



4261P – PeopleSoft HCM Functional Consulting Services

1. Introduction

The City of Richmond proposes to engage the services of a PeopleSoft Human Capital Management System functional consultant (the “Consultant”) to assist in the upgrade of the Peoplesoft HCM system from release 8.9 to 9.1, and the 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) “HCM” means the PeopleSoft Human Capital Management software system.
- e) “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;
- f) “Proposal” means a proposal submitted by a Proponent in response to this Request For Proposal;
- g) “Proponent” means an individual or a company that submits, or intends to submit, a Proposal in response to this Request for Proposal;

- h) “RFP” or “Request for Proposals” means this request for proposals, inclusive of all appendices and any addenda that may be issued by the City;
- i) “Shall”, “Will” and “Must” means a requirement that must be met in order for a Proposal to receive consideration;
- j) “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;
- k) “Submission” means a proposal submitted by a Proponent in response to this RFP;
- l) “Successful Proponent” means the same as “Vendor”
- m) “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;
- n) “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 4261P – PeopleSoft HCM Functional 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 **Thursday March 17, 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 (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 included in the scope of the upgrade.

8. Project Scope

The City is looking at expanding the usage of the PeopleSoft HCM system with the implementation of delivered features/modules which includes:

- Manage temporary assignments using Multiple Jobs.
- Implement Profile Management - to manage job evaluation requests and job profiles.
- Implement Employee Self Service to view and update selected employee data (eProfile), and to view paycheques and advices (ePay).
- Explore the feasibility of implementing additional human resources modules such as: Training Management, Smart Hire, Mass Update in a future phase following the upgrade.

The Consultant must have extensive functional knowledge and experience in PeopleSoft HCM software (specifically with release 8.9 to 9.1), Human Resources and Payroll Departments. The Consultant should have significant functional and implementation experience working with multiple jobs, Employee Self Service and Profile Management. The consultant must have extensive experience performing PeopleSoft HCM fit/gap analysis, functional analysis and design. The Consultant will complete the duties and deliverables as outlined.

8.1 Overall Responsibilities

The Consultant will be part of the HCM Upgrade Project Team in the upgrade of the Peoplesoft HCM system from release 8.9 to 9.1. The Consultant will work with the key Human Resources and Payroll users seconded for the project, the Human Resources Department, Payroll Department, and Information Technology department in the assignment. The Consultant will be the key HCM functional expert, and will be the functional lead to the Upgrade Project Team and Departments. The Consultant will be responsible for the implementation of the functionalities described, provide knowledge transfer to City staff, and will complete the duties and deliverables as outlined.

8.2 Management of Temporary Assignments

The City is considering the implementation of Multiple Jobs in the management of employees' temporary assignments. Currently, employee job assignments are managed using the Single Job feature, and the system and business processes will need to be enhanced to utilize the Multiple Jobs feature to manage temporary assignments.

Duties and Deliverables:

- Review the user requirements for managing temporary assignments.

- Review existing setup and business processes.
- Perform fit/gap analysis with Human Resources users, Payroll users, Information Technology department, and other impacted departments/users.
- Recommend system and configuration/setup changes and identify related impacts.
- Recommend business process and workflow changes and identify related impacts.
- Provide the functional specifications for changes/customizations and reporting requirements.
- Provide walkthrough with project team and user departments.
- Provide directions for changes to procedures and provide assistance if required.
- Recommend test plan, work with test lead, and assist in unit testing and/or system testing as required.
- Provide documentation of all deliverables including recommendations, configuration, designs and specifications.

8.3 Employee Self Service

The City is considering the implementation of the delivered Employee Self Service modules in the HCM system with initial roll-out to include the following types of self-service transactions:

eProfile:

- Employee View/Update Personal information
Email address, emergency contact, addresses, phone number type transactions.
- Manager - View Personal Information

ePay:

- View Paycheque
- View Direct Deposit information
- View Leave Balances

Duties and Deliverables:

- Review the user requirements to implement Employee Self Service.
- Perform fit/gap analysis with Human Resources users, Payroll users, Information Technology department, and other impacted departments/users.

- Perform functional analysis and design, recommend implementation strategy and provide a detailed implementation plan to roll out the Employee Self Service functionality.
- Determine the user access and security requirements and provide the functional specifications for technical work and/or customizations required.
- Recommend changes to the business process and workflow.
- Setup the self service and workflow configuration.
- Provide directions for new/changes to procedural manuals and provide assistance if required.
- Recommend test plan, work with test lead, and assist in unit testing and/or system testing as required.
- Provide documentation of all deliverables including recommendations, configuration, designs and specifications.

8.4 Profile Management

The City is looking at implementing the Profile Management module in phases beginning with utilizing the module to manage Job Evaluation requests and manage Job Profiles as part of this phase.

Duties and Deliverables:

- Review the user requirements for the management of Job Evaluation requests and requirements for Job Profiles.
- Perform fit/gap analysis with Human Resources users, Information Technology department, and other impacted departments/users.
- Perform functional analysis and design, recommend an implementation approach and plan to manage Job Evaluation requests.
- Recommend and setup the configuration for tracking Job Evaluation requests, and recommend the business process/workflow required.
- Perform analysis and recommend a design solution for Job Profiles which would provide the basic foundation to meet the City's current and future business/functional requirements.
- Provide walkthrough and review with project team and user departments.
- Provide functional specifications for any data conversion requirements where applicable.
- Provide the functional specifications for changes/customizations and reporting requirements.
- Set up the configuration for Profile Management, and provide direction and assistance in setting up Job Profiles as required.

- Provide directions for changes to procedural manuals and provide assistance if required.
- Recommend test plan and assist in unit testing and/or system testing as required.
- Provide documentation of all deliverables including recommendations, configuration, designs and specifications.

8.5 Other Requirements

The City is exploring the feasibility of implementing other delivered HCM features/modules in a future phase. As part of this upgrade, the Consultant will perform the detailed review/analysis and provide the information and details if the features/modules can be a viable solution. An implementation strategy and plan should be provided for future roll-out. All implementation details such as configuration/setup requirements should be documented for reference.

The delivered functional areas include:

- Mass Update – using the functionality to manage across the board salary increases.
- Training Administration - using the module to manage training enrolment, to view training summary & details via self service, and to manage courses.
- SmartHire - to manage the hiring of successful applicants with required data attributes interfaced from the HireDesk recruitment software.

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 timeframe, with the functional work commencing in April, 2011. 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 PeopleSoft HCM system implementation and upgrade 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.