

REQUEST FOR QUOTATIONS (RFQ) (THIS IS NOT AN ORDER)			PAGE OF 1	PAGES 17	
1. RFQ NO. RQ365342	2. DATE ISSUED September 6, 2007	3. REQUISITION NO. RQ365342	4. TYPE OF MARKET X Open _ Set Aside _ Open with Subcontracting Set Aside		
5A. ISSUED BY:  Government of the District of Columbia (District) Office of Contracting and Procurement Information Technology Group 441 4 <sup>th</sup> Street N.W., Suite 971 North Washington, D.C. 20001			6. DELIVERY Immediately upon notification of contract award.		
5B. FOR INFORMATION CALL: (Name and telephone no.) (No collect calls) Shelvia Armstrong, Contract Specialist, Phone (202) 7274-5178, fax (202) 727-1679 <a href="mailto:Shelvia.Armstrong@dc.gov">Shelvia.Armstrong@dc.gov</a> Steven Wishod, Contracting Officer, Phone (202) 727-8983 <a href="mailto:Steven.wishod@dc.gov">Steven.wishod@dc.gov</a>			7. DELIVERY METHOD <input checked="" type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER (See Schedule)		
8A. TO: NAME AND ADDRESS, INCLUDING ZIP CODE, OF QUOTER  <b>ALL Perspective Bidders</b>  <b>NIGP Commodity Code 918-29-00</b>			9. DESTINATION FOR DELIVERY OF GOODS OR SERVICES ORDERED  Office of the Chief Technology Officer 441 4 <sup>th</sup> Street, NW, Suite 1045N Washington, DC 20001 Attn: Mahamudul Huda		
8B. TAX ID NO. OF QUOTER:					
10. PLEASE FURNISH QUOTATIONS ON OR BEFORE:  September 21, 2007 2:00 PM		11A. PLEASE STATE YOUR LSDBE CERTIFICATION NUMBER BELOW (Attach Copy)			
		11B. IF YOU HAVE A DISTRICT OF COLUMBIA SUPPLY SCHEDULE (DCSS) CONTRACT FOR THESE ITEMS, PLEASE ENTER THE CONTRACT NUMBER BELOW:			
<b>12. INSTRUCTIONS TO QUOTERS AND TERMS AND CONDITIONS</b>					
<b>Instructions to Quoters:</b> Please complete Blocks 8B, 11A, 11(B) if applicable, 13(E), 13(F), 14, 15, 16, 17, 18, as well as submission of technical and price proposals as outlined in this solicitation, submit one (1) original and four (4) copies of signed quotations to Office of Contracting and Procurement, 441 4 <sup>th</sup> Street, NW, Suite 703 (Bid Room), Washington, D.C. 20001. This is the <u>only</u> authorized method of submitting a quotation for this RFQ. All quotations must be received no later than the date and time stated in block 10 of this RFQ.					
<b>Terms and Conditions:</b> SEE ATTACHED.					
<b>13. SCHEDULE (Include applicable Federal, State and local taxes and all delivery charges)</b>					
ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<b>See attached (A) Statement of Work</b>				
0001	Base Period – ERP Project Manager	1,500	Hours	\$	\$
1001	Option Period One (1) - ERP Project Manager	1,500	Hours	\$	\$
2001	Option Period Two (2) - ERP Project Manager	1,500	Hours	\$	\$
TOTAL AMOUNT					\$
14. NAME AND ADDRESS OF QUOTER (Street, city, county, State and ZIP Code)			15. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION (ELECTRONIC SIGNATURES <b>NOT</b> ACCEPTABLE)		16. DATE OF QUOTATION
			17. NAME AND TITLE OF SIGNER (Type or print)		18. TELEPHONE NO. (Include area code)

## **GENERAL TERMS AND CONDITIONS**

This is a Request For Quotations (RFQ) issued under the small purchase procedures outlined in Title 27, District of Columbia Municipal Regulations, Chapter 18, Section 1802.3. The terms Quote/Quoter and Offer/Offeror are used interchangeably in this RFQ, as are the terms RFQ and solicitation, and the terms submission, quote and proposal, and the terms contract and Purchase Order (PO). Quotations submitted are Offers that the District can accept by issuing a PO. The District will apply preferences in evaluating submissions from District-certified LSDBEs. If you are unable to submit a quote, please so indicate on this form and return it.

### **2. PERIOD OF PERFORMANCE AND CONTRACT TYPE**

The contract awarded from this solicitation will be a labor hour contract. The period of performance for the base period will be 1,500 hours from date of award, with the option to renew four (2) additional option periods of 1,500 hours each, or successive fractions thereof, by written notice to the Contractor before the expiration of the contract; provided that the District will give the Contractor a preliminary written notice of its intent to extend at least thirty (30) days before the contract expires. The preliminary notice does not commit the District to an extension. The exercise of this option is subject to the availability of funds at the time of the exercise of this option. The Contractor may waive the thirty (30) day preliminary notice requirement by providing a written waiver to the Contracting Officer prior to expiration of the contract. The quoter/offeror shall submit a price for the base period and each option period. If the District exercises this option, the extended contract shall be considered to include this option provision. The price for the option period shall be as specified in the contract. The total duration of this contract, including the exercise of any options under this clause, shall not exceed twenty-four (24) months.

### **3. CONTRACT AWARD**

The District may award a single contract or multiple contracts resulting from this solicitation to the responsible offeror(s) whose offer(s) conforming to the solicitation will be most advantageous to the District, cost or price, technical and other factors specified elsewhere in this solicitation

### **4. INITIAL OFFERS**

The District may award contracts on the basis of initial offers received, without discussion. Therefore, each initial offer should contain the Offeror's best terms from a standpoint of cost or price, technical and other factors.

### **5. CONTRACTING OFFICER (CO)**

Contracts will be entered into and signed on behalf of the District, or Purchase Orders issued on behalf of the District, only by contracting officers. The name, address and telephone number of the Contracting Officer is:

-Steven H. Wishod, CPPB  
Contracting Officer  
Government of the District of Columbia  
Office of Contracting and Procurement  
Information Technology Group  
441 Fourth St., NW, Suite 971 North  
Washington, DC 20001  
Phone: (202) 727-0252 (main)  
Phone: (202) 727-8983 (direct)  
Fax: (202) 727-1679  
E-mail: [steven.wishod@dc.gov](mailto:steven.wishod@dc.gov)  
Website: ocp.dc.gov

**6. AUTHORIZED CHANGES BY THE CONTRACTING OFFICER**

The Contracting Officer is the only person authorized to approve changes in any of the requirements of this contract. The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of this contract, unless issued in writing and signed by the Contracting Officer, or a valid changed PO is issued by the Contracting Officer. In the event the Contractor effects any change at the instruction or request of any person other than the Contracting Officer, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

**7. CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)**

The COTR is responsible for general administration of the contract and advising the Contracting Officer as to the Contractor's compliance or noncompliance with the contract. In addition, the COTR is responsible for the day-to-day monitoring and supervision of the contract, of ensuring that the work conforms to the requirements of this contract and such other responsibilities and authorities as may be specified in the contract. The COTR for this contract shall be designated upon award of the contract. The COTR shall not have authority to make any changes in the specifications or scope of work or terms and conditions of the contract. The Contractor may be held fully responsible for any changes not authorized in advance, in writing, by the Contracting Officer; may be denied compensation or other relief for any additional work performed that is not so authorized; and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

**8. ADVISORY AND ASSISTANCE SERVICES**

The contract is a "nonpersonal services contract". It is therefore, understood and agreed that the Contractor and/or the Contractor's employees: (1) shall

perform the services specified herein as independent Contractors, not as employees of the government; (2) shall be responsible for their own management and administration of the work required to bear sole responsibility for complying with any and all technical, schedule, financial requirements or constraints attendant to the performance of this contract; (3) shall be free from supervision or control by any government employee with respect to the manner or method of performance of the service specified; but (4) shall, pursuant to the government's right and obligation to inspect, accept or reject work, comply with such general direction of the CO, or the duly authorized representative of the CO as is necessary to ensure accomplishment of the contract objectives.

## 9. **CONTRACT DELIVERY REQUIREMENTS**

- 9.1 The Contractor shall follow the procedures and rules of the Government of the District of Columbia, and additional instructions that the District COTR may direct. During performance under this contract and/or at completion of work, the Contractor shall provide orderly hand-over of work products and deliverables to the District COTR, including all documentation, electronic or otherwise, created during performance of the contract. All work product produced under the contract is at all times the property of the District.
- 9.2 In addition, the Contractor shall:
  - 9.2.1 Ensure that all work is performed on District premises, unless otherwise approved in writing by the COTR;
  - 9.2.2 Plan, direct and coordinate the transition team that completes the installation of the PeopleSoft HCM Information System within prescribed time frames and funding parameters. This will include to manage periodic tax update processing, year end processing, W-2 processing and deployment of e-pay, and e-time modules.
  - 9.2.3 Ensure that project goals are accomplished and in line with business objectives.
  - 9.2.4 Manage the team that develops and carries out the project
  - 9.2.5 Monitor project activities and ensure the currency, quality, and integrity of the information, while providing consistency in content and "look and feel" across the enterprise.
  - 9.2.6 Work closely with the assigned user community (and through business technologists) to determine how technology might assist in addressing its needs, and then translates these needs into system requirements and design specifications.
  - 9.2.7 Understand how to leverage applications for competitive advantage
  - 9.2.8 Manage a dynamic team of individuals who constantly search for creative ways to elevate the capabilities of technology systems to meet business needs, partly by capitalizing on emerging technologies and partly by adapting technologies to the needs of the customer.
  - 9.2.9 Review project proposals or plans to determine time frame, funding limitations, procedures for accomplishing projects, staffing requirements and allotment of available departmental resources to various project phases.
  - 9.2.10. Establish work plan and staffing for each phase of projects, and arrange for recruitment or

- assignment of project personnel.
- 9.2.11. Confer with project staff to outline work plan.
  - 9.2.12. Formulate and define technical scope and objectives of projects.
  - 9.2.13. Identify and schedule project deliverables, milestones and required tasks.
  - 9.2.14. Assign duties, responsibilities and scope of authority to project personnel.
  - 9.2.15. Direct and coordinate activities of project personnel to ensure project progresses on schedule and within budget.
  - 9.2.16. Review status reports prepared by project personnel, and modify schedules or plans as required.
  - 9.2.17. Establish standards and procedures for project reporting and documentation.
  - 9.2.18. Prepare project reports for management, clients or others.
  - 9.2.19. Confer with project personnel to provide technical advice and to resolve problems.
  - 9.2.20. Coordinate project activities with activities of business units.
  - 9.2.21. Coordinate and respond to requests for changes from original specifications.
  - 9.2.22. Identify project risk factors and develop risk mitigation strategy.
  - 9.2.23. Develop quality assurance test plans.
  - 9.2.24. Direct quality assurance testing.
  - 9.2.25. Ensure easy access to information that is useful to users.
  - 9.2.26. Keep close, direct contact with key end-user representatives to ensure technologies are providing valuable information-sharing capabilities to customers.
  - 9.2.27. Manage internal and external systems/application development projects within assigned areas from inception to successful implementation:
    - i. Define project objectives, scope and level of effort.
    - ii. Develop project strategies and plans, and identify the methods and tools required for the project.
    - iii. Get projects off the ground, keep them on track and on budget, and resolve issues with customers.
    - iv. Monitor progress against plan.
  - 9.2.28. Work closely with end users, business technologists and others to understand and prioritize business goals and information needs, and then develop system requirements and design specifications; direct efforts to refine conceptual systems design requirements into the technical design.
  - 9.2.29. Provide leadership and motivation to project team members throughout the project life cycle.
  - 9.2.30. Lead the effort in creative approaches to problem solving and quality deliverables supporting business needs.
  - 9.2.31. Provide sufficient support after submission of deliverables and work products, as necessary to clarify the contents of deliverables to the District.
  - 9.2.32. Prepare and present weekly reports, throughout the performance of the Contractor's work, setting out current and upcoming activities, decisions required and issues of concern.
  - 9.2.33. Provide reporting and communications in copies and form requested by the designated District representative.

## **8. HIRING OF EMPLOYEES**

By accepting this order or contract, the Contractor agrees that the District, at its discretion, after completion of order or contract period, may hire the

individual performing services as a result of this order or contract, without restriction, penalties or fees.

## 9. INVOICE PAYMENT

The District will make payments to the Contractor, upon the submission of proper invoices, at the prices stipulated in this contract, for supplies delivered and accepted or services performed and accepted, less any discounts, allowances or adjustments provided for in this contract. The District will pay the Contractor on or before the 30<sup>th</sup> day after receiving a proper invoice from the Contractor. The Contractor shall submit proper invoices no later on a monthly basis or as otherwise specified in the order or by the COTR. Invoices shall be prepared in duplicate and submitted to the agency Chief Financial Officer (CFO) with concurrent copies to the Contracting Officer's Technical Representative (COTR) specified in this solicitation. The address of the CFO is:

**Name:** OCTO Agency CFO  
Accounts Payable Division  
**Address:** 441 4<sup>th</sup> Street, NW  
Suite 930S  
Washington, D.C. 20001  
**Telephone:** (202) 727-2277  
**Fax:** 202-727-1216  
**E-mail:** [octo.accountspayable@dc.gov](mailto:octo.accountspayable@dc.gov)

To constitute a proper invoice, the Contractor shall submit the following information:

- (a) Contractor's name and invoice date (Contractors are encouraged to date invoices as close to the date of mailing or transmittal as possible.);
- (b) Contract number and Encumbrance Code (PO Number). Assignment of an invoice number by the Contractor is also recommended;
- (c) Description, price, quantity, dates and the percent (%) of work actually performed;
- (d) The original and two (2) copies of invoices for cost reimbursable expenses, if authorized by the contract;
- (e) Other supporting documentation or information, as required by the Contracting Officer;
- (f) Name, title, telephone number and complete mailing address of the responsible official to whom payment is to be sent;
- (g) Name, title, phone number of person preparing the invoice;

(h) Name, title, phone number and mailing address of person; and authorized signature.

(i) Monthly bills must be broken down by rate, person, hours, and task as an attachment to each bill, with approved District timesheets.

## 10. EVALUATION FACTORS

10.1 The District intends, but is not obligated, to make a single award to the responsible Quoter whose quote is most advantageous to the District, based upon the evaluation criteria specified in the solicitation. Thus, while the points in the evaluation criteria indicate their relative importance, the total scores will not necessarily be determinative of the award. Rather, the total scores will guide the District in making an intelligent award decision based upon the evaluation criteria. The Technical Rating Scale is as follows:

<u>Numeric Rating</u>	<u>Adjective</u>	<u>Description</u>
0	Unacceptable	Fails to meet minimum requirements; <i>e.g.</i> , no demonstrated capacity, major deficiencies which are not correctable; offeror did not address the factor.
1	Poor	Marginally meets minimum requirements; major deficiencies which may be correctable.
2	Minimally Acceptable	Marginally meets minimum requirements; minor deficiencies which may be correctable.
3	Acceptable	Meets requirements; no deficiencies.
4	Good	Meets requirements and exceeds some requirements; no deficiencies.
5	Excellent	Exceeds most, if not all requirements; no deficiencies.

For example, if a sub factor has a point evaluation of 0 to 6 points, and (using the Technical Rating Scale) the District evaluates as "good" the part of the proposal applicable to the sub factor, the score for the sub factor is 4.8 (4/5 of 6). The sub factor scores will be added together to determine the score for the factor level.

## 10.2 MINIMUM REQUIREMENTS

**(a). The contractor shall be a citizen or permanent resident of the United States of America. This requirement will not count toward the technical evaluation of the candidate, but failure to comply with this requirement will result in an automatic disqualification:**

**(b). Prospective vendors are to submit a resume with the candidates name and one without the name. Resume are not to have company logos or any identifying marks of the company/organization. Three (3) references shall be included on the resume. Failure to submit as instructed will result in the résumé(s) not being evaluated.**

**(c). As a response to this RFQ, the contractor shall provide no more than one (1) resume as part of the response to this RFQ. In addition, no resume shall be longer than three (3) pages in length. Each resume shall be submitted with identical font and formatting. Failure to comply with this requirement will result in an automatic disqualification.**

(The selected contractor shall provide one and only one resource that meets the following requirements in order to be considered for the position)

(d). Bachelor' s Degree in Computer Science, Information Systems, Public Administration, Business Administration, or other related field. Master' s Degree preferred.

(e). 10+ year of government business experience.

(f). 7+ years of implementation Project Management experience managing a variety of important, midsize to large technology project.

(g). 5+years of technical management experience in a dynamic high-technology environment.

(h). 3+ years of business-unit experience with sensitivity and commitment to business problem solving.

(i). 3+ years of experience managing the technical delivery of PeopleSoft HCM (i, e HR, Benefit Administration, Time/Labor and Payroll) system installation, configuration and deployment, preferably the federal government version 8.8 SP1 MP4.

### 10.3 **TECHNICAL CRITERIA** (70 points)

#### 10.3.1 **KNOWLEDGE AND EXPERIENCE**(35 Points)

(a). Experience in project management; Project Management Institute (PMI) certification preferred;

(b). Knowledge of full life cycle software development and software management skills.

(c). 7 years of verifiable SDLC experience and project management experience with at least 3 years of which have been with a government agency.

(d). 3 or more years of experience customizing and installing the PeopleSoft HCM system,

preferably the federal government version.

**10.3.2 ANALYTICAL AND PROBLEM SOLVING SKILLS, AND COMMUNICATION SKILLS (10 points.** points in this category will be awarded based on evaluation of the offeror's proposed resource that successfully completes an interview with a designated District interview panel. Proposed resources will only be asked to complete an interview if all of the minimum requirements specified in section 10. 2 are fulfilled.

**10.3.3 PAST PERFORMANCE OF CANDIDATE (15 points)**

Please provide name, title and current phone number or e-mail address of at least three (3) references that can address each proposed candidates' past performance providing similar services, including an examination of the quality of services provided, timeliness in service delivery, business practices, and overall satisfaction of the candidate's performance.

**10.3.4 PAST PERFORMANCE OF OFFEROR (10 points)**

Please provide name, title and current phone number or e-mail address of at least three (3) references that can address the Offeror's past performance in providing quality candidates for similar services, as well as an examination of the quality of services provided, timeliness in service delivery, business practices, and overall satisfaction of the Offeror's performance. Offerors who have no relevant past performance will receive a neutral score (*i.e.* 5 out of 10).

**10.4 PRICE CRITERIA (30 Points)**

The price evaluation will be objective. The Offeror with the lowest price will receive the maximum price points. All other proposals will receive a proportionately lower total score. The following formula will be used to determine each Offeror's evaluated price score:

$$\begin{array}{l} \text{Lowest price proposal} \\ \text{-----} \end{array} \times 30 = \text{Evaluated price score}$$

Price of proposal being evaluated

The District will evaluate offers for award purposes by evaluating the total price for all options as well as the base period. Evaluation of options shall not obligate the District to exercise them. The District's requirements may change during the option years. Quantities to be awarded will be determined at the time each option is

exercised.

**10.5 PREFERENCE POINTS (12 Points)**

**10.6 TOTAL (112 Points)**

**11.0 PREFERENCES FOR LOCAL BUSINESSES, DISADVANTAGED BUSINESSES, RESIDENT-OWNED BUSINESSES, SMALL BUSINESSES, LONGTIME RESIDENT BUSINESSES, OR LOCAL BUSINESSES WITH PRINCIPAL OFFICES LOCATED IN AN ENTERPRISE ZONE**

Under the provisions of the “Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005” (the Act), Title II, Subtitle N, of the “Fiscal Year 2006 Budget Support Act of 2005”, D.C. Law 16-33, effective October 20, 2005, as amended, the District shall apply preferences in evaluating bids or proposals from businesses that are small, local, disadvantaged, resident-owned, longtime resident, or local with a principal office located in an enterprise zone of the District of Columbia.

**11.1 GENERAL PREFERENCES**

**For evaluation purposes, the allowable preferences under the Act for this procurement are as follows:**

**11.1.1** The addition of three points on a 100 point scale for a small business enterprise (SBE) certified by the Small and Local Business Opportunity Commission (SLBOC) or the Department of Small and Local Business Development (DSLBD), as applicable;

**11.1.2** The addition of five points on a 100 point scale for a resident-owned business enterprise (ROB) certified by the SLBOC or the DSLBD, as applicable;

**11.1.3** The addition of ten points on a 100 point scale for a longtime resident business (LRB) certified by the SLBOC or the DSLBD, as applicable;

**11.1.4** The addition of two points on a 100-point scale for a local business enterprise (LBE) certified by the SLBOC or the DSLBD, as applicable;

**11.1.5** The addition of two points on a 100-point scale for a local business enterprise with its principal office located in an enterprise zone (DZE) and certified by the SLBOC or the DSLBD, as applicable; and

**11.1.6** The addition of two points on a 100-point scale for a disadvantaged business enterprise (DBE) certified by the SLBOC or the DSLBD, as applicable.

**11.2 MAXIMUM PREFERENCE AWARDED**

Notwithstanding the availability of the preceding preferences, the maximum total preference to which a certified business enterprise is entitled under the Act for this procurement is twelve (12) points on a 100 point scale for submissions in response to this RFQ.

### **11.3 PREFERENCES FOR CERTIFIED JOINT VENTURES**

When the SLBOC or the DSLBD, as applicable, certifies a joint venture, the certified joint venture will receive preferences as a prime Contractor for categories in which the joint venture and the certified joint venture partner are certified, subject to the maximum preference limitation set forth in the preceding paragraph.

### **11.4 VENDOR SUBMISSION FOR PREFERENCES**

**11.4.1** Any vendor seeking to receive preferences on this solicitation must submit at the time of, and as part of its bid or proposal, the following documentation, as applicable to the preference being sought:

**11.4.1.1** Evidence of the vendor's or joint venture's certification by the SLBOC as an SBE, LBE, DBE, DZE, LRB, or RBO, to include a copy of all relevant letters of certification from the SLBOC; or

**11.4.1.2** Evidence of the vendor's or joint venture's provisional certification by the DSLBD as an SBE, LBE, DBE, DZE, LRB, or RBO, to include a copy of the provisional certification from the DSLBD.

**11.4.2** Any vendor seeking certification or provisional certification in order to receive preferences under this solicitation should contact the:

Department of Small and Local Business Development  
ATTN: LSDBE Certification Program  
441 Fourth Street, N.W., Suite 970N  
Washington, DC 20001

**11.4.3** All vendors are encouraged to contact the DSLBD at (202) 727-3900 if additional information is required on certification procedures and requirements.

## **12. ATTACHMENTS**

Statement of Work (**Attachment A**)  
Tax Certification Affidavit (**Attachment B**)  
Sample Resume' (**Attachment C**)  
Contractor Past Performance Evaluation (**Attachment D**)

### 13. INSTRUCTIONS

- 13.1 Please submit one (1) original and four (4) copies of both the signed technical and price quotations in separately sealed envelopes( one technical and one price) To: The Office of Contracting and Procurement, 441 4<sup>th</sup> Street, NW, Suite 703 (Bid Room), Washington, D.C. 20001. THIS IS THE ONLY AUTHORIZED METHOD OF SUBMITTING A QUOTE FOR THIS RFQ.** All quotes must be received no later than the date and time stated in block 10 of the RFQ form. Technical proposals should include candidate resumes as well as company capability statements and all other information that the District would need for its evaluation.
- 13.2 Issuance of this RFQ does not commit the District to pay any costs incurred in the preparation of the submission of this quotation.
- 13.3 By submitting a quote, Quoter is representing that the candidates proposed are available to commence work promptly upon the Quoter's receipt of a PO provided that a PO is received within twenty one (21) days of submission in response to this RFQ. By submitting a Quote, Quoter further represents that it understands that award decisions will be made based, in part, on the quality of the candidate proposed, and that if the candidate should not be available to commence work, for whatever reason, at the beginning of the period of performance, the District reserved the right to cancel the award and proceed with awarding to another Quoter whose candidate is available.
- 13.4 The Standard Contract Provisions for Use with District of Columbia Government Supplies and Services Contracts, March 2007, are hereby incorporated by reference and made a part of this RFQ and the resultant PO. For a copy, go to OCP's website, <http://ocp.dc.gov>, and click on Solicitation Attachments.

END

# Attachment A

## OFFICE OF THE CHIEF TECHNOLOGY OFFICER ERP PROJECT MANAGER - PEOPLES OFT HCM TRANSITION TEAM STATEMENT OF WORK

### DEFINITIONS

**OCTO** – Office of the Chief Technology Officer within the Government of the District of Columbia.

**ERP**- Enterprise Resource Planning software, which is software that spans the entire District of Columbia

**HCM** – Human Capital Management, which is the name of the PeopleSoft Payroll and Human Resource system.

### 1. BACKGROUND

OCTO, in collaboration with the Office of the Chief Financial Officer (OCFO) and the District of Columbia Human Resources (DCHR) is embarking on an ambitious program to upgrade and implement PeopleSoft Human Capital Management (HCM) information systems to realize new efficiencies while simultaneously offering a broad range of new administrative services for the District. Currently, three core PeopleSoft HCM modules (HR, Benefit Administration and Time and Attendance) are deployed into operations and the deployment of the Payroll module is underway.

This citywide enterprise solution initiative will encompass, but not be limited to, business process engineering, system replacements, system enhancements, new systems selection, and custom enhancements of existing applications, system integration, and information technology oversight.

This effort will be accomplished through a series of inter-related information technology (IT) projects that will be managed, and/or coordinated within OCTO. OCTO will collaborate with the District agencies to assure that the technological solutions are responsive to the operational plans and priorities of client agencies and their partners within the District government, and with applicable community service providers.

### 2. SCOPE OF WORK

The Government of the District of Columbia, the Office of the Chief Technology Officer (OCTO) is seeking an Enterprise Resource Planning (ERP) Project Manager (PM) to plan, direct and coordinate the transition team that completes the implementation of the PeopleSoft HCM Information System. The current version being used is HCM v8.8, SP1 MP4.

Specific tasks will vary, however, this document is meant to serve as a summary or introduction to the known duties that must be handled. The Contractor will be responsible for the following tasks/milestones:

1. Plan, direct and coordinate the transition team that completes the installation of the PeopleSoft HCM Information System within prescribed time frames and funding parameters. This will include to manage periodic tax update processing, year end processing, W-2 processing and deployment of e-pay, and e- time modules.
2. Ensure that project goals are accomplished and in line with business objectives.
3. Manage the team that develops and carries out the project.
4. Monitor project activities and ensure the currency, quality, and integrity of the information, while providing consistency in content and "look and feel" across the enterprise.

5. Work closely with the assigned user community (and through business technologists) to determine how technology might assist in addressing its needs, and then translates these needs into system requirements and design specifications.
6. Understand how to leverage applications for competitive advantage.
7. Manage a dynamic team of individuals who constantly search for creative ways to elevate the capabilities of technology systems to meet business needs, partly by capitalizing on emerging technologies and partly by adapting technologies to the needs of the customer.
8. Review project proposals or plans to determine time frame, funding limitations, procedures for accomplishing projects, staffing requirements and allotment of available departmental resources to various project phases.
9. Establish work plan and staffing for each phase of projects, and arrange for recruitment or assignment of project personnel.
10. Confer with project staff to outline work plan.
11. Formulate and define technical scope and objectives of projects.
12. Identify and schedule project deliverables, milestones and required tasks.
13. Assign duties, responsibilities and scope of authority to project personnel.
14. Direct and coordinate activities of project personnel to ensure project progresses on schedule and within budget.
15. Review status reports prepared by project personnel, and modify schedules or plans as required.
16. Establish standards and procedures for project reporting and documentation.
17. Prepare project reports for management, clients or others.
18. Confer with project personnel to provide technical advice and to resolve problems.
19. Coordinate project activities with activities of business units.
20. Coordinate and respond to requests for changes from original specifications.
21. Identify project risk factors and develop risk mitigation strategy.
22. Develop quality assurance test plans.
23. Direct quality assurance testing.
24. Ensure easy access to information that is useful to users.
25. Keep close, direct contact with key end-user representatives to ensure technologies are providing valuable information-sharing capabilities to customers.
26. Manage internal and external systems/application development projects within assigned areas from inception to successful implementation:
  - a. Define project objectives, scope and level of effort.
  - b. Develop project strategies and plans, and identify the methods and tools required for the project.
  - c. Get projects off the ground, keep them on track and on budget, and resolve issues with customers.
  - d. Monitor progress against plan.
27. Work closely with end users, business technologists and others to understand and prioritize business goals and information needs, and then develop system requirements and design specifications; direct efforts to refine conceptual systems design requirements into the technical design.
28. Provide leadership and motivation to project team members throughout the project life cycle.
29. Lead the effort in creative approaches to problem solving and quality deliverables supporting business needs.

### **3. REQUIRED SKILLS/KNOWLEDGE**

**The selected contractor shall provide one and only one resource that meets the following requirements in order to be considered for the position:**

1. Education -Bachelor' s Degree in Computer Science, Information Systems, Public Administration, Business Administration, or other related field. Master' s Degree preferred.
2. 10+ years of government business experience.
3. 7+ years of implementation project management experience managing a variety of important, midsize to large technology projects.
4. 5+ years of technical management experience in a dynamic high-technology environment.
5. 3+ years of business-unit experience with sensitivity and commitment to business problem solving.
6. 5+ years of demonstrated management/supervisory experience in systems development, during which the following occurred:
  - i. Competency in strategic thinking and leadership with strong abilities in relationship management.
  - ii. Leadership of multidiscipline, high-performance work teams/groups.
  - iii. Successful development and implementation of new technology .
  - iv. Competency in project management and the execution of multiple or large projects.
  - v. Successfully developed and implemented new work processes or process improvements.
  - vi. Gained experience working with customers to develop solutions to complex business problems.
7. The contractor shall hold knowledge of full life cycle software development and software management skills.
8. The contractor shall hold excellent oral and written communication skills, including the ability to communicate technical subjects to non-technical persons.
9. The contractor shall be fully familiar with project management methodology developed by Project Management Institute (PMI). PMP certification is preferred.
10. The contractor shall be a citizen or permanent resident of the United States of America. This requirement will not count toward the technical evaluation of the candidate, but failure to comply with this requirement will result in an automatic disqualification.

### **4. PERIOD OF PERFORMANCE**

The period of performance shall be from date of award up to 1,500 hours with two (2) option periods of 1,500 hours for each option period. This will be a fixed priced labor hour contract.

### **5. SUPERVISORY CONTROLS**

Contractor works under the general supervision of the Program Manager of the Office of the Chief Technology Officer.

GOVERNMENT OF THE DISTRICT OF COLUMBIA  
OFFICE OF THE CHIEF FINANCIAL OFFICER  
OFFICE OF TAX AND REVENUE



**TAX CERTIFICATION AFFIDAVIT**

**THIS AFFIDAVIT IS TO BE COMPLETED ONLY BY THOSE WHO ARE REGISTERED TO CONDUCT BUSINESS IN THE DISTRICT OF COLUMBIA.**

Date: \_\_\_\_\_

Name of Organization/Entity: \_\_\_\_\_

Address: \_\_\_\_\_

Business Telephone No.: \_\_\_\_\_

Principal Officer:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Soc. Sec. No.: \_\_\_\_\_

Federal Identification No.: \_\_\_\_\_

Contract No.: \_\_\_\_\_

Unemployment Insurance Account No.: \_\_\_\_\_

I hereby certify that:

1. I have complied with the applicable tax filing and licensing requirements of the District of Columbia.
2. The following information is true and correct concerning tax compliance for the following taxes for the past five (5) years:

District:		Current	Not Current	Not Applicable
Sales and Use		( )	( )	( )
Employment Withholding		( )	( )	( )
Ball Park Fee		( )	( )	( )
Corporation Franchise		( )	( )	( )
Unincorporated Franchise		( )	( )	( )
Personal Property		( )	( )	( )
Real Property		( )	( )	( )
Individual Income		( )	( )	( )

**The Office of Tax and Revenue is hereby authorized to verify the above information with the appropriate government authorities. The penalty for making false statements is a fine not to exceed \$5,000.00, imprisonment for not more than 180 days, or both, as prescribed by D.C. Official Code § 47-4106.**

**This affidavit must be notarized and becomes void if not submitted within 90 days of the date notarized.**

\_\_\_\_\_  
Signature of Authorizing Agent Title

\_\_\_\_\_  
Print Name

Notary: DISTRICT OF COLUMBIA, ss:

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_ Month and Year

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

# ATTACHMENT C

## Sample Resume'

### Candidate 1

#### EDUCATION

**MIDWAY SCHOOL OF BUSINESS** - Chicago, IL  
**Master of Business Administration - Finance and Strategic Management** - June 2001

- Dean's Honor List
- Active member of Management Consulting, Corporate Management and Strategy, and High Tech Clubs.

**ANDERSEN COLLEGE** - Boston, MA  
**Bachelor of Arts in Physics (Cum Laude)** - June 1996

- Andersen College Scholarship for academic distinction; Dean's List all semesters
- Violinist in Andersen College Symphony
- Physics tutor for Bureau of Study Counsel; active participant in Habitat for Humanity
- Completed dissertation in the field of condensed matter theory

#### EXPERIENCE

**SMART BROTHERS** - New York, NY  
**Technology Project Manager - Investment Banking** - June 1997 - July 1999

- Managed project teams to develop profit and loss systems for Proprietary Trading group
- Promoted to project leadership role in two years, well ahead of department average of four
- Developed an original mathematical algorithm for trading processing module, improving performance by 1200%
- Led team of six analysts in firmwide project to reengineer loan syndicate trading flows in firm's largest technology project of 1999. Recommendations established new firmwide standard for real-time trade processing
- Appointed lead developer of interest accrual team after just three months in department. Initiated and designed project to create customized, improved interest accrual and P&L applications for fixed income controllers
- Selected to work on high-profile project to reengineer corporate bond trading P&L system. Reduced overnight processing time from six hours to 20 minutes and improved desktop application speed by 350%
- Devoted 20-25 hours a month to instructing junior members of the team in interest accrual and trading

**FINANCIAL TECHNOLOGY GROUP** - New York, NY  
**Analyst** - June 1996 - May 1997

- Developed cutting-edge analytic software for use by Wall Street traders
- Worked on a daily basis with clients to create and implement customized strategic software solution for equity traders. Helped create and deliver extensive training program for clients
- Initiated, created, and documented new firmwide standard for software module development

#### References (Three):

# PAST PERFORMANCE QUESTIONNAIRE

## INSTRUCTIONS

This form is provided to document the past performance of (name of company). The following standards shall be used in arriving at the rating. Upon completion of this form, please submit it as an e-mailed attachment to Shelvia N. Armstrong at e-mail address: [shelvia.armstrong@dc.gov](mailto:shelvia.armstrong@dc.gov) the subject line of the e-mail as “[Evaluated Vendor’s Name] – Past Performance Evaluation – (Solicitation Number-Solicitation Name). Thank you for assisting the Government of the District of Columbia in evaluating this Offeror's past performance.

<b><u>Numeric Rating</u></b>	<b><u>Adjective</u></b>	<b><u>Description</u></b>
0	Unacceptable	Contractor's performance failed to meet minimum requirements/contract expectations; e.g., no demonstrated capacity, major deficiencies which were not correctable
1	Poor	Contractor's performance marginally met minimum requirements/contract expectations; had major deficiencies which were correctable.
2	Minimally Acceptable	Contractor's performance marginally met minimum requirements/contract expectations; had minor deficiencies which were correctable.
3	Acceptable	Contractor's performance met requirements/contract expectations; no deficiencies.
4	Good	Contractor's performance met all requirements/contract expectations and exceeded some requirements/contract expectations; no deficiencies.
5	Excellent	Contractor's performance exceeded most, if not all requirements/contract expectations; no deficiencies.

If the element is not applicable, indicate with “N/A.” If no data has been obtained or additional comments are provided, please note in this column.

**PAST PERFORMANCE RATING FORM**

NAME OF COMPANY EVALUATED:

ADDRESS OF COMPANY EVALUATED:

TYPE OF SERVICES PERFORMED:

NAME OF EVALUATOR	EVALUATOR'S COMPANY/AGENCY			DATE EVALUATION PROVIDED		
	Excellent	Good	Acceptable	Minimally Acceptable	Poor	Unacceptable
<i>Performance Element</i>						
<b>1. QUALITY OF TECHNICAL APPROACH</b> (For example: Were the services comprehensive, complete, and feasible? (Met the needs, performed successfully, and accommodated changing requirements.)						
<b>2. EFFECTIVE AND EFFICIENT USE OF RESOURCES</b> (For example: Was the contractor able to obtain in a timely manner the amount and type of personnel resources required to support the project, effectively train personnel to perform the work required for the project, and maintain the required workforce throughout the term of the contract?)						
<b>3. EFFECTIVE AND EFFICIENT USE OF SUBCONTRACTORS</b> (For example: Was the experience of the subcontractors directly applicable to the project, did the contractor successfully met subcontracting goals and objectives as related to small, woman-owned and small disadvantaged businesses, and did the contractor successfully utilize and manage all subcontractor resources?)						
<b>4. QUALITY OF PERFORMANCE/CUSTOMER SATISFACTION</b> (For example: Was the contractor committed to customer satisfaction?)						

continued on next page

**PAST PERFORMANCE RATING FORM, continued**

<b>Performance Element</b>	<b>Excellent</b>	<b>Good</b>	<b>Acceptable</b>	<b>Minimally Acceptable</b>	<b>Poor</b>	<b>Unacceptable</b>
<b>5. BUSINESS BEHAVIOR</b> (For example: Was the contractor reasonable and cooperative at the corporate and program levels in response to changes in technical direction, correcting errors, poor performance, criticism/rejection of contract deliverables and other quality issues?)						
<b>6. COMMUNICATION</b> (For example: Did the contractor work and communicate well with contracting officers, contracting officer's technical representatives, end users, other contractors, subcontractors, and in-house staff?)						
<b>7. COST CONTROL</b> (For example: Was the contractor successful in planning and proposing realistic costs, monitoring performance, operating at or below budget, and implementing corrections/changes in a cost effective manner?)						
<b>8. TIMELINESS OF PERFORMANCE</b> (For example: Was the contractor successful in planning and proposing realistic schedules, monitoring performance, completing work on time, and implementing corrections/changes in a timely manner?)						
<b>9. UNDERSTANDING OF REQUIREMENTS</b> (For example: Did the contractor show an understanding of the scope of the requirements and an appreciation of the complexity of the requirements? And did the contractor effectively identify flaws, inconsistencies and other inaccuracies in your technical direction?)						
<b>OVERALL EVALUATION SCORE (Note: This must be consistent with the individual scores)</b>						

**Comments**

Please provide any comments regarding your performance element ratings in the appropriate spaces below. Please add additional pages as necessary.