ODEO, or Governor’s Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.

4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.

5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor’s Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.
MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN

| Bidder's Name: |  |
| Bidder's Address: |  |
| Point of Contact: |  |
| Telephone: |  |
| Email: |  |
| Solicitation No.: |  |
| Project Name: |  |

This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

| Name of Subcontractor/Supplier: |  |
| Type of RI Certification: | □ MBE □ WBE □ Disability Business Enterprise |
| Address: |  |
| Point of Contact: |  |
| Telephone: |  |
| Email: |  |
| Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier: |  |
| Total Contract Value ($): |  |
| Subcontract Value ($): |  |
| ISBE Participation Rate (%): |  |
| Anticipated Date of Performance: |  |

I certify under penalty of perjury that the foregoing statements are true and correct.

| Prime Contractor/Vendor Signature | Title | Date |
| Subcontractor/Supplier Signature | Title | Date |