



Contract 3557P

PeopleSoft Human Capital Management Consulting Services

1. Introduction

The City of Richmond proposes to engage the services of a PeopleSoft Human Capital Management (HCM) functional Consultant (“Consultant”) to provide analysis, design, customization and implementation of PeopleSoft Training Administration module, PeopleSoft Performance Management module and integration with the City’s existing PeopleSoft training registration software.

The objective of this request for proposal is to provide the City with qualified proponents capable of carrying out the work herein defined. The subsequent proponent submissions will form the basis for evaluation, interview and selection.

2. Submission Details

Three (3) copies of proposals marked “**PeopleSoft HCM Assignments Consulting Services – Contract 3557P**” addressed to the Purchasing Section, will be received at the Information Counter, Main Floor, Richmond City Hall, 6911 No. 3 Road, Richmond BC V6Y 2C1, until 12:00 Noon local time, Thursday, April 29, 2009. Submissions received after this time will be returned to the sender.

The City reserves the right to cancel this Request for Quotation for any reason without any liability to any proponent or to waive irregularities at their own discretion.

Proposals may be withdrawn by written notice only provided such notice is received at the office of the City’s Purchasing Section prior to the date/time set as the closing time for receiving proposals.

Proposals shall be open for acceptance for 90 days following the submission closing date.

All proposals will remain confidential, subject to the Freedom of Information and Privacy Act.

Any interpretation of, additions to, deletions from, or any other corrections to the Proposal document, will be issued as written addenda by the City of Richmond. It is the sole responsibility of the potential Bidders to check with the City of Richmond’s

Website, and / or BC Bid to ensure that all available information has been received prior to submitting a bid.

3. Enquiries

3.1 Clarification of terms and conditions of the proposal process shall be directed to:

Purchasing

Sumita Dosanjh

Telephone: 604-276-4097

Buyer II – Contracting Specialist

E-mail: purchasing@richmond.ca

Purchasing Section

City of Richmond

3.2 Technical clarification shall be directed to:

Technical

Edward Hung

Telephone: 604-276-4386

Manager,

E-mail: ehung@richmond.ca

Enterprise Application Development

Information Technology

City of Richmond

The City, its agents and employees shall not be responsible for any information given by way of verbal communication.

Any questions that are received by City of Richmond Staff that affect the Proposal Process will be issued as addenda by the City of Richmond.

4. Project Background

The City is in the process of evaluating the PeopleSoft HCM system. Modules include: Training Administration, Performance Management and integration with existing training registration software.

Goals for this upgrade include but are not limited to:

- Extend the usage of the PeopleSoft Training Administration module;
- Utilize the applicable enhancements in the PeopleSoft HCM 8.9;
- Review and improve the interfaces between PeopleSoft HCM and other City's systems;
- Review and improve the current business processes.

5. Project Scope

Consultant Duties

5.1) Overall Responsibilities

Lead the HR Functional Team in the analysis and design of the City's PeopleSoft HCM system. The Consultant will complete the deliverables as outlined. The Consultant will work with the primary users from Human Resources, Public Works and Information Technology.

5.2) Specific Duties

- a) Review the business processes;
- b) Review the application system set up;
- c) Review the user requirements;
- d) Perform fit/gap analysis with HCM users and Information Technology;
- e) Recommend business process changes;
- f) Recommend system design and changes;
- g) Recommend the PS HCM 8.9 system configuration;
- h) Document all recommendations, designs related to the deliverables.

5.3) Deliverables

- a) PeopleSoft HCM Training Administration:
 - 1) Project Charter Document
 - 2) Develop requirements analysis and recommend solutions for work process improvements.
 - 3) Develop a work plan for implementation.
- b) PeopleSoft HCM Performance Management:
 - 1) Project Charter Document
 - 2) Develop requirements analysis and recommend solutions for work process improvements.
 - 3) Develop a work plan for implementation.
- c) Interface – review requirements and recommend solutions for the need of an interface between the City's training registration system and PS HCM.
- d) Review with user departments and recommend business process improvements, in particular, between Human Resources and Public Works areas.

5.4) The consultant is responsible for any additional requirements identified during the engagement

6. City Provided Items

The City will provide a workstation with a telephone, desktop computer, appropriate computer software and network connection for the Consultant to use during the period for this assignment. Any other office supplies or equipment will be the responsibility of the Consultant.

7. Project Schedule

The project is to be completed by December 2009, with work commencing as soon as possible in May 2009. A project schedule is to be submitted with the proposal.

8. Proposal Submissions

All proponents are required to provide the following information with their submissions, and in the order that follows:

- A Corporate profile of their firm outlining its history, philosophy and target market.
- A detailed listing of Human Resources Management background, PeopleSoft system implementation and upgrade experience.
- A description of the Consultant's understanding of the project objectives/outcomes and vision, and how these will be achieved.
- A detailed project methodology explaining each project task including what will be expected of both the Consultant and the City with respect to each task.
- Team Composition – a complete listing of all key personnel who will be assigned to this project. This will include their relevant experience, qualifications for this project, roles and responsibilities, leadership, etc., in addition to their availability for this project.
- A detailed proposal of what will be delivered, including the expected outcome and benefits to the City of Richmond.
- A complete definition of the process that will be employed to meet the objectives of this project, e.g. approach to be taken, feasibility and market study, etc.
- A detailed schedule of all activities, including milestones, project meetings, interim reports and progress reports required for this project.
- Provision of a priced methodology complete with a time allotment for each identified task you propose to employ to carry out the work, this shall form the basis for payments to the successful proponent. Supplement this with a schedule

of fees for staff to be assigned to the project. These rates shall be the basis for adjustments to the value of the contract in the event the scope of work varies from that proposed.

- A minimum of three (3) client references from projects of a similar size and scope.

9. Working Agreement

The successful proponent will enter into a contract for services with the City based upon the information contained in this request for quotation and the successful proponents submission and any modifications thereto.

10. Evaluation Criteria

Proposals shall be evaluated to determine the best value offered to the City against conformance to the following criteria:

- Understanding of project objectives/outcomes and vision
- Project Methodology
- Team Composition – Experience and Qualifications of those staff to be assigned to the project.
- Project Deliverables
- Value for Money
- References
- Interview (if required)



Note: Receipt of this completed form will assist us in calling for future bids. Please complete and submit this form prior to the closing date and time as shown on the Request for Quotation/Proposal/Tender form.
Please remember to include Quotation/Proposal/Tender No. at right.

Quotation/Proposal/Tender No. **?**

A Quotation/Proposal/Tender is not being submitted for the following reason(s):

- | | |
|--|--|
| <input type="checkbox"/> We do not manufacture/supply the required goods/services | <input type="checkbox"/> Cannot obtain raw materials/goods in time to meet delivery requirements |
| <input type="checkbox"/> We do not manufacture/supply to stated specifications | <input type="checkbox"/> Cannot meet delivery requirements |
| <input type="checkbox"/> Specifications are not sufficiently defined | <input type="checkbox"/> Cannot quote/tender a firm price at this time |
| <input type="checkbox"/> Insufficient information to prepare quote/proposal/tender | <input type="checkbox"/> Insufficient time to prepare quote/tender. |
| <input type="checkbox"/> Quantity too small | <input type="checkbox"/> We are unable to competitively quote/tender at this time. |
| <input type="checkbox"/> Quantity too large | <input type="checkbox"/> We do not have facilities to handle this requirement |
| <input type="checkbox"/> Quantity beyond our production capacity | <input type="checkbox"/> Licensing restrictions (please explain) |
| <input type="checkbox"/> Cannot meet packaging requirements | <input type="checkbox"/> Agreements with distributors/dealers do not permit us to sell directly. |
| <input type="checkbox"/> Cannot handle due to present plant loading | <input type="checkbox"/> Other reasons or additional comments (please explain below) |

I / We wish to quote / tender on similar goods / services in future <input type="checkbox"/> Yes <input type="checkbox"/> No	Authorized Company Official – Signature and Title	Date
This space for City of Richmond Comments	Firm Name	
	Address	
	City	
	Province Postal Code	
	Telephone Number	



This Agreement dated the ☼ day of ☼, 2009, at the City of Richmond, in the Province of British Columbia

Between:

City of Richmond
6911 No. 3 Road
Richmond, BC
V6Y 2C1

(the "City")

And:

☼

(the "Consultant")

Whereas:

- A. The City is ☼ (the "Event or Project");
- B. The City requires a ☼ the Event or Project;
- C. The City issued a Request for Quotation ☼ for the supply and delivery of ☼;
- D. The Consultant is willing and prepared to deliver ☼;

NOW THEREFORE in consideration of the mutual covenants and agreements set out below, the parties covenant and agree as follows:

1. Responsibilities and Duties

1.1. The Consultant shall be responsible for the following as per Request for Quotation ☼/Proposal ☼ and the Consultant's submission dated ☼.

- a) ☼
- b) ☼
- c) ☼
- d) ☼
- e) ☼
- f) ☼

- g) ✖
- h) ✖

1.2. The Consultant agrees to conduct himself professionally and with integrity so as not to embarrass or discredit the City throughout the performance of the duties and responsibilities set out in this agreement.

2. Compensation

- 2.1. In exchange for carrying out the duties and responsibilities set out in this agreement, the City agrees to pay to the Consultant, the amount of \$✖ plus GST per ✖ for the duration of the term of this agreement, but total amount of payments not to exceed \$✖ plus GST.
- 2.2. Once per month, commencing no sooner than ✖, the Consultant shall submit to the City a written statement of account and setting out a detailed summary of hours worked, meetings attended and the status of ✖ (the "Statement of Account").
- 2.3. The Statement of Account must show the amount of GST charged and include the Consultant's GST registration number and City Purchase Order number.
- 2.4. The City agrees to make payments to the Consultant within ten (10) working days of receipt of the Consultant's Statement of Account.
- 2.5. The Consultant shall, on a monthly basis, submit to the City a list of expenses incurred in carrying out the duties and responsibilities set out in this agreement and, upon approval of such expenses by the City, the City will reimburse the Consultant for such expenses.

3. Performance Standards

- 3.1. The Consultant is responsible for meeting the following ✖ targets:
 - ✖
- 3.2. The Consultant agrees to comply with following project deadlines:
 - ✖
- 3.3. The Consultant shall prepare a report to the City on a monthly basis indicating ✖ what targets have been met over the preceding month and the status of efforts in relation to the targets set out.

4. Benefits

- 4.1. The Consultant hereby waives all rights, claims, and entitlements whatsoever afforded to employees of the City pursuant to the Group Life Insurance Plan, Long Term Disability Plan and the Dental Plan and any other such benefits. The Consultant agrees to pay, as required by Federal or Provincial Statutes any payments for Income Tax, Workers Compensation, Unemployment Insurance, Canada Pension Plan, Superannuation and other such payments.

5. Independent Contractor

5.1. The Consultant is an independent contractor and no agency, joint venture, association, partnership, employer-employee relationship is created between the City and the Consultant.

6. Assignment And Subcontracting

- 6.1. The Consultant will not, without the prior written consent of the City, assign, either directly or indirectly, any right or obligation of the Consultant under this agreement.
- 6.2. No sub-contract entered into by the Consultant will relieve the Consultant from any of his obligations or impose any obligation or liability upon the City to any such sub-contractor.

7. Indemnity

7.1. The Consultant agrees to indemnify and hold harmless the City, its agents, employees, and elected officials, against any damages, liabilities, or costs, including reasonable attorney fees and defence costs, arising from or allegedly arising from or in any way connected with any act or omission by the Consultant, his employees, officers, volunteers, servants, or agents, or persons for whom the Consultant has assumed responsibility, in the performance or purported performance of this agreement.

8. Insurance

- 8.1. The Consultant shall, at his own expense, carry and keep in force during the term of this agreement, the following coverage.
- a) Professional liability insurance with a minimum limit of \$250,000.00 for each occurrence and \$500,000.00 aggregate.
 - b) Comprehensive general liability insurance with a minimum limit of \$2,000,000 per occurrence with a cross-liability clause.
- 8.2. The City may require a dedicated limit of the Consultant's professional liability policy be allocated to cover the Consultant's work while contracted by the City.
- 8.3. The City shall be added as an additional insured under the Consultant's comprehensive general liability insurance.
- 8.4. All insurance policies shall provide that they cannot be cancelled, lapsed or materially changed without at least 30 days' notice to the City.
- 8.5. Prior to the commencement of the services hereunder, the Consultant shall file with the City a copy of each insurance policy and certificate required. All such insurance shall be maintained until final completion of the service.

9. Representation

9.1. The parties hereto agree that for all purposes hereunder the City shall be represented by the ☉.

10. Ownership of Products

10.1. The City shall take title to and ownership of all materials and products developed by the Consultant pursuant to this agreement, including reports, drawings, schematics, computer files, and designs developed, except those covered by copyright. All materials and products produced shall be provided to the City upon expiry of this agreement.

11. Confidentiality

11.1. The Consultant shall not disclose any information provided by the City, specifically proprietary, sensitive, personal or confidential information or that developed resulting through the performance of this agreement to any other party without the express written consent of the City. All information provided to the Consultant or developed by the Consultant pursuant to this agreement shall be returned to the City upon the expiration of this agreement. The Consultant acknowledges that the City is subject to the Freedom of Information and Protection of Privacy Act of British Columbia.

12. Related Companies

12.1. The Consultant shall not during the term of this agreement, perform a service for or provide advice to any person, firm or corporation where the performance of the service or the provision of the advice may or does, in the opinion of the City, give rise to a conflict of interest between the obligations of the Consultant to the City under this agreement and the obligations of the Consultant to such other person, firm or corporation.

13. Term

13.1. This agreement is valid for the period commencing ☼ and ending ☼ (the "Expiration Date"), or such later date as may be mutually agreed upon.

14. Termination

14.1. Notwithstanding any other provisions of this agreement, either party may terminate this agreement at any time upon at least two (2) weeks' written notice delivered to the Parties at the addresses shown on the first page of this agreement, or such shorter time and in such a manner as may be agreed upon by the parties.

14.2. Notwithstanding the provisions of subsection 14.1, if in the opinion of the ☼, the Consultant has breached a material covenant, the City may cancel this Agreement immediately without notice.

15. Notices

15.1. Any notices or other communications required or permitted hereunder shall be sufficiently given if delivered, or if sent by prepaid regular mail, to the addresses of the parties set out on the first page of this agreement, or to such other addressees as shall have been specified by notice in writing by either party to the other. Any such notice or communication shall be deemed to have been given, if delivered, and if mailed in Canada, on the fourth business day after the date of mailing.

16. Feminine/Masculine

16.1. Wherever the singular or masculine is used throughout these Terms the same shall be construed as meaning the plural, the feminine or body corporate or politic where the context or the parties hereto so require and vice versa.

17. General

17.1. This Agreement may be amended upon mutual agreement of the parties in writing.

17.2. This Agreement and the rights and obligations of the parties hereunder shall be governed by and construed in accordance with the laws of British Columbia.

17.3. This Agreement sets out the entire agreement of the parties and no representations, warranties or conditions have been made other than those expressed or implied herein. No agreement collateral hereto shall be binding upon the City unless made in writing and signed by the City.

The City and the Consultant Agree to these Terms the day and year first above written.

Consultant

City of Richmond



April 21, 2009

Business & Financial Services Department
Telephone: 604-276-4219
Fax: 604-276-4222

To Those Parties Receiving Contract 3557P

Re: Request for Proposal 3557P PeopleSoft Human Capital Management Consulting Services - Addendum No. 1

Dear Sir or Madame,

This addendum forms part of the Contract Documents and shall be read, interpreted and coordinated with all other parts.

1) Question: For estimating purposes, how many business processes are there to review and improve?
Answer: Please base your estimate on your experience in the modules identified in the RFP.

2) Question: What other systems will PeopleSoft HCM interact with other than the Training Software?
Answer: None regarding this RFP.

3) Question: What version is the City's existing PeopleSoft training registration software?
Answer: PeopleSoft HCM version 8.9.

4) Question: Are the project charters identified in 5.3 a and b for the implementation project or for the design project?
Answer: It is for the Design project.

5) Question: My understanding then is that we are to propose individual PeopleSoft HCM Functional Consultants with the specific experience as outlined in the RFP. Correct?
Answer: Yes this is correct.

6) Question: Can you tell me if there is an incumbent?
Answer: We currently have City staff working on this project with HR.

7) Question: In section 4 Project Background it is mentioned that the City is “*in the process of evaluating the PeopleSoft HCM system*” – Does this mean that the City does not currently have PeopleSoft HCM installed? If this is not the case:

a. Question: What version of PeopleSoft HCM is the City of Richmond currently using?

Answer: PeopleSoft HCM Ver 8.9 is currently installed and in production.

b. Question: What PeopleSoft HCM modules does the City of Richmond currently have installed?

Answer: Please refer to the modules identified in the RFP.

8) Question: In Section 4 Project Background it is mentioned that “*Goals for this upgrade include...*” - Is the City considering upgrading to a new version of PeopleSoft as part of this review?

Answer: No, we are not considering a version upgrade at this time. The word "upgrade" refers to enhancing the functional abilities of the module.

9) Question: Do all the Specific Duties outlined in Section 5.2 relate to the use of the *Training Administration, Performance Management* modules and relevant interfaces or is this a broader review of HR's use of PeopleSoft HCM?

Answer: We are just looking at the modules identify in the RFP. This is not a broader review.

10) Question: In Section 5.3 c) the scope includes a review of the interface between the training registration system and HCM – is that the only interface review required? If not, what other systems need to be considered?

Answer: Yes, this is the only interface for this RFP.

11) Question: Our initial understanding was that you were asking firms to provide a PeopleSoft HCM Functional Consultant but we then thought that you may be seeking a Senior Project Manager type of resources with PS HCM expertise to manage the project which would include a team of PS resources. Our confusion came in regarding use of the phrase "team composition".

Answer: No, We are not looking for a Senior PM. The term "team composition" just refers to some organizations that may have functional consultants specializing in different modules of PeopleSoft.

12) Question: Please detail each consultant's experience. Could you give us additional detail?

Answer: Please refer to RFP.

Yours truly,

Sumita Dosanjh
Buyer II - Contracting Specialist



April 23, 2009

Business & Financial Services Department
Telephone: 604-276-4219
Fax: 604-276-4222

To Those Parties Receiving Contract 3557P

Re: Request for Proposal 3557P PeopleSoft Human Capital Management Consulting Services - Addendum No. 2

Dear Sir or Madame,

This addendum forms part of the Contract Documents and shall be read, interpreted and coordinated with all other parts.

1. **Question:** Is this the City of Richmond's estimate for completion of the consultant duties and associated deliverables outlined in Section 5 Project Scope or does this end date include implementation (ie. Build, Test, Deploy) of the PeopleSoft HCM configuration identified in the Analyze and Design phases.

Answer: This RFP includes implementation.

2. Please delete the following

2. Submission Details:

Three (3) copies of proposals marked "**PeopleSoft HCM Assignments Consulting Services – Contract 3557P**" addressed to the Purchasing Section, will be received at the Information Counter, Main Floor, Richmond City Hall, 6911 No. 3 Road, Richmond BC V6Y 2C1, until 12:00 Noon local time, Thursday, April 29, 2009. Submissions received after this time will be returned to the sender.

And replace with:

2. Submission Details:

Three (3) copies of proposals marked **“PeopleSoft HCM Assignments Consulting Services – Contract 3557P”** addressed to the Purchasing Section, will be received at the Information Counter, Main Floor, Richmond City Hall, 6911 No. 3 Road, Richmond BC V6Y 2C1, until 12:00 Noon local time, Thursday, April 30 2009. Submissions received after this time will be returned to the sender.

Yours truly,

Sumita Dosanjh
Buyer II - Contracting Specialist



April 27, 2009

Business & Financial Services Department
Telephone: 604-276-4219
Fax: 604-276-4222

To Those Parties Receiving Contract 3557P

Re: Request for Proposal 3557P PeopleSoft Human Capital Management Consulting Services - Addendum No. 3

Dear Sir or Madame,

This addendum forms part of the Contract Documents and shall be read, interpreted and coordinated with all other parts.

1. Question: The RFP indicates that you are utilizing PeopleSoft HRMS 8.9. With Oracle's application support expiring in December 2009 and tax and legal support expiring in December 2010, please advise on your strategy for continuing on this platform and if there are any plans for upgrading in the next two years.

Answer: This is beyond the scope of the RFP.

2. Question: If there are plans for upgrading within the next two years, please comment on how you see this impacting the scope of this project.

Answer: This is beyond the scope of the RFP.

3. Scope

A. Question: Please confirm that the PeopleSoft modules in-scope for this project include PeopleSoft's Administer Training and Manage Employee Review modules and does not include PeopleSoft's Enterprise Learning Management (ELM) or ePerformance Management modules.

Answer: Please refer the Request for Proposal.

B. Question: What audiences will be serviced through the Training Administration module (e.g., all employees, supervisors, contractors)?

Answer: Employees in City of Richmond Human Resources and City of Richmond Public Works.

C. Question: What audiences will be serviced through the Performance Management module (e.g., all employees, supervisors)?

Answer: Employees in City of Richmond Human Resources and City of Richmond Public Works.

4. Question: Please indicate whether any formal requirement definition work has already taken place for the modules in-scope for this project.

Answer: None

5. Question: Please confirm that the target completion by December 2009 is in reference to the scope of this phase of the project (as defined in the RFP) vs. a targeted go-live by this date.

Answer: This Request for Proposal includes implementation.

A. Question: Please comment on the driver for this December date. Depending on the complexity and scope of requirements, we may be able to complete this phase of work ahead of the targeted date.

Answer: The driver will be based on the requirements.

6. Question: Can you briefly describe how training administration processes are being managed today, including any technologies used?

Answer: These questions will be answered as part of the requirement analysis.

A. What is the approximate number of the learning offerings in the current catalog?

B. Is the bulk of training web-based vs. instructor led, assigned vs. employee initiated?

C. Is training enrollment currently managed through PeopleSoft's self-service tool, PeopleSoft eDevelopment, or any solution?

D. Is there a separate training delivery platform to deliver training (e.g., KnowledgePlanet, SkillSoft, Mzinga)?

E. Are the PeopleSoft base tables for the Administer Training module used even though the business processes of these modules have not been deployed?

F. If other systems or databases are used, is there a requirement for history from these technologies to be converted to PeopleSoft?

7. Question: Can you briefly describe how performance management processes are being managed today, including any technologies used?

Answer: These questions will be answered as part of the requirement analysis.

A. Is there a single performance cycle for all populations, or are there multiple cycles for distinct populations?

B. Are the PeopleSoft base tables for the Manage Employee Review module used even though the business processes of these modules have not been deployed?

C. If other systems or databases are used, is there a requirement for history from these technologies to be converted to PeopleSoft?

8. Question: Are the current programs, policies and practices (including levels of approval) for training administration and performance management well defined and expected to continue forward, or are there expected changes that will impact the scope of this project?

Answer: These questions will be answered as part of the requirement analysis.

9. Question: What portal software, if any, does the City currently use? What HR information or transactions are delivered through this portal?

Answer: We are not using any Portal software.

10. Question: What is your expectation regarding on-site support during the duration of this project? Will it be possible for consultants to work remotely when in-person meetings are not required?

Answer: Yes, remote access is available.

11. Question: Please advise on how much emphasis will be placed on Canadian client experience in the selection criteria.

Answer: Please refer to the RFP for the Evaluation Criteria.

12. Question: Is the proposal for a Lead functional consultant or is it for an end-end implementation of Peoplesoft training admin , Performance management and Integration? The sections 1 and 5 describes about the Functional consultant role where as sections 8 (Proposal submission) asks for Project methodology, Team composition etc. Please clarify.

Answer: The RFP is for a lead functional consultant.

Yours truly,

Sumita Dosanjh
Buyer II - Contracting Specialist