

# **AMENDMENT 1 FOR RFP NUMBER 0A1128**

**DATE AMENDMENT ISSUED: April 2, 2014**

The State of Ohio, through the Department of Administrative Services, for the Office of Information Technology (OIT), Ohio Administrative Knowledge System (OAKS) is requesting proposals for:

**OAKS (PeopleSoft) Managed Services and Projects**

**INQUIRY PERIOD BEGINS: March 26, 2014**  
**INQUIRY PERIOD ENDS: May 5, 2014**  
**OPENING DATE: May 21, 2014**  
**OPENING TIME: 1:00 P.M.**  
**OPENING LOCATION: Department of Administrative Services  
IT Procurement Services  
Bid Room  
4200 Surface Road  
Columbus, Ohio 43228**

The attached page(s) represent the Request for Proposals (RFP) amendment for the RFP listed above. Please use replacement pages contained in this document to replace the page(s) previously issued by the State.

Specifications and requirements that have been revised are surrounded by double asterisks, bold type and when applicable, strikethrough.

## ATTACHMENT ONE: EVALUATION CRITERIA

The State prefers an integrated response from a single offeror to the requirements in their entirety to this RFP, but acknowledges that certain offerors may have capabilities and experience that uniquely qualify them to perform the OAKS (PeopleSoft) Financial Systems Upgrade. Therefore, the State may award the OAKS (PeopleSoft) Financial Systems Upgrade work (contained in Supplement 2) separately from the OAKS (PeopleSoft) Managed Services and Projects work (contained in Supplements 1 and 3). No other partial award or RFP segmentation considerations shall apply and the State will not evaluate offeror responses that do not comply with RFP instructions regarding Proposal submission.

Offerors may submit separate responses (one each) to the **OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal** and the **OAKS (PeopleSoft) Financial Systems Upgrade Proposal**. Any offeror that submits multiple Proposals for each of these options may have all of its Proposals rejected.

The offeror selected for the OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal will not be required to perform the OAKS (PeopleSoft) Financial Systems Upgrade work should the OAKS (PeopleSoft) Financial Systems Upgrade work be awarded separately to another offeror.

Should the State elect to make a separate award for the **OAKS (PeopleSoft) Financial Systems Upgrade** work, the State will revisit the integrated proposals and pursue an award with the highest ranking **OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal** offeror.

**Mandatory Requirements.** The first table lists this RFP's mandatory requirements. If the offeror's Proposal meets the designated mandatory requirements, the offeror's Proposal may be included in the next part of the technical evaluation phase described in the following table.

Mandatory Requirements	Reject	Accept
<p><b>**The offeror, as the prime contractor, must have provided PeopleSoft Applications Managed Services for HCM and FIN (together as an integrated service) for a period of two concurrent years at some time over the last eight years to at least one of the following: 1) State, Local or Federal Agency with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.</b></p> <p>This requirement is mandatory for offerors that are submitting a:</p> <p style="text-align: center;"><b>OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal</b></p>		
<p><b>**The offeror, as the prime contractor, must have performed and completed a PeopleSoft major systems upgrade project (i.e., version 8.x to 9.x) or implementation project (version 9.x) to a FIN/EPM Suite over the last four years, to at least one State, Local or Federal Agency with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.</b></p> <p>This requirement is mandatory for offerors that are submitting a:</p> <p style="text-align: center;"><b>OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal</b></p> <p>and for offerors submitting a standalone:</p> <p style="text-align: center;"><b>OAKS (PeopleSoft) Financial Systems Upgrade Proposal.</b></p>		

**Scored Criteria.** In the technical evaluation phase, the State will rate the technical merits of the Proposals based on the following requirement areas and the weight assigned to each requirement area.

Managed Services and Projects Requirements (Supplements 1, 3 and 4)					
Scored Criteria	Weight	Does Not Meet	Partially Meets	Meets	Exceeds
<b>Offeror Requirements</b>					
**The offeror, as the prime contractor, must have provided PeopleSoft Applications Managed Services for HCM and FIN (together as an integrated service) for a period of two concurrent years at some time over the last eight years to at least one <b>of the following: 1) State, Local or Federal Agency with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.</b>	40	n/a	2	5	7
Offeror Profile (as it relates to proposed work)	10	0	2	5	7
<b>Proposed Solution</b>					
Proposed Solution. Offeror's response to Supplement 1: OAKS PeopleSoft Projects	75	0	2	5	7
Proposed Solution. Offeror's response to Supplement 3: OAKS Managed Services	100	0	2	5	7
Project Plan for Supplements 1 and 3	50	0	2	5	7
Proposed Solution. Offeror's response to Supplement 4: Security & Privacy as it pertains to the work requirements in Supplements 1 and 3.	25	0		5	
<b>Project Requirements</b>					
Staffing Plan/Key Personnel	100	0	2	5	7

Financial Systems Upgrade Requirements (Supplements 2 and 4)					
Scored Criteria	Weight	Does Not Meet	Partially Meets	Meets	Exceeds
<b>Offeror Requirements</b>					
**The offeror, as the prime contractor, must have performed and completed a PeopleSoft major systems upgrade project (i.e., version 8.x to 9.x) or implementation project (version 9.x) to a <b>FIN/EPM Suite</b> over the last four years, to at least one State, Local or Federal Agency <b>with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.</b>	40	n/a	2	5	7
Offeror Profile (as it relates to proposed work)	30	0	2	5	7

**ATTACHMENT SEVEN  
OFFEROR PROFILE**

**OFFEROR MANDATORY REQUIREMENTS**

**MANDATORY REQUIREMENT:**

**\*\*The offeror, as the prime contractor, must have provided PeopleSoft Applications Managed Services for HCM and FIN (together as an integrated service) for a period of two concurrent years at some time over the last eight years to at least one of the following: 1) State, Local or Federal Agency with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.**

This requirement is mandatory for offerors that are submitting a:

**OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal**

Agency/Company/Higher Ed Name:	<b>Contact Name:</b> (Indicate Primary or Alternate)  <b>Contact Title:</b>
Agency/Company/Higher Ed Address:	<b>Contact Phone Number:</b>  <b>Contact Email Address:</b>
Project Name:	<b>Beginning Date of Expr: / Ending Date of Expr:</b> Month/Year                      Month/Year
PeopleSoft HCM Version:	Number of Employees/Students:
PeopleSoft FIN Version:	Revenue:
<b>Describe Related Service Provided:</b>  <b>Describe how the Related Service shows the offeror’s experience, capability, and capacity to meet the requirements and achieve the milestones for this Project:</b>	

**ATTACHMENT SEVEN – PART 2  
OFFEROR ORGANIZATION OVERVIEW AND PROFILE SUMMARY**

**OFFEROR MANDATORY REQUIREMENTS  
CONTINUED**

**MANDATORY REQUIREMENT:**

\*\*The offeror, as the prime contractor, must have performed and completed a PeopleSoft major systems upgrade project (i.e., version 8.x to 9.x) or implementation project (version 9.x) to a FIN/~~EPM~~ Suite over the last four years, to at least one State, Local or Federal Agency **with at least \$10B in revenues or 10,000 employees; 2) Fortune 500 company of any size; or 3) an Institution of Higher Education with at least 10,000 enrolled students.**

This requirement is mandatory for offerors that are submitting a:

**OAKS (PeopleSoft) Managed Services and Projects – Integrated Proposal**

and for offerors submitting a standalone:

**OAKS (PeopleSoft) Financial Systems Upgrade Proposal.**

<b>Agency/Company/Higher Ed Name:</b>	<b>Contact Name:</b> (Indicate Primary or Alternate)  <b>Contact Title:</b>
<b>Agency/Company/Higher Ed Address:</b>	<b>Contact Phone Number:</b>  <b>Contact Email Address:</b>
<b>Project Name:</b>	<b>Beginning Date of Expr: / Ending Date of Expr:</b> Month/Year                      Month/Year
<b>PeopleSoft FIN Conversion Versions:</b>	<b>Number of Employees or Students:</b>
<b>PeopleSoft FIN Implementation Version:</b>	<b>Revenue:</b>
<b>Describe Related Service Provided:</b>          <b>Describe how the Related Service shows the offeror’s experience, capability, and capacity to meet the requirements and achieve the milestones for this Project:</b>	