**XXXXXX**

**Implementation of XXXXXX**

**to be done under**

**MEEC IT Professional Consulting Services**

Date:

**Due Date for Responses:**

Submit responses via e-mail to:

NOTE: The requested scope of services is confidential within XXXXXX. No personnel of the Master Contractors are to discuss this TORP with anyone within XXXXXX other than

**PROJECT NAME**:

**1. PROJECT SCOPE:**

**1.1 Purpose**.

Insert Purpose

**2. Task Order Proposal Response Requirements:**

The Task Order Proposal response is to consist of the following:

2.1 Evidence that Master Contractor is a Service Partner, or has subcontracted to a certified Partner as part of the Contractor’s project team.

 ***Note:******It is preferable that the ERP Master Contractor provides the* *requested services directly, however, the ERP Master Contracts do allow for subcontracting. Per 2.2 below, the Task Order Proposal response to the TORP must include a description of the proposed contracting relationship and the roles and responsibilities of the Master Contractor and the subcontractor(s), if any are proposed. These will be factored by XXXXXX into the evaluation of the responses. In addition, the ERP Master Contractor must affirm to XXXXXX that the subcontractor, if any, complies with all of the terms and conditions of the Master Contract and any resulting Task Order Contract.  XXXXXX will not be bound by any terms and conditions between the ERP Master Contractor and a subcontractor, nor will any such agreements be incorporated into the resulting Task Order Contract. The Master Contractor remains responsible and liable for all work done under the resulting Task Order Contract.***

* 1. **A description of the proposed contracting relationship and the roles and responsibilities of the Master Contractor and the subcontractor(s), if any are proposed.**
* Clearly defined roles and responsibilities specifically for XXXXXX’s project between Master Contractor and any and all subcontractor(s) indicating lead and secondary responsibilities
* Master Contractor’s team’s ability and capacity to provide **all** requested services that are stated in the attached Business Need Statement within the specified project timeframe
* Provide prior working relationships on similar and relevant
	1. **Staffing plan** that includes the following:
* Organizational chart of the proposed staffing;
* Names and Qualifications (i.e. resumes) of the staff to be assigned to XXXXXX;
* Roles and responsibilities of the staff to be assigned;
* The assigned staff’s anticipated work schedule; and
* The assigned staff’s other workload assignments during XXXXXX’s project
* The executive management organization and escalation path for issues resolution
	1. **A detailed work plan** (resource loaded with Master Contractor’s, any subcontractor’s, and XXXXXX’s staff) developed specifically for XXXXXX’s project that shows tasks, duration of tasks, relationship/dependencies of tasks, etc.;
	2. **Assumptions including, but not limited to, expectations for XXXXXX and XXXXXX’s project staff**; (See the Business Needs for further information about the XXXXXX project staff.)
	3. **Provide a minimum of two (2) representative clients of the Master Contractor** where such services have been or are being provided including a brief description of the services provided and how long such services have been provided; these services should map to those requested by XXXXXX in similarity, size, and scalability. Appropriate contact information at the client should be provided so that XXXXXX may verify the provided information, if it so elects to do so in this initial phase. **(If Master Contractor is subcontracting to a SERVICES Service Partner, two (2) references of that subcontractor are also to be provided.)**
	4. **Price Proposal:** XXXXXX expects that very competitive pricing will be quoted by qualified Master Contractors.

It is the intent of the University that the Price will consist of:

* + A fixed price, milestone/deliverables based price for the SERVICES implementation.
	+ An hourly resource rate card per resource type (e.g. Project Manager) valid through DATE which will be used as the basis for change orders, enhancements, future phases, and other add-on work. XXXXXX makes no guarantee that there will be any further implementation services awarded. Note: Per the USM ERP Master Contract, the Master Contractor may propose different rates for skill sets required for this engagement that are not currently a part of the Master Contractor’s core staff rates.
	+ All expenses including domestic travel are to be included in the firm’s price for the implementation as well as in the hourly rates of the assigned personnel.

**3. Proposal Submittal, Discussion Sessions, and Evaluation of the Responses:**

3.1 Initial Responses are to be provided electronically by the due date noted above to.

3.2 XXXXXX **reserves the right to shortlist based on the written proposals received, however, XXXXXX intends to hold discussions on Date with all respondents to this TORP.** Master Contractors are advised to set this date aside in its entirety on those persons calendars it deems necessary to be present at such a discussion so that the Master Contractor’s task order proposal can be summarized and discussed thoroughly with XXXXXX.

3.3 XXXXXX reserves the right to reject in whole or in part, any and all task order proposals without liability and/or to accept any response deemed in its best interest.

3.4 Further information may be requested and/or provided by the University during the TORP process.

**4. Award of the Task Order Contract:**

 4.1 Per the Master Contract, XXXXXX may award this Task Order based:

 a) solely on price with the lowest responsive and responsible cost receiving the award;

 b) on a combination of technical and price evaluation/ranking,

c) solely on technical expertise followed by the XXXXXX negotiating a fee with only the top ranked firm; in the event of unsuccessful price negotiations, XXXXXX may discontinue negotiations with the top ranked firm and proceed to the next rank, and so forth.

4.2 It is XXXXXX’s intent to finalize the award and the resulting Task Order Contract no later than December 5, 2014, although an earlier date is highly desirable.

**5. Resulting Task Order Contract:**  The enclosed XXXXXX task order contract (TOC) will be issued to the selected Master Contractor. The TOC incorporates the terms and conditions of the Master Contract as well as include terms and conditions and the Scope of Work specific to this engagement. By responding to the TORP request, the Master Contractor affirms that it has reviewed the enclosed TOC and will execute same if awarded this engagement.

Enclosures: -Business Needs Statement dated

 -Task Order Contract

END OF TASK ORDER REQUEST FOR PROPOSAL 91258

Business Needs Statement for SERVICES Partner

## Introduction

1. Purpose

This document describes XXXXXX’s business need for a certified SERVICES Partner to implement the following SERVICES components, which are critical to XXXXXX business operations.

* **Human Capital Management** - SERVICES HCM supports an organization in organizing, staffing, paying, and developing its global workforce.  SERVICES HCM includes Global Human Resources Management (Workforce Lifecycle Management, Organization Management, Compensation, Business Asset Tracking, Faculty and Academic Management, Absence, and Employee Benefits Administration) and Global Talent Management (Goal Management, Performance Management, Succession Planning, and Career and Development Planning).  SERVICES HCM also includes Project and Work Management designed to enable organizations to create and manage initiatives, projects, and other types of work.  This includes the ability to build project plans and utilize project breakdown structures that include phases, tasks, and milestones as well as plan, staff, and track initiatives, projects, and work efforts.  SERVICES HCM includes connectors that facilitate integration to select SERVICES partners that provide capabilities including: recruiting, learning, time and attendance, and user account provisioning (LDAP/Active Directory).
* **SERVICES Payroll for US** - SERVICES Payroll for US supports the creation and management of Payroll for U.S. employees.  Configure earnings, deductions, accumulations, and balances.  Identify tax authorities each company wishes to withhold for.  Manage worker tax data, payment elections, involuntary withholding orders, and payroll input.  Calculate, review/audit, and complete payrolls and settlement runs. Configure and calculate payroll commitments.  SERVICES Payroll includes connectors that facilitate integration to select SERVICES partners that provide capabilities, including: time and attendance, tax filing, check printing, and direct deposit.
* **Time Tracking** - SERVICES Time Tracking supports an organization in collecting, processing, and distributing time data for its global workforce.  SERVICES Time Tracking module includes the following capabilities:  basic time scheduling, time entry (hourly, time in/time out), approvals, configurable time calculation rules, and reporting.
* **Cloud Connect for Third-Party Payroll** - Cloud Connect for Third-Party Payroll extends SERVICES HCM by providing integrations to third-party payroll providers and aggregators.  Also includes the Payroll Connector (generic integration template that provides a starting point for integration to a third party payroll provider).
1. General Information

|  |  |
| --- | --- |
| **Project Name** | *HCM, Payroll, Time Tracking Project* |
| **Desired Start Date** |  |
| **Desired Date of Completion** | *Phased implementation from*  |

## The Project

1. Business Need

HCM, Payroll, and Time Tracking applications are critical to successful XXXXXX business operations and require a contemporary SaaS solution with 24x7 uptime and reliability. As a result, XXXXXX is implementing components of the SERVICES product suite globally. XXXXXX intends to enter into a SaaS subscription agreement directly with SERVICES. The solution must be fully implemented, integrated, and adopted before

XXXXXX expects the certified SERVICES Partner to lead and direct this initiative using a deliverables-based project model based on successful outcomes. The focus is to understand the unique requirements, processes, organization and environment at XXXXXX and adapt them to leverage SERVICES’s best in class default settings and standards. Specifically, XXXXXX expects the SERVICES Partner to provide expertise to quickly assess, design, configure, and integrate simple process using the SERVICES suite. As such, the business need includes services to design, configure, integrate, migrate data, test, deploy, and train XXXXXX stakeholders on the new processes and platform.

All XXXXXX employees, including, but not limited to full-time, part-time, associates, adjuncts, and student workers are in scope. SERVICES Benefits are out-of-scope due to the State of Maryland’s efforts in this area. Additionally, SERVICES Faculty Management, while part of SERVICES HCM, is not part of this initial implementation, however, XXXXXX reserves, at its sole discretion, the right to amend the resulting Task Order Contract for implementation of future features/products within the SERVICES HCM and/or for additional SERVICES modules such as, but not limited to, Finance.

**To ensure project success, the SERVICES Partner** **will work full-time on-site at XXXXXX’s location** and provide senior-level consultants with extensive knowledge of the SERVICES product suite, associated technologies, and training in industry-leading tools and implementation practices. XXXXXX expects the SERVICES Partner to possess extensive Higher Education experience and understanding. Additionally, XXXXXX expects the SERVICES Partner to have experience integrating PeopleSoft Campus Solutions and Finance integration.

UMUC plans to dedicate full time SMEs for HR, Payroll, business analysis, and integration, with the authority and responsibility to make project decisions on behalf of the University. XXXXXX expects to adopt SERVICES product best practices, processes, and existing feature sets; exception only customization, approved by senior leadership, is undesirable. XXXXXX expects the professional services provider to successfully complete a fixed price, deliverables based set of outcomes.

1. Project Needs/Goals/Scope

The scope of this project includes the complete implementation, integration, and user adoption of the SERVICES components named in the Introduction. **XXXXXX** seeks a SERVICES Partner to complete the following:

* Business Process Leadership and Requirements Definition
* Design
* Configuration
* Integration
* Data Migration
* Reporting, Analytics, Dashboards
* Training, Knowledge Transfer, User Adoption
* Quality Assurance, Testing
* Project Management & Team
	1. **Business Process Leadership and Requirements Definition:**

The SERVICES Partner will provide business process best practices and will solicit, document and review requirements for the XXXXXX SERVICES deployment. The SERVICES Partner will lead onsite workshops at XXXXXX with senior executives and with functional owners with the intent of providing best practices, key data definition, process design, and configuration requirements for XXXXXX. Wherever possible, XXXXXX expects to deprecate existing processes defined in PeopleSoft and adopt standard SERVICES functionality. XXXXXX seeks to avoid customization and unique software development wherever possible. Deliverables include: “To-Be” Process Documentation, Functional Requirements, User Stories and/or Use Cases.

* 1. **Design:**

The SERVICES Partner will provide SERVICES subject matter and technical expertise to provide a comprehensive design. Using iterative design sessions with XXXXXX subject matter experts, the partner will map functional requirements to design elements and identify key integration points and data elements. Deliverables include: Configuration Design, Integration Design, Data Migration Design, User Interface Design.

* 1. **Configuration, Integration**

The SERVICES Partner will implement the approved configuration design in all environments. Deliverables include: Accurately configured SERVICES instances, Roles and Security Configuration, Configured Users Mapping, Configured Objects Identification and Mapping, Operational Manual.

The SERVICES Partner will implement the approved integration design. Integration includes, but is not limited to:

* Single sign-on (SSO) integration with XXXXXX’s SAML 2.0 authority as Identity Provider
* Integration with Taleo, Saba, and other third parties via batch job
* Integration with the state of MD CPB for payroll and benefits processing
* Deliverables include: Commented object model and meta data for both the application logic and structure stored in a configuration management tool under version control, unit tested integrations.

* 1. **Data Migration:**

The SERVICES Partner will collect, analyze, clean, and remove duplicative data prior to migration to SERVICES. Specifically, the partner will design ETL and other migration activities, develop migration protocol and rollback options, execute the migration(s), and validate data quality and completeness post migration. Performing these activities requires that the partner coordinate with XXXXXX SMEs for HR, payroll, and IT. Deliverables include: Data Analysis Document, Data Migration Design, ETL and related scripts, documented test results.

* 1. **Reporting, Analytics, Dashboards:**

Dashboard reporting and analysis capabilities are intended to further enhance deployment and ensure high quality visibility into XXXXXX critical business information. There is a direct correlation between use of executive dashboards and successful user adoption. Based on reporting, tracking and dashboard requirements, the SERVICES Partner should identify and configure reports that can be easily accessible based on user roles and permissions from the existing suite of SERVICES reports. The partner is expected to capture and analyze reporting requirements, identify standard reports and dashboards, and test the efficacy of reports and dashboards with live data. Custom XXXXXX dashboards and reports should be generated by exception only. Deliverables include: fully functioning and tested reports and dashboards that achieve the defined and approved reporting requirements.

* 1. **Quality Assurance and Testing:**

Quality Assurance is an area of utmost importance to XXXXXX. Although it is the obligation of the SERVICES Partner to guard against defects and deficiencies in its implementation, it is expected that the University will also participate in this process. XXXXXX expects the SERVICES Partner to provide documentation of all quality assurance data in a format agreed to by the XXXXXX Project Manager.

The partner is expected to create a test approach, create a test plan, create test cases and scenarios, create test scripts mapped to requirements, execute end-to-end integration testing, and conduct User Acceptance Testing. The SERVICES Partner will also correct any defects identified in its deliverables. XXXXXX is responsible for providing test data, and test environments and accounts for integrated platforms like PeopleSoft Campus Solutions and XXXXXX’s SSO components. Deliverables include: Test Plan, Test Cases, Issues and Defects tracking log with resolution, Test Results generated from an automated testing, Requirements Traceability Matrix

* 1. **Training, Knowledge Transfer, User Adoption:**

The SERVICES Partner will provide role-based and scenario-based SERVICES curriculum, create Quick Reference Guides (QRG), create Participant and Facilitator Guides, and deliver training for all users. The SERVICES Partner is responsible for transitioning training materials and delivering “train-the-trainer” sessions to XXXXXX’s in-house trainers for training of all subsequent users. Furthermore, the partner is expected to establish a XXXXXX knowledge base and transfer operations to XXXXXX SMEs for administration. Deliverables include: Training Curriculum which includes: Quick Reference Guide (QRG), User Manual, Train-the-trainer manual (including role-based and scenario-based exercises), Classroom exercises and examples, Training Summary, including recommendations for changes in application set-up, configuration, and/or process, Data quality and cleansing process

* 1. **Project Management & Team**

Given the critical nature and short timeline of this project, XXXXXX expects the SERVICES Partner to provide a dedicated Project Manager assigned only to XXXXXX for the duration of this project. The SERVICES Partner Project Manager will partner with the XXXXXX Project Manager and will provide regular (no less than weekly) written summaries of key project activities accomplished to-date and key activities to be completed in the up-coming period. The SERVICES Partner PM and XXXXXX PM will publish and maintain a project plan, assign resources, and schedule key milestones for this implementation. The partner will develop a communication and change control plan with key messages, expectations and timing for distribution to the organization. The team will also develop preliminary adoption criteria, reporting and tactics to ensure system utilization like an Adoption Assurance Action Plan. These criteria will be further validated through the Business Process Leadership and Requirements Definition Phase.

Additional Subject Matter Experts (SMEs) must also be dedicated to this project. A staffing plan is expected as part of the SERVICES Partner’s response. XXXXXX **also expects the SERVICES Partner to provide most of its work on-site with limited work activities occurring off-site.**

1. UMUC Staff Transition
	1. SERVICES Partner to specify a recommended transition plan which could consider, but not require, the hiring of XXXXXX in-house staff like administrators, developers, and product SMEs.
2. MBE Goal
	1. The USM ERP Master Contracts have a Goal for the total expenditure. There is 0% subcontracting goal established for this Task Order Scope of Services, however, MBE participation is encouraged and should be addressed, if applicable, within the Task Order Proposal submitted by the Master Contractors