REQUEST FOR PROPOSALS:
ERP SERVICE DELIVERY ASSESSMENT

A. Introduction
The Public Health Institute (PHI) is a global leader in public health. PHI is dedicated to promoting health, well-being and quality of life for people around the world through innovative solutions and collaborative partnerships. Through this Request for Proposals (RFP), PHI seeks bidders to provide the services and specifications as outlined below.

B. Proposal Format
In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. Corporate Overview – A description of the bidder and a list of references
2. Price Proposal – A description of the bidder’s price schedule (monthly/yearly/discounts)
3. Contact Information – A statement of main point of contact for negotiations
4. Examples of similarly complex projects
5. Client References
6. Project timeline with major tasks and milestones

C. Submission of Proposals & Closing Time
Please submit proposals to: Clark Hartsock
Email: chartsock@phi.org

Proposals are due by: Monday, August 15, 2022
9:00am – Pacific Standard Time

• Proposals must be submitted via email by the date and time specified above.
• PHI encourages inquiries concerning this RFP. All questions pertaining to this RFP must be made via email to chartsock@phi.org. Questions are due by 9:00 AM PT, Monday August 8, 2022.
• Bidders should retain a copy of their application and accompanying enclosures for their records

PHI intends to follow the below timeline for review and award of this solicitation:

Questions Due: August 8, 9:00 AM (PT)
Deadline for Submittal: August 15, 9:00 AM (PT)
Review of Proposals: August 15 - August 26, 2022
Interviews or Additional Questions Conducted: August 15 - August 26, 2022
Vendor Selected: August 29, 2022


D. Solicitation Guidelines

1. Agreement
PHI intends to issue a Time and Expense agreement to the successful bidder from this procurement process. The agreement will outline approved billing rates for each type of service provided and the terms and conditions applicable to the work performed.

2. Discretion
PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI’s business needs.

3. Offers/Quotations
Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes prices should remain valid for thirty (30) calendar days from proposal submission.

4. Proposal Costs
There is no reimbursement for costs associated with preparing or submission of proposals in response to this ITB or costs associated with possible award negotiation.

5. Proposal Evaluation
PHI will select the bidders whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI:

- Statement of Work - Up to 10%
- Functional & Technical Capacities - 20%
- Project Timeline - 20%
- Cost Competitiveness - 20%
- Demonstrated Experience - 20%
  - Examples of similarly-complex projects
  - Client references
- Diversity and Inclusion -10%

E. Required Services / Specifications

1. Service Type
   - Professional Services

2. Background
   PHI uses on-premise PeopleSoft v9.2 HCM and FSCM.
PHI runs multiple HCM modules including Absence Management, Core HR, Base Benefits, Benefits Administration, Candidate Gateway, Payroll for NA, Talent Acquisition Management, Time & Labor, Employee Self Service (ESS) and Manager Self Service (MSS).

PeopleSoft HCM integrates with PeopleSoft FSCM for GL, Project Costing and Travel & Expenses.

FSCM modules include: Purchasing, AP, Billing, AR, Project Costing, Grants and Contracts, GL, Commitment Accounting, Travel and Expenses, Banking, Cash, Cash Management

Technical Environment
- PeopleSoft environment resides on VMware VxRail (Virtualized) with Windows 2016 Operating system
- Both PeopleSoft HCM and FSCM Application are on PeopleTools 8.57.13
- PeopleSoft HCM is on PUM Image 31 and FSCM is on PUM Image 36
- PeopleSoft Database is on SQL Server 2017

3. Specifications

Project Goals
The deliverables for this effort include:
1. An evaluation and schematic of the current state of:
   a. Governance
   b. Requirements gathering
   c. Development processes
   d. Testing
   e. Release
2. Evaluation of business units representation and engagement
3. Gap analysis between current development processes and current best practices
4. Recommendations for improvement
5. Evaluation and recommendation for customized interfaces using modern web technologies

Timeline
PHI wished to complete this project in 8 weeks time.

4. Scope of Work
PHI needs an analysis of ERP/IT service delivery. The goal is to characterize the current state of the development process, requirements gathering, and technologies used. This data will inform the generation of recommendations for reengineering, and/or refining, how the IT/ERP technology is supplied and consumed. The person/team performing this work will partner with the Senior IT Director and the Senior Director of Enterprise Applications and work closely with representatives in HR and Finance.

5. Location
Remote
6. **Other Requirements**
   - Experience working with non-profits, federated organizations, and Fiscal Sponsors is an important factor in selection.

7. **Diversity and Inclusion Initiative**
   PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI’s commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:
   - **WOSB**: Women-Owned Small Business
   - **SDVO**: Service-Disabled Veteran-Owned Business
   - **HUBZone**: Historically Underutilized Business Zone
   - **SDB**: Small Disadvantaged Business
   - **8(a)BD**: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American