Request for Proposal: Human Resource/Payroll Management Information System

RFP Reference Number – UW-12-0149RKH

Bidders Conference
October 3, 2012, 12:00-2:00 PM PT
Agenda

- Introductions & Overview
- Opening Remarks
- Preparing for the Future
- Procurement Overview
- Q&A
Introductions & Overview

Mark Conley, Director, Procurement Services
Presenters

- V’Ella Warren, Senior Vice President
- Lisa Yeager, HR/Payroll Program Director
- Jessica Allen, Senior Project Manager, HR/Payroll Procurement
Conference Overview

- Quiet cell phones
- Hour long presentation, followed by 1 hour of Q&A
  - In person participants – hold questions until end
  - Adobe Connect participants – use chat to submit questions
- List of attendees (in person & via web/teleconference) to be published on WEBS within 24 hours
- Focus on general questions related to bidder instructions, procurement stages, etc.
- Verbal responses to questions are non-binding
“Discovery and innovation is at the heart of our university”

Opening Remarks
V’Ella Warren, Senior Vice President
UW students win NASA contest with their plan for mining the moon

UW receives more federal research funding than any other American public university

UW physicists played significant role in discovery of Higgs boson

UW second in nation in Peace Corps volunteers

UW Department of Global Health center chosen to lead AIDS education and training
Transforming & Positioning UW for the 21st Century

- UW: A $4.6 billion global enterprise and third largest employer in state
- Operating on 30 year old payroll system
- Benefits of new system for UW
  - Modern technology infrastructure
  - Efficiencies in productivity
  - Improved levels of service
  - Reliable data for decision-making and maintaining compliance.
Transforming & Positioning UW for the 21st Century

- Highest level of UW leadership committed to success of project
  - Transformational
  - Strategic investment

- Business process redesign already in process

- Unique opportunity to build long-term partnership with UW
  - First step of Strategic Roadmap
Preparing for the Future
Lisa Yeager, HR/Payroll Program Director
Strategic Roadmap

UW Mission

Enterprise Information Management

Research
Admin Systems

Research
Admin Systems

Financial Systems

Student
Admin Systems

HR/Payroll Systems

Clinical
Admin Systems

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UW HRP Procurement Bidders Conference
Key Decisions

- Solution: Broad in scope
- Delivery: Hosted or SaaS
- Single accountability
  - One contract
  - One Prime Bidder
- Process designed to secure best solution and partner
- Start preparing for the new system now
  - Business process redesign
  - Communications and change management
  - Reduce complexity of current systems
Business Process Redesign Project

- Peer research – Start early on business process redesign (BPR)
- Started August 2012
- Planned completion April 2013
- Accenture hired to:
  - Assist UW to design desired future state; software agnostic
  - Develop change management and communications plan
Change Management & Communications Scope

- Sponsorship Action Plan
- Stakeholder Analysis & Action Plan
- Change Network
- Communications Plan
- Change Plan
- Next Steps
Procurement Overview

Jessica Allen, Senior Project Manager – HR/Payroll
Procurement
Request for Proposal

- Outcome of 2010-2011 Feasibility Study
- Consulted with peers and other expert resources
- Developed in house by UW staff; involving:
  - Executive Sponsors
  - HR/Payroll Business Process Owners Core Team
  - Subject Matter Experts
  - HR/Payroll Project Team
  - Procurement Services & AG’s Office
Procurement Goals

- Fair, open and competitive procurement process
  - Public institution – subject to state procurement rules and regulations

- Select solution that is in the best long-term interest of UW (in no particular order of importance)
  - Size and scale
  - Functionality
  - Architectural fit
  - Cost
  - Risk
  - Strategic partnership and commitment
Staged Procurement Approach

- Process designed to secure best solution and partner
  - Reduce risk for both UW and partner
    - Focus discussions on key requirements and issues
  - Build relationships for long-term partnership
  - Bidders at table with UW to collaboratively:
    - Refine scope
    - Plan and solidify phasing for implementation
    - Build comprehensive project documents, including SOW, project plan and resource plan
  - Lay strong foundation for implementation and on-going maintenance and support
Bidders Response: Key Elements by Stage

**Stage 1**
1. Mandatory Requirements Responses
2. Mission Critical Responses
3. Certify Compliance with UW Negotiation Procedures

**Stage 2**
1. Bidder Proposals
   1. Functional
   2. Technical
   3. Bidder Profile
2. Detailed Requirements Fit/Gap
3. Key Business Terms Responses
4. Key Terms Negotiations

**Stage 3**
1. System Demonstrations
2. Response to Stage 3 Questions
3. Cost Proposal
4. Contract Issues List
5. Contract Negotiations

**Stage 4**
1. System Demos
2. Responses to Additional Questions
3. Implementation Planning Sessions
4. Revised Cost Proposal
5. Final Contract Negotiations
6. Finalize contract
7. Bidder Signs Contract

**Final Approvals**
- Secure BOR Approvals
- Secure State Approvals
- Finalize Funding
- UW Signs Contract
- Contract Fully Executed
Stage 1: Mandatory and Mission Critical Responses

- Mandatory Requirements:
  - Minimum of 20,000 employees per pay period
  - Prime Bidder: Single accountability for all performance
  - Delivery: Hosted or SaaS

Failure to meet Mandatory requirements will disqualify bidder from further consideration

No limit to the number of bidders moving to Stage 2
Stage 1: Mandatory and Mission Critical Responses

- Bidders selected to participate in Stage 2 will receive:
  - System Demonstration Materials (for Stage 3)
  - UW Key Business Terms Document
    - More detail on Key Partnering and Solution Commitments (RFP Section 3.22)

Stage 1
Bidders submit Mandatory and Mission Critical responses; Certify compliance with UW Negotiation Procedures

Failure to meet Mandatory requirements will disqualify bidder from further consideration

No limit to the number of bidders moving to Stage 2

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Stage 2: Questions, Components, Detailed Requirements, and Key Business Terms

- Stage 2 requires bidders to:
  - Respond to functional, technical, and other profile questions
  - Complete Detailed Business Requirements Matrix
  - Respond to Key Business Terms Document and reach agreement with UW

Up to 4 bidders selected for Stage 3
Stage 2: Questions, Components, Detailed Requirements, and Key Business Terms

- Bidders selected to participate in Stage 3 will receive:
  - Updated System Demonstration Materials
  - Cost Proposal instructions, materials and pricing spreadsheets
  - UW Contract and Project Documents
    - Master Technology Agreement
    - HR/Payroll Project Agreement
    - Statement of Work
    - Hosting or SaaS Services terms and conditions
Stage 3: Solution Demonstrations, Cost Proposals, and Contract and Project Documents

- Stage 3 requires bidders to:
  - Submit list of Non-Supported Requirements in advance of demonstrations
  - Conduct system demonstrations
  - Respond to Stage 3 questions
  - Submit Cost Proposal
  - Submit Contract Issues List
  - Participate in Contract Issues negotiations, if requested

Top 2 finalists selected
Stage 3: Solution Demonstrations, Cost Proposals, and Contract and Project Documents

- Bidders selected to participate in Stage 4 will receive:
  - Implementation Planning Study (IPS) schedule
  - Additional questions requiring written response
  - Guidance and priorities for additional system demonstrations

Bidders conduct scripted demos, respond to Stage 3 questions, submit cost proposals and contract issues list; contract negotiations

Top 2 finalists selected
Stage 4: Finalist Bidders, Implementation Planning Study, and Contract Negotiations

- Stage 4 requires bidders to:
  - Conduct additional system demonstrations
  - Respond to additional questions, as needed
  - Participate in IPS workshops, to finalize the project documents, including SOW, project plan & resource plan
  - Submit revised Cost Proposal
  - Conduct final negotiations
  - Sign contract
Seek State and Board of Regents Approval

- **Fall 2013**
  - Recommendation to Board of Regents
  - If approved, submission to State

**Final Approvals**

- Secure BOR Approvals
- Secure State Approvals
- Finalize Funding
- UW Signs Contract
- Contract Fully Executed
Procurement Stages Recap

- **Goal:** Make the most effective use of all parties’ time; build a solid foundation for HR-Payroll solution implementation
  - All interested parties who fulfill the mandatory requirements are encouraged to submit a Stage 1 response
  - Stage 2 requires significantly more effort and detail in addressing specific features, functions and requirements.
  - Stage 3 demonstrations, cost proposals, and contract issues list
  - Stage 4 finalists participate in development of project plans, schedules, resource requirements, negotiation of final terms and conditions, and final pricing
Submission Reminders

- Bidders acting as a Prime Bidder are limited to submitting one proposal
- A single vendor may be included as a subcontractor with more than one Prime Bidder
- Only one contract will be entered into between UW and the successful Prime Bidder
Submission Reminders

- Proposals must be submitted using Decision Director, a web-based collaboration tool provided by Advantiv Solutions LLC
- No sales literature or other pre-printed materials
- Limit contact to UW’s RFP Coordinator, Ray Hsu
Bidder Requests for Clarification

- Must be submitted using Advantiv Decision Director
- UW to prioritize questions and issue responses; priorities for Stage 1:
  - Bidder instructions and submission questions
  - Procurement rules
  - Stage 1 questions will be responded to
- Responses to be posted to WEBS as RFP addenda
Stage 1 Key Dates

- **October 9, 2012, 5:00 PM Pacific**
  - Stage 1 Request for Clarifications Due
    - Submit through Advantiv Decision Director

- **October 16, 2012**
  - UW Responses to Stage 1 Related Question

- **October 26, 2012, 5:00 PM Pacific**
  - Stage 1 Proposals must be completed in Advantiv
Questions & Answers

Moderator: Mark Conley, Director, Procurement Services
Q&A

- Verbal responses to questions are unofficial
- Official responses to be posted on WEBS as RFP addenda
- When asking a question, please identify your name and company
- We will take questions via Adobe Connect
- For questions that we do not get to today, please submit using Advantiv Decision Director
Summary

Mark Conley, Director, Procurement Services
Procurement Stages Recap

- UW’s goal is to make the most effective use of all parties’ time and develop a solid foundation on which to implement the HR/Payroll solution
  - All interested parties who fulfill the mandatory requirements are encouraged to submit a Stage 1 response
  - Stage 2 – requires significantly more effort and detail in addressing specific features, functions and requirements
  - Stage 3 – basis for selecting finalists
  - Stage 4 – finalists participate in development of project plans, schedules, resource requirements, and negotiation of final terms and conditions and any revised pricing

- Thank you for attending