

AMENDMENT 2 FOR RFP NUMBER 0A1128

DATE AMENDMENT ISSUED: May 1, 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.

PART ONE: EXECUTIVE SUMMARY

Purpose. This is a Request for Competitive Sealed Proposals (“RFP”) under Sections 125.071 and 125.18 of the Ohio Revised Code (the “Revised Code”) and Section 123:5-1-8 of the Ohio Administrative Code (the “Administrative Code”). The Office of Information Technology has asked the Department of Administrative Services to solicit competitive sealed proposals (“Proposals”) for the provision of PeopleSoft Managed Services (the “Managed Services”), and PeopleSoft Projects and Support Services (the “Projects”) (together comprising the “Work”), and this RFP is the result of that request.

If a suitable offer is made in response to this RFP, the State of Ohio (the “State”), through the Office of Information Technology, may enter into a contract (the “Contract”) to have the selected offeror (the “Contractor”) perform all or part of the Work. This RFP provides details on what is required to submit a Proposal for the Work, how the State will evaluate the Proposals, and what will be required of the Contractor in performing the Work.

This RFP also gives the estimated dates for the various events in the submission process, selection process, and performance of the Work. While these dates are subject to change, prospective offerors must be prepared to meet them as they currently stand.

****Once awarded, the term of the Contract will be from the award date until the Work is completed to the satisfaction of the State and the Contractor is paid or June 30, 2015, whichever is sooner. The State may renew this Contract for up to two additional two-year biennium terms plus two additional **annual biennium** options to allow for transition at contract end, subject to and contingent on the discretionary decision of the Ohio General Assembly to appropriate funds for this Contract in each new biennium. Any such renewal of all or part of the Contract also is subject to the satisfactory performance of the Contractor and the needs of OIT. The maximum term of the Contract, including all optional renewals, will be from the award date through June 30, **2023 2024**.****

The State may reject any Proposal if the offeror fails to meet a deadline in the submission or evaluation phases of the selection process or objects to the dates for performance of the Work or the terms and conditions in this RFP.

Background. The State has made a significant investment in developing and deploying a PeopleSoft application suite, including Finance (FIN), Human Capital Management (HCM), Enterprise Performance Management (EPM), Enterprise Learning Management (ELM), Customer Relationship Management (CRM) and Portal that is known collectively as The Ohio Administrative Knowledge System (OAKS).

The deployment of this suite was completed in July 2008. It has been supported operationally by an OAKS Managed Services Vendor (MSV) since February of 2009 and governed by a Statement of Work including SLAs, in which the MSV is ultimately responsible for the ongoing management and performance of these applications.

The high level goals of the OAKS Managed Services are to:

- Increase service levels and systems quality as well as quality and timeliness of operations;
- Access best practices and lower cost of operations to help the State achieve a higher level of operational and cost efficiency;
- Create repeatable and predictable processes;
- Increase access to centralized financial data;
- Eliminate work/rework cycles as a result of manual efforts;
- Increase control over key business processes;
- Streamline operations;
- Reduce exposure to risk;
- Improve overall control over critical financial, HR and procurement functions (e.g., GL, AP, Billing / AR and Fixed Asset Accounting, Compensation, Benefits, Talent Management, Sourcing etc.);
- Support the implementation and operation of on-going business process transformation activities;
- Position the State to scale operations in a cost-effective manner; and
- Increase the degree of system integration and automation.

The State has some immediate needs as well as longer term requirements for the performance and implementation of certain OAKS Projects that arise from time to time. The State has invested significant capital and operating expense in the creation and ongoing operation of OAKS since it was conceived in early 2001. As a

Each Proposal must contain the following ***tabbed sections in the in-line response***:

Technical Proposal (Applies to All Responses unless noted)

- Cover Letter
- Vendor Information Form (OBM-5657)
- Subcontractor Letters
- Offeror Certification Form
- MBE Certification
- Offeror Profile (as it relates to the proposed work)
- Proposed Solution
 - Supplement 1 Response (Applies to Integrated Response Only)
 - Supplement 2 Response (Applies to Integrated and FIN Upgrade Responses)
 - Supplement 3 Response (Applies to Integrated Response Only)
 - Supplement 4 Acceptance and Compliance Response (Applies to All Responses)
- Staffing Plan and Time Commitment
- Assumptions
- Project Plans – Microsoft Project as required by Supplements 1, 2 and 3
- Support Requirements
- Pre-Existing Materials
- Commercial Materials
- ~~**Conflict of Interest Statement**~~
- Proof of Insurance
- Payment Address
- Legal Notice Address
- W-9 Form
- Independent Contractor Acknowledgement
- Standard Affirmation and Disclosure Form (EO 2011-12K)
- Attachment 4: General Terms and Conditions Acceptance

Cost Proposal

Cost Summary - Microsoft Excel workbook (must be separately sealed, in native Excel format – not PDF)

Cover Letter. The cover letter must be in the form of a standard business letter and must be signed by an individual authorized to legally bind the offeror. The cover letter must include a brief executive summary of the solution the offeror plans to provide. The letter must also have the following:

- a. A statement regarding the offeror's legal structure (e.g., an Ohio corporation), Federal tax identification number, and principal place of business;
- b. A list of the people who prepared the Proposal, including their titles; and
- c. A statement certifying the Contractor is a business entity and will not submit the Independent Contractor/Worker Acknowledgement to the ordering agency.

Vendor Information Form. The offeror must submit a signed and completed Vendor Information Form (OBM-5657). The form is available at <http://ohiosharedservices.ohio.gov/VendorsForms.aspx> in the Vendor Forms section.

Subcontractor Letters. For each proposed subcontractor, the offeror must attach a letter from the subcontractor, signed by someone authorized to legally bind the subcontractor, with the following included in the letter:

- 1. The subcontractor's legal status, federal tax identification number, D-U-N-S number, and principal place of business address;
- 2. The name, phone number, fax number, email address, and mailing address of a person who is authorized to legally bind the subcontractor to contractual obligations;