



4229P – PeopleSoft HCM Technical Consulting Services

1. Introduction

The City of Richmond (the “City”) requires the services of a PeopleSoft technical consultant (the “Consultant”) to assist in the technical upgrade of the PeopleSoft HCM software system (PeopleSoft Change Assistant) from release 8.9 to release 9.1, and to assist in the analysis & design, development and implementation of additional features and expanded usage of the PeopleSoft HCM software as part of the upgrade project.

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. Definitions

2.1 Throughout this Request for Proposal the following definitions apply:

- a) “BC Bid” means the electronic tendering service maintained by the Province of British Columbia located online at www.bcbid.ca, or any replacement website;
- b) “City” means the City of Richmond, British Columbia;
- c) “Contract” means the written agreement resulting from this Request for Proposal executed by the City and the Vendor for the Work;
- d) “Lead Proponent” is the Proponent whose Proposal, as determined through the evaluation criteria described in this RFP, provides the best overall value in meeting the requirements of the RFP, and with whom a Contract will be considered;
- e) “Proposal” means a proposal submitted by a Proponent in response to this Request For Proposal;
- f) “Proponent” means an individual or a company that submits, or intends to submit, a Proposal in response to this Request for Proposal;
- g) “RFP” or “Request for Proposals” means this request for proposals, inclusive of all appendices and any addenda that may be issued by the City;

- h) “Shall”, “Will” and “Must” means a requirement that must be met in order for a Proposal to receive consideration;
- i) “Should” or “May” means a requirement having a significant degree of importance to the objectives of the Request for Proposal which will be considered in analysing the Proposals;
- j) “Submission” means a proposal submitted by a Proponent in response to this RFP;
- k) “Successful Proponent” means the same as “Vendor”
- l) “Vendor” means the Successful Proponent to this Request for Proposal who enters into a written Contract with the City to perform and to oversee the Work;
- m) “Work” means the provision of all labour, services, material and equipment, and any action as necessary for the Preferred Proponent to complete and perform its obligations in accordance with the terms and conditions of the Contract.

3. Submission Details

- 3.1 Five (5) copies of proposals marked “**Contract 4229P – PeopleSoft HCM Technical Consulting Services**” 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 **Monday February 28, 2011 at 12:00 Noon PST**. Submissions received after this time will be returned to the sender.

4. Enquiries

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

Sumita Dosanjh, Buyer II – Contracting Specialist
E-mail: purchasing@richmond.ca
Purchasing Section
City of Richmond
- 4.2 The City, its agents and employees shall not be responsible for any information given by way of oral or verbal communication.
- 4.3 The City will only respond to questions that are submitted in writing. Any questions that are received and answered by City of Richmond Staff that affect the Proposal Process, any interpretation of, additions to, deletions from, or any other

corrections to the Request for Proposal document, may be issued as written addenda by the City of Richmond. It is the sole responsibility of the potential Proponents to check with the following websites to ensure that all available information has been received prior to submitting a proposal:

- a) City of Richmond: <http://www.richmond.ca/busdev/tenders.htm>
- b) BC Bid: <http://www.bcbid.gov.bc.ca/open.dll/welcome?language=En>

5. Terms of this Request for Proposal

- 5.1 Proposals shall be open for acceptance for 14 days following the submission closing date.
- 5.2 The City reserves the right to cancel this Request for Proposal for any reason without any liability to any proponent or to waive irregularities at its own discretion.
- 5.3 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.
- 5.4 Except as expressly and specifically permitted in these instructions, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the RFP, and by submitting a proposal each proponent shall be deemed to have agreed that it has no claim.
- 5.5 Proponents are advised that the City will not necessarily accept any Proposal and the City reserves the right to reject any or all Proposals at any time without further explanation or to accept any Proposal considered advantageous to the City.
- 5.6 A Proposal which contains an error, omission, or misstatement, which contains qualifying conditions, which does not fully address all the requirements of this RFP, or which otherwise fails to conform to the requirements in this RFP may be rejected in whole or in part by the City at its sole discretion.
- 5.7 The City may waive any non-compliance with the RFP, specifications, or any conditions including the timing of delivery of anything required by the RFP and may, at its sole discretion, elect to retain for consideration Proposals which are non-conforming, which do not contain the content or form required by the RFP or because they have not complied with the process for submission set out herein.
- 5.8 The City may choose, at its sole discretion, to proceed with all of the components of the Work, none of the components or selected components of the Work.

- 5.9 All Proposals will remain confidential, subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

6. Negotiations

- 6.1 The award of the contract is subject to negotiations with the Lead Proponent. Such negotiations include, but are not limited to, the following:
- a) changes or work refinements in the service requirements or scope of work proposed by the Lead Proponent;
 - b) price – if directly related to a change or refinement in the proposed scope of work proposed by the Lead Proponent and
 - c) specific contract details as deemed reasonable for negotiation by the City of Richmond.
- 6.2 If a written contract cannot be negotiated within 14 days of notification to the Lead Proponent, the City may, at its discretion at any time thereafter, terminate negotiations with the Lead Proponent and either enter into negotiations with the next qualified Proponent or cancel the RFP process and not enter into a contract with any Proponent.

7. Project Background

The City is currently running the PeopleSoft HCM 8.9 software system. The modules include: Payroll for North America, Human Resources, Base Benefits, and Time & Labour. The GL Interface integrates with the PeopleSoft Financials 9.0 General Ledger and Project Costing subsystems, and with the City's Hansen Asset Management system.

The PeopleSoft HCM system also interfaces with the Performance Objects software system for performance management (the application server is on site), and the HireDesk software for recruitment purposes (a hosted application).

The City is currently planning the upgrade of the PeopleSoft HCM software from the current release 8.9 to the latest HCM release 9.1 with the implementation of additional functionality as part of the upgrade project scope.

8. Project Scope

8.1 Technical Upgrade (PeopleSoft Change Assistant) Requirements

The Consultant is required to complete the PeopleSoft Change Assistant upgrade of HCM 8.9/PeopleTools 8.46 to HCM 9.1/PeopleTools 8.51 which includes (and is not limited to) performing the initial upgrade, test moves to production on through to final move to production. Extensive hands on upgrade experience is required (specifically with HCM 9.0 and 9.1) including thorough experience and understanding of the PeopleSoft Change Assistant process and methodology; reviewing PeopleTools and Application Release Notes, Updates and Fixes required for upgrade, and identifying potential impacts to customizations.

Duties and deliverables

- Complete the initial upgrade and perform impact analysis on the copy of production;
- Perform multiple test moves to the copy of production, and make adjustments and refine the Change Assistant job and process where necessary;
- Application of PeopleTools patches, and/or Application bundles, and maintenance packs in various upgrade environments where necessary, and refine, and incorporate new updates in the Change Assistant job template;
- Perform the final move to production, and provide application technical support;
- Mentor City IT staff on PeopleSoft upgrade best practices, strategy, and method.

8.2 Requirements for Technical Analysis/Design, Development and Implementation of Additional Functionality

The Technical Consultant must have extensive technical knowledge and experience in PeopleSoft HCM (specifically with release 8.9 to 9.1). The Consultant must have significant technical experience working with multiple jobs, implementation experience of cheque and advice printing using XMLP and online viewing of cheques & advices using XMLP (ePay). Consultant must have experience with PeopleTools 8.5x, and have extensive development experience in: SQR's, queries, online objects (PeopleCode, application engine programs, pages/components, component interfaces, application messaging).

As part of the HCM 9.1 upgrade, we are looking at expanding the usage of the PeopleSoft HCM functionality including the implementation of the following features/modules:

- a) Multiple Jobs (currently the City is using single job)
- b) Profile Management
- c) Employee Self Service – eProfile and ePay.

a) Multiple Jobs

Customizations have been made to the delivered system in the areas as listed below. The customizations are minimal with the bulk of the changes in PeopleCodes. The technical consultant is required to perform the duties and provide the deliverables as described.

- SQR's
- Application Engine programs
- PeopleCode
- Records and Fields
- Pages and Components
- Menu
- Crystal Report
- Integration Broker (Application Messaging)
- Component Interface
- Time & Labour Rules
- GL Interface

City of Richmond has also done in-house software development work in the following with queries:

- SQR's
- Application Engine programs
- Online Objects – Pages/components, Records and Fields, PeopleCodes, Menu.
- Queries – bulk of the changes.

Duties and Deliverables

- Perform impact analysis - research and identify database objects and code lines for changes required.
- Modify database objects and code lines, including queries.
- Identify changes required to operating procedures.
- Provide directions to clerical staff to modify operational documents.
- Perform system testing on full cycle of pay run, including benefits.
- Perform system testing on year end procedures, including benefits.
- Provide all related documentation and/or specifications for the deliverables.

b) Employee Self Service

Duties and Deliverables:

- Analyse and scope out the efforts and requirements (including server configuration & application configuration) in order to roll out Employee Self Service with eProfile and ePay. Document the requirements and configurations.
- Prepare functional and technical specifications for customizing the XMLP templates/forms, cheque/advice printing and online cheque viewing using XMLP.
- Mentor City IT developers to develop and implement the ePay and eProfile functionality.
- Develop Employee Self Service test plan.

c) Profile Management

Duties and Deliverables

- There may be potential data conversion requirements with the implementation of the Profile Management module.
- Research and identify data conversion where applicable (including database objects, code lines and interfaces).
- Develop data conversion programs.
- Modify database objects and code lines.
- Provide all related documentation and/or specifications for the deliverables.

9. 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.

10. Project Schedule

The project is targeted to complete by December, 2011, with the technical Change Assistant upgrade work commencing in March, 2011, and the analysis and development work to commence following the completion of the first test move to production task in the upgrade process. We are interested in proposals that can come as close as possible to this date. A project schedule, broken down for each phase is to be submitted with the proposal.

11. Proposal Submissions

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

1. A Corporate profile of their firm outlining its history, philosophy and target market.
2. A detailed listing of web software development experience.
3. A description of the Consultant's understanding of the project objectives/outcomes and vision, and how these will be achieved.
4. 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.
5. 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.
6. A detailed proposal of what will be delivered, including the expected outcome and benefits to the City of Richmond.
7. 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.

8. A detailed schedule that is broken down by each phase of the project. Include all activities, including milestones, project meetings, interim reports and progress reports required for this project.
9. Provision of a priced methodology complete with a time allotment for each identified phase, this shall form the basis for payments to the successful proponent. An all inclusive fixed price budget for the delivery of the project and work is to be submitted with the proposal. The pricing submission must be itemized separately, detailing the cost for each phase of the project. 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.
10. A minimum of three (3) client references from projects of a similar size and scope.

12. Review of Proposals

- 12.1 The City will review the Proposals submitted to determine whether, in the City's opinion, Proponents have demonstrated the required experience and qualifications to fulfill the obligations of the services identified in this RFP.
- 12.2 The City, in its sole discretion and without having any duty or obligation to do so, may conduct any inquiries or investigations, including but not limited to contacting references, to verify the statements, documents, and information submitted in connection with the Proposal and may seek clarification from the Proponent's clients regarding any financial and experience issues.
- 12.3 Proposals shall be evaluated to determine the best value offered to the City against conformance to the following criteria:
 - a) Understanding of project objectives/outcomes and vision.
 - b) Project Methodology.
 - c) Team Composition – Experience and Qualifications of those staff to be assigned to the project.
 - d) Project Deliverables.
 - e) Value for Money.
 - f) References.
- 12.4 Proponents may be scheduled for an interview at the discretion of the City.

13. Non-Conforming Proposals

13.1 Proposals which fail to conform to the Format Requirements or which fail to conform to any other requirement of this RFP may be rejected by the City. Notwithstanding the foregoing or any other provision of this RFP, the City may at its sole discretion elect to retain for consideration Proposals which deviate either materially from the format requirements set out in hereto or which otherwise fail to conform to any other requirement of this RFP except the requirement of delivery of the Proposal prior to Closing Time.

14. RFP Process

14.1 The City may unilaterally take the following actions, and shall not be liable for any such actions:

- a) amend the scope and description of the products and services to be procured as described in this RFP, and the qualifications that may be required to meet those requirements;
- b) reject or accept any or all Submissions;
- c) cancel the RFP process at any time and reject all submissions; or
- d) cancel the RFP process and recommence in respect of the same RFP with the same or an amended set of documents, information and requirements.

14.2 The Proponent acknowledges and agrees that any RFP is in no way whatsoever an offer to enter into an agreement and submission of a Request of Proposal by any Proponent does not in any way whatsoever create a binding agreement. The Proponent acknowledges that the City has no contractual obligations whatsoever arising out of the RFP process.

15. Working Agreement

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

15.2 Proponents may include their standard terms of engagement with the Proposals.

16. Information Disclaimer

16.1 The City and its directors, officers, employees, agents, consultants and advisors are not liable or responsible for any verbal or written information, or any advice, or any

errors or omissions, which may be contained in this RFP or otherwise provided to any Proponent pursuant to this RFP.

- 16.2 The Proponent shall conduct its own independent investigations and interpretations and shall not rely on the City with respect to information, advice, or documentation provided by the City. The information contained in this RFP is provisional and will be superseded by other agreement documents.
- 16.3 The City makes no representation, warranty, or undertaking of with respect to this RFP and the City and its directors, officers, employees, agents, consultants and advisors, shall not be liable or responsible for the accuracy or completeness of the information in this RFP or any other written or oral information made available to any interested person or its advisors, and any liability however arising, is expressly disclaimed by the City.