

# THE UNIVERSITY OF RHODE ISLAND

## Solicitation Information

:

**TITLE:**

**Submission Deadline:** (Eastern Time)

<b>PRE-BID/ PROPOSAL CONFERENCE:</b>	<b>YES</b>	<b>NO</b>
<b>MANDATORY:</b>		
If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents.		
<b>DATE &amp; TIME:</b>		
<b>LOCATION:</b>		

Questions concerning this solicitation must be received by the URI Purchasing Department at [URIPurchasing@uri.edu](mailto:URIPurchasing@uri.edu) no later than (EST). Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

<b>BID SURETY BOND REQUIRED:</b>	<b>YES</b>	<b>NO</b>
<b>PAYMENT AND PERFORMANCE BOND REQUIRED:</b>	<b>YES</b>	<b>NO</b>

**BUYER:**

**Note to Applicants:**

- Applicants should register on-line at the URI Controller's Website at <https://web.uri.edu/controller/accounts-payable/suppliers/>
- Proposals received without a completed URI Bidder Certification Form may result in disqualification. **(only applicable when attached)**

**Respondent Information:**

Company Name \_\_\_\_\_

Address \_\_\_\_\_

Contact Name \_\_\_\_\_

Contact Email \_\_\_\_\_ :

Contact Phone \_\_\_\_\_

**University of Rhode Island Bidder Certification Form**  
**State of Rhode Island Procurement Regulations**

ALL OFFERS ARE SUBJECT TO THE REQUIREMENTS, PROVISIONS AND PROCEDURES CONTAINED IN THIS CERTIFICATION FORM. Offerors are expected to read, sign and comply with all requirements. Failure to do so may be grounds for disqualification of the offer contained herein.

Rules for Submitting Offers

This Certification Form must be attached in its entirety to the front of the offer and shall be considered an integral part of each offer made by a vendor to enter into a contract with the University of Rhode Island. As such, submittal of the entire Bidder Certification Form, signed by a duly authorized representative of the offeror attesting that he/she (1) has read and agrees to comply with the requirements set forth herein and (2) to the accuracy of the information provided and the offer extended, is a mandatory part of any contract award.

To assure that offers are considered on time, each offer must be submitted with the specific Bid/RFP/LOI number, date and time of opening marked in the upper left hand corner of the envelope. Each bid/offer must be submitted in separate sealed envelopes.

A complete signed (in ink) offer package must be delivered to the University of Rhode Island Purchasing Office by the time and date specified for the opening of responses in a sealed envelope.

Bid responses must be submitted on the URI bid solicitation forms provided, indicating brand and part numbers of items offered, as appropriate. Bidders must submit detailed cuts and specs on items offered as equivalent to brands requested WITH THE OFFER. Bidders must be able to submit samples if requested.

Documents misdirected to other State or University locations or which are not present in the University of Rhode Island Purchasing Office at the time of opening for whatever cause will be deemed to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the University of Rhode Island Purchasing Office. Postmarks shall not be considered proof of timely submission.

RIVIP SOLICITATIONS. To assure maximum access opportunities for users, public bid solicitations shall be posted on the RIVIP for a minimum of seven days and no amendments shall be made within the last five days before the date an offer is due. Except when access to the Web Site has been severely curtailed and it is determined by the Purchasing Agent that special circumstances preclude extending a solicitation due date, requests to mail or fax hard copies of solicitations will not be honored.

PRICING. Offers are irrevocable for sixty (60) days from the opening date (or such other extended period set forth in the solicitation), and may not be withdrawn, except with the express permission of the University Purchasing Agent. All pricing will be considered to be firm and fixed unless otherwise indicated. The University of Rhode Island is exempt from Federal excise taxes and State Sales and Use Taxes. Such taxes shall not be included in the bid price.

ALL PRICES QUOTED ARE FOB DESTINATION.

DELIVERY and PRODUCT QUALITY. All offers must define delivery dates for all items; if no delivery date is specified, it is assumed that immediate delivery from stock will be made. The contractor will be responsible for delivery of materials in first class condition. Rejected materials will be at the vendor's expense.

PREVAILING WAGE, OSHA SAFETY TRAINING and APPRENTICESHIP REQUIREMENTS. Bidders must comply with the provisions of the Rhode Island labor laws, including R.I. Gen. Laws §§ 37-13-1 et seq. and occupational safety laws, including R.I. Gen. Laws §§ 28-20-1 et seq. These laws mandate for public works construction projects the payment of prevailing wage rates, the implementation and maintenance of occupational safety standards, and for projects with a minimum value of \$1 Million, the employment of apprentices. The successful Bidder must submit certifications of compliance with these laws from each of its subcontractors prior to their commencement of any work. Prevailing wage rates, apprenticeship requirements, and other workforce and safety regulations are accessible at [www.dlt.ri.gov](http://www.dlt.ri.gov).

PUBLIC RECORDS. Offerors are advised that all materials submitted to the University for consideration in response to this solicitation will be considered without exception to be Public Records pursuant to Title 38 Chapter 2 of the Rhode Island General Laws, and will be released for inspection immediately upon request once an award has been made. Offerors are encouraged to attend public bid/RFP openings to obtain information; however, bid/RFP response summaries may be reviewed after award(s) have been made by visiting the Rhode Island Vendor Information Program (RIVIP) at [www.purchasing.ri.gov](http://www.purchasing.ri.gov) > Solicitation Opportunities > Other Solicitation Opportunities. Telephone requests for results will not be honored. Written requests for results will only be honored if the information is not available on the RIVIP.

Award will be made to the responsive and responsible offeror quoting the lowest net price in accordance with specifications, for any individual item(s), for major groupings of items, or for all items listed, at the University's sole option.

BID SURETY. Where bid surety is required, bidder must furnish a bid bond or certified check for 5% of the bid total with the bid, or for such other amount as may be specified. Bids submitted without a required bid surety will not be considered.

SPECIFICATIONS. Unless specified “no substitute”, product offerings equivalent in quality and performance will be considered (at the sole option of the University) on the condition that the offer is accompanied by detailed product specifications. Offers which fail to include alternate specifications may be deemed nonresponsive.

VENDOR AUTHORIZATION TO PROCEED. When a purchase order, change order, contract/agreement or contract/agreement amendment is issued by the University of Rhode Island, no claim for payment for services rendered or goods delivered contrary to or in excess of the contract terms and scope shall be considered valid unless the vendor has obtained a written change order or contract amendment issued by the University of Rhode Island Purchasing Office PRIOR to delivery.

Any offer, whether in response to a solicitation for proposals or bids, or made without a solicitation, which is accepted in the form of an order OR pricing agreement made in writing by the University of Rhode Island Purchasing Office, shall be considered a binding contract.

REGULATIONS, GENERAL TERMS AND CONDITIONS GOVERNING STATE AND THE UNIVERSITY OF RHODE ISLAND CONTRACTS. This solicitation and any contract or purchase order arising from it are issued in accordance with the specific requirements described herein, and the State’s [Purchasing Laws](#) and the [RI Division of Purchases Procurement Regulations and General Conditions of Purchase](#).

EQUAL EMPLOYMENT OPPORTUNITY. Compliance certificate and agreement procedures will apply to all awards for supplies or services valued at \$10,000 or more. Minority Business Enterprise policies and procedures, including subcontracting opportunities as described in Title 37 Chapter 14.1 of the Rhode Island General Laws also apply.

PERFORMANCE BONDS. Where indicated, successful bidder must furnish a 100% performance bond and labor and payment bond for contracts subject to Title 37 Chapters 12 and 13 of the Rhode Island General Laws. All bonds must be furnished by a surety company authorized to conduct business in the State of Rhode Island. Performance bonds must be submitted within 21 calendar days of the issuance of a tentative notice of award.

DEFAULT and NON-COMPLIANCE Default and/or non-compliance with the requirements and any other aspects of the award may result in withholding of payment(s), contract termination, debarment, suspension, or any other remedy necessary that is in the best interest of the state/University of Rhode Island.

COMPLIANCE Vendor must comply with all applicable federal, state and local laws, regulations and ordinances.

SPRINKLER IMPAIRMENT AND HOT WORK. The Contractor agrees to comply with the practices of the State’s Insurance carrier for sprinkler impairment and hot work. Prior to performing any work, the Contractor shall obtain the necessary information for compliance from the Risk Management Office at the Department of Administration or the Risk Management Office at the University of Rhode Island.

Each bid proposal for a *public works project* must include a “public copy” to be available for public inspection upon the opening of bids. **Bid Proposals that do not include a copy for public inspection will be deemed nonresponsive.**

For further information on how to comply with this statutory requirement, see [R.I. Gen. Laws](#) §§ 37-2-18(b) and (j). Also see State of Rhode Island Procurement Regulation 5.11 at : <https://ridop.ri.gov/about-us/procurement-statutes-and-regulations>

**SECTION 2 – DISCLOSURES**

**ALL CONTRACT AWARDS ARE SUBJECT TO THE FOLLOWING DISCLOSURES & CERTIFICATIONS**

Offerors must respond to every disclosure statement. A person authorized to enter into contracts must sign the offer and attest to the accuracy of all statements.

**Indicate Yes (Y) or No (N):**

\_\_\_\_1 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been subject to suspension or debarment by any federal, state, or municipal government agency, or the subject of criminal prosecution, or convicted of a criminal offense with the previous five (5) years. If Yes, then provide details below.

\_\_\_\_2 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has had any contracts with a federal, state or municipal government agency terminated for any reason within the previous five (5) years. If Yes, then provide details below.

\_\_\_\_3 State whether your company or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been fined more than \$5000 for violation(s) of Rhode Island environmental laws by the Rhode Island Department of Environmental Management within the previous five (5) years. If Yes, then provide details below.

\_\_\_\_4 State whether any officer, director, manager, stockholder, member, partner, or other owner or principal of the Bidder is serving or has served within the past two calendar years as either an appointed or elected official of any state governmental authority or quasi-public corporation, including without limitation, any entity created as a legislative body or public or state agency by the general assembly or constitution of this state. If Yes, then provide details below.

IF YOU HAVE ANSWERED “YES” TO QUESTIONS #1 – 4 PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

---

---

---

---

---

---

---

**SECTION 3 - OWNERSHIP DISCLOSURE**

**Vendors must provide all relevant information. Bid proposals submitted without a complete response may be deemed nonresponsive.**

If the vendor is privately held, the vendor shall provide ownership information below.

List each officer, director, manager, stockholder, member, partner, or other owner or principle of the Bidder, and each intermediate parent company and the ultimate parent company of the Bidder. For each individual, provide his or her name, business address, principal occupation, position with the Vendor, and the percentage of ownership, if any, he or she holds in the Vendor, and each intermediate parent company and the ultimate parent company of the Vendor.

If the company is publicly held, the vendor may provide owner information about only those stockholders, members, partners, or other owners that hold at least 10% of the record or beneficial equity interests of the vendor; otherwise, complete ownership disclosure is required.

---

---

---

---

---

---

---

SECTION 4 - CERTIFICATIONS

Bidders must respond to every statement. Bid proposals submitted without a complete response may be deemed nonresponsive.

Indicate "Y" (Yes) or "N" (No), and if "No," provide details below.

THE VENDOR CERTIFIES THAT:

\_\_\_1 I/we certify that I/we will immediately disclose, in writing, to the University Purchasing Agent any potential conflict of interest which may occur during the course of the engagement authorized pursuant to this contract.

\_\_\_2 I/we acknowledge that, in accordance with (1) Chapter §37-2-54(c) of the Rhode Island General Laws "no purchase or contract shall be binding on the state or any agency thereof unless approved by the Department [of Administration] or made under general regulations which the Chief Purchasing Officer may prescribe," and (2) RIGL section §37-2-7(16) which identifies the URI Board of Trustees as a public agency and gives binding contractual authority to the University Purchasing Agent, including change orders and other types of contracts and under State Purchasing Regulation 8.2.B any alleged oral agreement or arrangements made by a bidder or contractor with any agency or an employee of the University of Rhode Island may be disregarded and shall not be binding on the University of Rhode Island.

\_\_\_3 I/we certify that I or my/our firm possesses all licenses required by Federal and State laws and regulations as they pertain to the requirements of the solicitation and offer made herein and shall maintain such required license(s) during the entire course of the contract resulting from the offer contained herein and, should my/our license lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

\_\_\_4 I/we certify that I/we will maintain required insurance during the entire course of the contract resulting from the offer contained herein and, should my/our insurance lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

\_\_\_5 I/we certify that I/we understand that falsification of any information herein or failure to notify the University of Rhode Island Purchasing Agent as certified herein may be grounds for suspension, debarment and/or prosecution for fraud.

\_\_\_6 I/we acknowledge that the provisions and procedures set forth in this form apply to any contract arising from this offer.

\_\_\_7 I/we acknowledge that I/we understand the State's Purchasing Laws ([§37-2 of the General Laws of Rhode Island](#)) and the [RI Division of Purchases Regulations](#) apply as the governing conditions for any contract or purchase order I/we may receive from the University of Rhode Island, including the offer contained herein.

\_\_\_8 I/we certify that the bidder: (i) is not identified on the General Treasurer's list, created pursuant to R.I. Gen. Laws § 37-2.5-3, as a person or entity engaging in investment activities in Iran described in § 37-2.5-2(b); and (ii) is not engaging in any such investment activities in Iran.

\_\_\_9 If the product is subject to Department of Commerce Export Administration Regulations (EAR) or International Traffic in Arms Regulations (ITAR), please provide the Export Control Classification Number (ECCN) or the US Munitions List (USML) Category: \_\_\_\_\_

\_\_\_10 I/we certify that the above information is correct and complete.

IF YOU ARE UNABLE TO CERTIFY YES TO QUESTIONS #1 – 8 and 10 OF THE FOREGOING, PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

**Signature below commits vendor to the attached offer and certifies (1) that the offer has taken into account all solicitation amendments where applicable, (2) that the above statements and information are accurate and that vendor understands and has complied with the requirements set forth herein.**

Vendor/Company Name; \_\_\_\_\_

Vendor's Signature: \_\_\_\_\_ Bid Number: \_\_\_\_\_ Date: \_\_\_\_\_  
(Person Authorized to enter into contracts; signature must be in ink) (if applicable)

\_\_\_\_\_  
Print Name and Title of Company official signing offer

## **SECTION 1: INTRODUCTION**

The University of Rhode Island Board of Trustees /University of Rhode Island is soliciting proposals for Workday Strategic Advisory and Quality Assurance Services (SAQAS) from qualified OFFERORS to provide advisory services for URI Workday implementation activities related to readiness analysis, Workday functional and technical design, organizational change management, and program management in accordance with the terms of this Request for Proposal (“RFP”) and General Terms and Conditions of Purchase indicated on the attached Bidder Certification Form.

The initial contract period will begin approximately April 15, 2025. Contracts may be renewed for up to 5 additional 12-month periods based on vendor performance and the availability of funds.

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the University of Rhode Island Purchasing Department pursuant to this solicitation, other than to name those offerors who have submitted proposals.

### **Instructions and Notifications to Offerors**

1. Potential offerors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content shall be borne by the vendor. The University assumes no responsibility for these costs even if the RFP is cancelled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the University of Rhode Island Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor’s proposal, and the subcontractor(s) to be used is identified in the proposal.
7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.

8. Vendors are advised that all materials submitted to the University of Rhode Island Purchasing Department for consideration in response to this RFP may be considered to be public records, as defined in R. I. Gen. Laws § 38-2-1, *et seq.*, and may be released for inspection upon request, once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the University of Rhode Island Purchasing Department may release records marked confidential by a vendor upon a public records request if the University determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature. Vendors are also advised that responses marked confidential in their entirety may be deemed non-responsive. **Inclusion of a “confidentiality header/footer” on entire pages of submissions (or all pages) is NOT considered an acceptable way to flag confidential information (flags must be very specific and a specific justification explaining how the information meets the APRA exception must be provided with it) and will not be recognized by URI.**

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an “Affirmative Action Policy Statement.”

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written “Affirmative Action Plan” prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.

- b. Vendors further agree, where applicable, to complete the “Contract Compliance Report” (as well as the “Certificate of Compliance”) <https://dedi.ri.gov/divisions-units/equal-opportunity-office/contract-compliance-related-forms> and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order. For public works projects vendors and all subcontractors must submit a “Monthly Utilization Report” to the ODEO/State Equal Opportunity Office, which identifies the workforce actually utilized on the project.

For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at <https://dedi.ri.gov/divisions-units/equal-opportunity-office> .

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).

12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”)(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <https://dedi.ri.gov/divisions-units/minority-business-enterprise-compliance-office> . Information regarding DisBEs may be accessed at [www.gcd.ri.gov](http://www.gcd.ri.gov).

For further information, visit the Office of Equity, Diversity and Inclusion’s website, at <https://dedi.ri.gov/> and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1.

13. Not Applicable
14. Not Applicable
15. Not Applicable
16. Not Applicable
17. Not Applicable
18. Not Applicable

## 19. Not Applicable

Restrictions on Communications – No Bidder-initiated contact, other than normal business activities not associated with this procurement, will be allowed after the issuance of this RFP between Bidders and University employees or their agents regarding this solicitation, except with express permission of the University Purchasing Department. Any such other contact may be considered improper and may disqualify a Bidder from further consideration. The appropriate channel to direct any communications, concerns or questions regarding the RFP is through the email address provided herein.

If a Bidder fails to notify the University of Rhode Island Purchasing Department contact person of an error in this RFP which was known or reasonably should have been known to the Bidder, the Bidder shall submit a response at the Bidder's own risk. If awarded the contract, the Bidder shall not be entitled to additional compensation or performance time by reason of the error or its later correction.

## **SECTION 2: BACKGROUND**

The University of Rhode Island (URI), a public land-grant and sea-grant research institution, serves as the state's flagship research university, driving Rhode Island's economic and social development. Founded in 1892, URI delivers undergraduate, graduate, and professional programs across its main campus in Kingston and three satellite campuses. This initiative is authorized and supported by the URI Board of Trustees, acting on behalf of the state, with a mandate to modernize critical administrative systems to align with the University's mission, vision, and strategic priorities outlined in [FOCUS URI](#).

### **The Need for Modernization**

URI's current Enterprise Resource Planning (ERP) system, PeopleSoft, has been in use for over 23 years and no longer aligns with the University's evolving operational and strategic needs. The legacy system, encompassing Human Capital Management (HCM), Financial Management (FM), and Campus Solutions, has been heavily customized over the years. These customizations include embedding business logic into the database and using operating system-level tools for critical processes, which have resulted in significant technical debt and reduced flexibility. Key challenges include:

- **Incomplete Implementation:** Certain PeopleSoft modules were never fully utilized.
- **Reliance on Custom Solutions:** Alternative in-house solutions were created to fill gaps, duplicating functions now standard in PeopleSoft.
- **Stagnant Processes:** Many business processes, particularly in finance and human resources, have not been updated in response to the evolving needs of URI, leading to inefficiencies.

The outdated system limits URI's ability to operate efficiently, comply with modern regulatory requirements, and meet the expectations of a modern research university.

## **Organizational and Cultural Challenges**

This initiative is not just about replacing technology but about transforming URI's approach to business operations, organizational structures, and institutional culture. The modernization effort provides an opportunity to:

- Reevaluate and standardize business processes to align with current best practices.
- Modernize operations to reflect the needs of a 21st-century research university.
- Address long-standing beliefs and assumptions about process, resource, and compliance constraints, some of which may not adequately reflect current constraints.

Adhering to state-mandated policies for procurement, financial operations, and employment adds complexity to this transformation, further emphasizing the need for a strategic and innovative approach. Additionally, URI is a heavily unionized organization, and its 35-hour work week will require careful consideration during the planning and implementation phases to ensure alignment with the University's labor structure and commitments.

## **Current Context and Resource Constraints**

URI faces significant resource limitations that make this transformation both urgent and challenging. These include:

- An understaffed ITS department and key administrative areas, particularly in Finance and HR.
- All teams—ITS, Financial, and HR—face substantial existing workloads.
- A workforce with many nearing retirements, necessitating succession planning and workforce development.

Extensive organizational change management (OCM), training, and coaching will be required to transform URI's financial, HR, and ITS teams into modern, efficient, and fully engaged units aligned with institutional priorities.

## **Reevaluating Assumptions**

This initiative presents an opportunity to carefully examine long-standing assumptions about URI's operational and regulatory environment. Over time, beliefs about what URI can and cannot do—whether in terms of processes, resources, best practices, or compliance—have become entrenched. Early assessments indicate that some of these assumptions may not reflect current regulatory requirements. A thoughtful reevaluation will help uncover opportunities for innovation and improvement, enabling URI to move forward with clarity and confidence.

## Strategic Goals

The modernization effort aims to create a more efficient, responsive, and aligned institution. Key objectives include:

- **Modernized Business Processes:** Simplifying and standardizing operations to reduce inefficiencies and enhance effectiveness.
- **Organizational Transformation:** Building modern, agile HR, financial, and ITS teams fully aligned with institutional goals.
- **Cultural Change:** Promoting collaboration, innovation, and continuous improvement.
- **Sustainability and Adaptability:** Developing internal capacity to adapt to future needs and challenges.

## Workday’s Role and Strategic Vision

URI has chosen Workday as its next-generation ERP solution for HCM and FM. Workday has expressed interest in making URI a showcase institution for its Workday Launch methodology. However, URI’s unique challenges necessitate a readiness assessment to determine whether the Launch methodology is feasible or if an alternative approach, such as Workday Your Way, is better suited.

Workday’s implementation represents a critical step in URI’s strategic vision to:

- Enhance operational efficiency.
- Improve compliance with state and federal regulations.
- Support a culture of innovation, collaboration, and continuous improvement.

RI will implement a robust Workday capability as part of our ERP transformation project. The current planned module scope is listed in the table below. The scope may change slightly as we go through design sessions.

SKU	Service
CHCM	Core Human Capital Management
TLO	Talent Optimization
CCB	Cloud Connect for Benefits
USP**	Payroll for United States
CCTPP**	Cloud Connect for Third Party Payroll
LRN	Learning
MCNF	Media Cloud - No Fee
LRNXE	Workday Learning for Extended Enterprise
REC	Recruiting
CE	Candidate Engagement

MSG	Messaging
FIN	Core Financials
GM	Grants Management
PLNF	Financial Planning
PRA	Prism Analytics Enterprise
PRJT	Projects
TT	Time Tracking
SC	Scheduling
EXP	Expenses
PRO	Procurement
SCLO	Labor Optimization
XTND	Extend Professional
WSP	Workday Success Plan

### **SECTION 3: SCOPE OF WORK AND REQUIREMENTS**

#### **General Scope of Work**

The University of Rhode Island (URI) is seeking proposals from qualified vendors to provide independent Strategic Advisory and Quality Assurance Services (SAQAS) for its upcoming implementation of Workday Human Capital Management (HCM) and Financial Management systems. The selected vendor will play a pivotal advisory role in ensuring the success of URI's Enterprise Resource Planning (ERP) transformation by conducting a pre-implementation readiness assessment, fit-gap analysis, and preparation activities (Phase 0), as well as providing ongoing strategic advisory and quality assurance services during the implementation phase.

**Important Note:** The vendor selected for this RFP will **not** be eligible to provide additional services outside the scope of this RFP related to Workday during the implementation phases. Specifically, the selected vendor cannot provide system integration, data extraction, transformation, and loading (ETL), workforce backfill or front-fill, or any other implementation services. The vendor's role is strictly limited to providing independent strategic advisory and quality assurance services as outlined in this RFP.

#### **Specific Activities / Tasks**

The vendor's responsibilities are divided into two main phases: **Phase 0** (Pre-Implementation Readiness Assessment, Fit-Gap Analysis, and Preparation) and the **Implementation Phase** (Quality Assurance and Advisory Role).

## **Phase 0: Pre-Implementation Readiness Assessment, Fit-Gap Analysis, and Preparation**

URI has chosen Workday Launch as its preferred implementation methodology for the Workday HCM and Financial Management systems. The vendor will assist URI in conducting a thorough readiness assessment and fit-gap analysis to determine what is required to successfully adopt the Workday Launch methodology. If, and only if, it is determined that URI cannot feasibly implement using the Workday Launch methodology, the vendor will then recommend alternative implementation methods, such as Workday Your Way.

### **Key Responsibilities**

During Phase 0, the vendor will:

#### **1. Assess Feasibility of Workday Launch Methodology**

- **Evaluate Readiness:** Assess URI's organizational, technical, and operational readiness to adopt the Workday Launch methodology.
- **Identify Gaps:** Determine the specific gaps that need to be addressed to successfully implement Workday using the Launch methodology.
- **Provide Recommendations:** Offer detailed recommendations on how to address the identified gaps to enable the adoption of Workday Launch.

#### **2. Address Readiness Shortcomings and Close Requisite Gaps**

- **Gap Closure Planning:** Assist URI in prioritizing gaps and developing plans to address them before the implementation kickoff.
- **Operationalize Findings:** Provide guidance on how to operationalize the findings from the readiness assessment, including who needs to be involved and what actions are required.
- **Direct and Advise:** Write detailed plans and advise URI on executing the necessary steps to close the gaps.

#### **3. Conduct a Comprehensive Fit-Gap Analysis**

- **Process Evaluation:** Analyze current business processes and compare them with Workday's capabilities.
- **Visual Stakeholder Maps:** Create visual stakeholder maps showing relationships between stakeholders, business processes, and relevant systems.
- **Actionable Solutions:** Provide actionable solutions to bridge gaps between current operations and Workday requirements.

#### **4. Establish Project Governance Framework**

- **Governance Structure:** Develop a governance framework that defines roles, responsibilities, decision-making authority, and reporting protocols.
- **Rapid Decision-Making:** Design the framework to facilitate rapid and effective decision-making throughout the implementation.
- **Guiding Principles:** Provide support for creating guiding principles, and MVV statement, and other support documents.

#### **5. Develop Data Governance and Preparation Strategies**

- **Roles & Responsibilities:** Help define clear roles and responsibilities, data ownership, and methods of achieving ground-truths.
- **Data Cleanup and Transformation:** Recommend strategies for data cleanup and transformation protocols.

- **Master Data Management:** Establish master data management practices to ensure data integrity.
  - **Data Migration Planning:** Advise on which data to migrate to Workday, retain externally, or archive.
6. **Standardize Business Processes**
- **Alignment with Best Practices:** Advise on aligning URI's business processes with Workday and general industry best practices.
  - **Process Simplification:** Identify opportunities for simplifying and standardizing processes across departments.
  - **Impact Analysis:** Assess potential impacts on business operations beyond Workday.
7. **Review Integration Landscape**
- **Integration Inventory:** Conduct an in-depth review and inventory of existing integrations, methods, and tools both within URI and with the State of Rhode Island.
  - **Simplification Recommendations:** Recommend ways to simplify the integration landscape, reduce reliance on custom solutions, and maintain essential functionalities. Identify opportunities to eliminate integrated systems that may no longer be needed post go-live.
  - **Integration Strategy:** Develop a strategy for integrations that balances efficiency and functionality.
8. **Optimize Chart of Accounts (COA)**
- **COA Analysis:** Analyze the current Chart of Accounts structure.
  - **Optimization Recommendations:** Provide recommendations to enhance reporting, streamline financial workflows, and ensure compatibility with Workday.
9. **Guide in the Development of the URI Supervisory Organizational Structure**
- **Assess Current Structure:** Analyze the current supervisory org structure.
  - **Support the Design, Build, & Acceptance:** Provide guidance and recommendations on how to best implement a supervisory org structure.
10. **Assess Workforce Readiness and Support Change Management**
- **Readiness Assessment:** Evaluate the readiness of URI's workforce, including skills and responsibilities inventories.
  - **Staffing Plan:** Develop staffing plans for both temporary and permanent needs, considering the 35-hour workweek and unionized environment.
  - **Change Management Strategy:** Provide guidance on change management strategies, training, and coaching to prepare staff for the transition.
11. **Assess Technology Infrastructure and Security**
- **Infrastructure Evaluation:** Assess URI's current technology infrastructure and its ability to support Workday's cloud-based environment.
  - **Security Assessment:** Evaluate security protocols and identify enhancements needed for data protection and compliance.
  - **Recommendations:** Provide actionable recommendations for infrastructure and security improvements. This should include recommendations for sensitive document storage.
12. **Ensure Compliance with Regulatory Requirements**

- **Compliance Review:** Conduct an initial review to ensure alignment with data privacy, security, and other regulations including state and local regulations.
- **Regulatory Alignment:** Provide recommendations to address any compliance gaps.

### 13. Define Initial Success Metrics

- **Benchmarking Goals:** Establish initial success metrics and benchmarks to guide project evaluation and measure progress.

### 14. Develop a Project Plan for Phase 0

- **Comprehensive Planning:** Develop a detailed project plan for Phase 0, outlining key activities, milestones, timelines, resource requirements, and dependencies necessary to achieve readiness assessment and gap closure objectives.
- **Stakeholder Engagement:** Engage stakeholders to validate and refine the project plan, ensuring alignment with institutional needs, priorities, and URI's strategic goals.
- **Foundation for Implementation:** Ensure the Phase 0 project plan establishes a clear foundation for transitioning into the implementation phase, addressing risks and enabling seamless continuity.
- **Define Initial Project Milestones and Risk Management Framework**
- **Project Timeline:** Develop a detailed timeline for Phase 0 activities, including assessment and readiness efforts.
- **Risk Identification:** Establish a foundational risk management framework to identify and mitigate potential risks

### 15. Advise on the Development of a Project Plan for Implementation

- **Strategic Guidance:** Provide expert recommendations to shape the implementation project plan, ensuring alignment with URI's objectives and Workday best practices.
- **Critical Components:** Advise on incorporating key elements such as change management, data migration, testing strategies, training programs, and post-go-live support into the implementation project plan.
- **Alignment Across Phases:** Ensure the implementation project plan builds on the outputs and findings of Phase 0, maintaining consistency and addressing identified gaps.
- **Stakeholder Collaboration:** Guide URI leadership in engaging stakeholders to refine and finalize the implementation project plan, fostering ownership and alignment.

### Phase 0 Deliverables

The vendor will provide a comprehensive list of deliverables for Phase 0, including detailed documentation, visual aids, and actionable plans to ensure URI's readiness for the Workday implementation. The suggested deliverables are as follows:

#### 1. Readiness Assessment Report

- **Comprehensive Evaluation:** A thorough assessment of URI's organizational, technical, and operational readiness to adopt the Workday Launch methodology.
- **Gap Identification:** Detailed identification of specific gaps that need to be addressed for successful implementation.
- **Feasibility Analysis:** An analysis of the feasibility of adopting Workday Launch, supported by data and stakeholder input.
- **Recommendations:** Detailed recommendations on strategies and actions to address each identified gap, enabling the adoption of Workday Launch.

#### 2. Gap Closure Plan

- **Action Plan:** A prioritized plan outlining activities required to close readiness gaps before the implementation kickoff.
- **Timelines and Resources:** Specific timelines, resource requirements, and assigned responsibilities for each activity.
- **Operational Guidance:** Guidance on how to operationalize findings, including detailed steps and methodologies.
- **Stakeholder Roles:** Identification of who needs to be involved in each gap closure activity and their respective roles.

### 3. Fit-Gap Analysis Report

- **Process Evaluation:** In-depth analysis comparing current business processes with Workday's capabilities.
- **Gap Analysis:** Identification of functional and technical discrepancies between current operations and Workday requirements.
- **Actionable Solutions:** Specific recommendations to bridge each identified gap, including process changes or configurations.
- **Visual Aids:**
  - **Visual Stakeholder Maps:** Diagrams illustrating relationships between stakeholders, processes, and systems.
  - **Process Flow Diagrams:** Visual representations of current and proposed workflows.
  - **Data Models:** Schematics showing current data structures versus Workday data requirements.

### 4. Project Governance Framework Document

- **Governance Structure:** Definition of the governance model, including roles, responsibilities, and authority levels.
- **Decision-Making Protocols:** Procedures for rapid and effective decision-making, including escalation paths.
- **Supplemental Documentation:** Make recommendations on and help and advise in the creation of process documents, training documents, whitepapers, decision documents, and related documents.
- **Reporting Protocols:** Guidelines for communication and reporting among project teams and stakeholders.
- **Governance Bodies:** Recommendations for establishing governance bodies such as steering committees and project management offices.

### 5. Data Governance and Preparation Strategy

- **Roles & Responsibilities:** Clear definition of data ownership, stewardship, and governance roles.
- **Ground-Truth Methods:** Strategies for achieving data accuracy and consistency across the organization.
- **Data Cleanup Plan:** Detailed plan for data cleansing, including tools and methodologies.
- **Transformation Protocols:** Guidelines for data transformation to meet Workday requirements.
- **Master Data Management:** Establishment of practices to maintain data integrity and quality.
- **Data Migration Planning:** Recommendations on:
  - Data to be migrated to Workday.
  - Data to be retained externally or archived.

- Archival methods and data retrieval processes.

## 6. Business Process Standardization Plan

- **Best Practice Alignment:** Recommendations for aligning business processes with Workday and industry best practices.
- **Process Simplification:** Identification of opportunities to streamline and standardize processes across departments.
- **Impact Analysis:** Assessment of potential impacts on operations, personnel, and stakeholders.
- **Implementation Approach:** Suggested approach for adopting standardized processes, including change management considerations.

## 7. Integration Landscape Review Report

- **Integration Inventory:** Comprehensive list of existing integrations, interfaces, and dependencies.
- **Assessment of Necessity:** Evaluation of each integration's relevance post-Workday implementation.
- **Simplification Recommendations:** Strategies to simplify the integration landscape and reduce reliance on custom solutions.
- **Elimination Opportunities:** Identification of systems and integrations that can be decommissioned post go-live.
- **Integration Strategy:** Development of a balanced approach to maintain essential functionalities while enhancing efficiency.

## 8. Chart of Accounts (COA) Optimization Report

- **COA Analysis:** Detailed examination of the current COA structure and its alignment with reporting needs.
- **Optimization Recommendations:** Strategies to restructure the COA for improved financial reporting and workflow efficiency.
- **Workday Compatibility:** Ensuring the COA aligns with Workday Financial Management capabilities.
- **Regulatory Compliance:** Verification that the optimized COA meets all regulatory and compliance requirements.

## 9. Supervisory Organizational Structure Report

- **Current Org Structure Analysis:** Detailed examination of the current URI organizational structure and its alignment Workday implementation needs.
- **Optimization Recommendations:** Strategies to define or refine the organizational structure in preparation for Workday implementation.

## 10. Workforce Readiness and Staffing Plan

- **Readiness Assessment:** Evaluation of staff readiness, including skills, competencies, and capacity.
- **Skills and Responsibilities Inventory:** Detailed inventory of current staff capabilities relative to future needs.
- **Staffing Plan:**
  - **Temporary Needs:** Recommendations for temporary staffing, backfill, or front-fill positions during implementation.

- **Permanent Needs:** Identification of long-term staffing requirements post-implementation.
- **35-Hour Workweek Consideration:** Strategies to accommodate URI's workweek structure and union agreements.
- **Training and Development:** Plans for training programs and coaching to address skill gaps and prepare staff for new roles.

#### 11. Technology Infrastructure and Security Assessment

- **Infrastructure Evaluation:** Assessment of current hardware, network, and system capabilities to support Workday.
- **Security Assessment:** Analysis of existing security measures, identifying vulnerabilities and compliance gaps.
- **Recommendations:**
  - **Infrastructure Enhancements:** Required upgrades or modifications to meet Workday's performance requirements.
  - **Security Improvements:** Measures to enhance data protection, access controls, and threat mitigation.
- **Compliance Alignment:** Ensuring alignment with data protection regulations, including FERPA and state/local laws.

#### 12. Initial Project Milestones and Timeline

- **Detailed Timeline:** Comprehensive schedule of Phase 0 activities, including start and end dates for each task.
- **Milestones:** Key milestones and deliverables to track progress.
- **Readiness Activities:** Inclusion of activities aimed at closing gaps before implementation kickoff.
- **Dependencies and Critical Paths:** Identification of task dependencies and critical path analysis.
- **Alignment with Strategic Goals:** Ensuring timelines support URI's overall strategic objectives.

#### 13. Risk Management Framework

- **Risk Identification:** Comprehensive list of potential risks, including organizational, technical, and external factors.
- **Risk Analysis:** Assessment of the likelihood and impact of each identified risk.
- **Mitigation Strategies:** Detailed plans to prevent or minimize the impact of risks.
- **Monitoring and Reporting:** Procedures for ongoing risk monitoring and communication to stakeholders.

#### 14. Compliance and Data Privacy Review

- **Regulatory Assessment:** Evaluation of compliance with data privacy, security, and other relevant regulations (e.g., FERPA, state, and local laws).
- **Gap Analysis:** Identification of areas where current practices may not meet regulatory requirements.
- **Recommendations:** Actionable steps to address compliance gaps, including policy updates and procedural changes.
- **Data Privacy Policies:** Development or enhancement of data privacy policies and procedures.

## 15. Initial Success Metrics and Benchmarking Goals

- **Key Performance Indicators (KPIs):** Definition of measurable KPIs to assess project success.
- **Benchmarking:** Establishment of baseline metrics for current performance to compare against post-implementation results.
- **Measurement Plan:** Methods and tools for tracking progress against success metrics.
- **Reporting Schedule:** Timelines for regular reporting on KPI progress to stakeholders.

## 16. Phase 0 Project Plan

- **Comprehensive Planning Document:** A detailed project plan for Phase 0, including all activities, timelines, resources, and responsibilities.
- **Activities and Tasks:** Breakdown of tasks necessary for readiness assessment and gap closure.
- **Milestones and Deliverables:** Clear identification of milestones and expected deliverables for Phase 0.
- **Resource Allocation:** Allocation of personnel, time, and materials required for each task.
- **Dependencies and Assumptions:** Documentation of task dependencies and any assumptions made.
- **Stakeholder Engagement Plan:** Strategy for involving stakeholders in validating and refining the project plan.
- **Communication Plan:** Outline of communication methods and frequency to keep stakeholders informed.
- **Risk and Issue Management:** Integration of risk management practices within the project plan.

## 17. Implementation Project Plan Advisory Report

- **Strategic Recommendations:** Expert advice on structuring the implementation project plan to align with URI's objectives and Workday best practices.
- **Critical Components Guidance:**
  - **Change Management:** Strategies for managing organizational change and promoting user adoption.
  - **Data Migration:** Recommendations on data migration planning and execution.
  - **Testing Strategies:** Guidance on developing comprehensive testing plans, including unit, integration, and user acceptance testing.
  - **Training Programs:** Suggestions for effective training and knowledge transfer to prepare staff.
  - **Post-Go-Live Support:** Planning for post-implementation support and system stabilization.
- **Alignment with Phase 0 Outputs:** Ensuring the implementation plan builds upon findings and decisions made during Phase 0.
- **Stakeholder Collaboration:** Advice on engaging stakeholders in the planning process to foster ownership and commitment.
- **Integration of Best Practices:** Incorporation of industry best practices and lessons learned from similar implementations.

### **Additional Notes:**

- **Increased Detail and Customization:** Each deliverable is tailored to address URI's specific needs, challenges, and organizational context, providing actionable insights and practical solutions.
- **Visual Aids and Documentation:** The deliverables include visual representations and comprehensive documentation to facilitate understanding and support decision-making among diverse stakeholders.
- **Alignment with Institutional Goals:** All deliverables are designed to align with URI's strategic priorities and to support the transformation into a modern, efficient, and fully engaged institution.
- **Focus on Readiness and Gap Closure:** Emphasis is placed on not only identifying gaps but also actively assisting URI in planning and executing the necessary steps to close them before the implementation phase.
- **Support for Implementation Planning:** The vendor provides both the Phase 0 project plan and expert advisory services to ensure the subsequent implementation phase is well-planned, strategically aligned, and poised for success.

### **Phase 0 Success Metrics**

The vendor should propose success metrics against which the success of Phase 0 and their performance will be evaluated.

### **Implementation Phase: Quality Assurance and Advisory Role**

Following Phase 0, URI will proceed with the implementation of Workday. If the Workday Launch methodology is confirmed feasible, Workday itself will act as the System Integrator (SI). If not, the vendor will assist URI in pivoting to an alternative methodology and selecting an appropriate SI.

### **Key Responsibilities**

During the Implementation Phase, the vendor will:

#### **1. Act as a Trusted Advisor**

- **Review Contracts and Key Documents:**  
Evaluate all contracts, statements of work (SOWs), and other critical project documents. Provide expert advice on how these documents compare to others in the industry, their alignment with industry standards, and whether they sufficiently protect URI's interests. Identify potential gaps, ambiguities, or risks and recommend revisions to ensure clarity, enforceability, and alignment with project objectives.
- **Evaluate Third-Party Performance:**  
Continuously assess the performance of all third-party vendors, including Workday, system integrators (SIs), staffing augmentation firms, and other service providers. Provide objective feedback on vendor adherence to project timelines, quality of deliverables, and overall contribution to project success. Step in with expert guidance to address and rectify performance issues, ensuring all parties remain accountable and aligned with URI's expectations.
- **Maximize Value and Identify Savings:**  
Ensure URI receives the full value from all third-party contracts, including all credits, discounts, or incentives specified in agreements. Identify opportunities to save costs, optimize resources, and reduce project timelines without compromising quality. Advise on innovative approaches to enhance project efficiency and return on investment.

#### **2. Monitor and Enhance Staff Engagement and Performance**

- **Engagement Monitoring:**  
Regularly assess staff engagement, fatigue, and morale through surveys, one-on-one check-ins, and team feedback sessions.
  - **Fatigue Mitigation:**  
Identify early signs of fatigue or burnout and recommend strategies to reallocate workloads, adjust timelines, or introduce support mechanisms.
  - **Performance Enhancement:**  
Provide strategies to keep staff motivated, energized, and performing at their best throughout the project.
  - **Culture of Excitement:**  
Help URI foster a culture of excitement and enthusiasm around the project by celebrating milestones, sharing successes, and reinforcing the project's alignment with URI's broader mission and goals.
3. **Provide Independent Quality Assurance Services**
    - **Strategic Oversight:** Deliver ongoing quality assurance services, ensuring all project activities align with URI's objectives and adhere to Workday best practices.
    - **Standards Compliance:** Validate that deliverables meet defined quality standards and that project milestones are achieved on time and within scope.
  4. **Support in Selecting a System Integrator (If Necessary)**
    - **Selection Process:** Assist URI in evaluating and selecting a suitable system integrator (SI) if the Workday Launch methodology is deemed infeasible.
    - **Proposal Review:** Review proposals and assess vendor capabilities, offering recommendations based on URI's specific needs and goals.
  5. **Provide Project Management Oversight**
    - **Progress Monitoring:** Track project timelines, milestones, and objectives to ensure adherence to schedules and plans.
    - **Risk Identification:** Identify risks to project delivery and recommend mitigation strategies to keep the project on track.
    - **Resource Optimization:** Ensure effective utilization of resources to avoid delays or budget overruns.
  6. **Review Technical and Solution Architecture**
    - **Technical Assessment:** Assess the proposed technical and solution architecture from the SI or Workday.
    - **Optimization Guidance:** Recommend improvements to enhance system performance, scalability, and alignment with URI's operational needs.
  7. **Oversee Testing Strategies and Execution**
    - **Testing Plans:** Review and provide feedback on testing strategies, including unit, integration, and user acceptance testing (UAT).
    - **Quality Assurance:** Ensure all testing activities thoroughly validate system functionality and meet user requirements.
    - **Issue Resolution:** Monitor defect resolution processes to ensure timely fixes.
  8. **Advise on Data Conversion and Integration Plans**

- **Migration Strategy:** Provide expert guidance on data migration methodologies to ensure data integrity and accuracy.
- **Integration Review:** Evaluate system integration plans to confirm seamless connectivity between Workday and existing systems.

#### 9. **Support Organizational Change Management**

- **Change Strategy:** Advise on change management strategies to facilitate smooth adoption of Workday by URI stakeholders.
- **Engagement and Communication:** Ensure communication plans effectively inform stakeholders of changes and prepare them for implementation.
- **Training Programs:** Guide the development of comprehensive training initiatives to equip users with the necessary skills and knowledge.

#### 10. **Assist with Release Management and Production Support Planning**

- **Release Planning:** Help design processes for managing Workday releases, including testing, deployment, and updates.
- **Post-Go-Live Support:** Develop a plan to ensure robust support mechanisms are in place for issue resolution and ongoing maintenance.

#### 11. **Participate in Key Decision-Making**

- **Decision Framework:** Actively contribute to URI's decision-making framework alongside leadership and the SI.
- **Independent Oversight:** Offer an unbiased perspective to ensure decisions are balanced, informed, and aligned with project objectives.

#### 12. **Foster a Culture of Continuous Improvement**

- **Innovation Encouragement:** Promote practices that encourage collaboration, creativity, and adaptability among stakeholders.
- **Ongoing Optimization:** Identify opportunities for iterative improvements throughout the implementation and post-go-live phases.
- **Stakeholder Engagement:** Maintain stakeholder enthusiasm and commitment by highlighting progress and celebrating achievements.

### **Implementation Phase Deliverables**

During the Implementation Phase, the vendor will provide various documents and reports.

Examples may include:

#### **1. Trusted Advisor Reports and Recommendations**

- **Contracts and Key Documents Review Report**
- **Third-Party Performance Evaluation Reports**
- **Value Optimization and Savings Opportunities Report**

#### **2. Staff Engagement and Performance Enhancement Plan**

- **Staff Engagement Monitoring Reports**
- **Staff Well-being and Retention Strategies**
- **Culture Building Initiatives**

#### **3. Quality Assurance (QA) Reports**

- **Quality Management Plan**
  - **Periodic QA Assessment Reports**
  - **Final QA Summary Report**
- 4. System Integrator (SI) Selection Support Documents (If Necessary)**
- **SI Evaluation Criteria and Scoring Matrix**
  - **SI Assessment Reports**
- 5. Project Management Oversight Reports**
- **Project Status Reports**
  - **Risk and Issue Management Reports**
- 6. Technical and Solution Architecture Review Documents**
- **Architecture Assessment Report**
  - **Optimization Recommendations**
- 7. Testing Strategy and Execution Oversight Documents**
- **Testing Strategy Review**
  - **Testing Progress Reports**
  - **User Acceptance Testing (UAT) Support**
- 8. Data Conversion and Integration Advisory Reports**
- **Data Migration Assessment**
  - **Integration Strategy Review**
  - **Data Integrity Verification**
- 9. Organizational Change Management Support Materials**
- **Change Management Strategy Document**
  - **Communication Plan**
  - **Training Plan Review**
- 10. Release Management and Production Support Plans**
- **Release Management Strategy**
  - **Production Support Plan**
- 11. Decision-Making Framework Documentation**
- **Decision Logs**
  - **Advisory Memoranda**
- 12. Continuous Improvement Plans**
- **Continuous Improvement Strategy Document**
  - **Improvement Implementation Plans**
- 13. Staff Engagement and Performance Reports**
- **Engagement Monitoring Reports**

- **Performance Enhancement Recommendations**
- **Culture Building Plans**

#### 14. Monthly and Quarterly Executive Summaries

- **Comprehensive Overviews**
- **Strategic Alignment Reports**

#### Additional Notes:

- **Documentation Standards:** All deliverables will adhere to professional documentation standards, ensuring clarity, accuracy, and usability by various stakeholders. Documents will be formatted for easy reference, with executive summaries, tables of contents, and appendices as appropriate.
- **Visual Aids and Presentations:** Where beneficial, deliverables will include visual elements such as charts, diagrams, infographics, and slide decks to facilitate understanding and engagement.
- **Regular Communication and Collaboration:** The vendor will maintain open lines of communication with URI's project team, participating in regular meetings, workshops, and collaborative sessions to discuss findings, gather feedback, and adjust plans as needed.
- **Customization to URI's Needs:** All deliverables will be tailored to URI's specific context, challenges, and objectives, ensuring relevance and practicality.
- **Knowledge Transfer:** The vendor will ensure that URI's staff are fully informed and capable of utilizing the deliverables effectively, providing explanations, training, or walkthroughs as necessary.

#### **Implementation Phase Success Metrics**

The vendor should propose success metrics for the Implementation Phase

#### **Resource Requirements**

Resource demands will vary based on the implementation approach. The vendor is expected to provide advisory services and oversight throughout the project, estimating effort and staffing accordingly. URI anticipates the vendor will:

- **Provide Experienced Staff:** Assign qualified personnel with relevant expertise to each task.
- **Manage Resource Constraints:** Consider URI's resource limitations, including the 35-hour workweek and unionized environment.
- **Assist in Gap Closure Activities:** Guide and advise URI in executing activities to close readiness gaps before implementation kickoff.

#### **Important Note on Vendor Scope**

The vendor's engagement is strictly limited to the strategic advisory and quality assurance services described in this RFP. The vendor will **not** be involved in any hands-on implementation activities such as system integration, data ETL, or staffing augmentation.

### **SECTION 4: PROPOSAL**

#### **A. Technical Proposal**

URI will establish a technical review committee (TRC) to evaluate submitted vendor proposals related to this RFP. The proposals will be evaluated by the TRC in two stages. In Stage 1, the TEC will evaluate the written proposals. Proposals that meet the minimum scoring threshold for Stage 1

(described further below) will advance to Stage 2. In Stage 2, URI will require selected vendors to provide a presentation/demonstration of their proposed system. Stage 2 will be evaluated accordingly.

Narrative and format: The proposal should address specifically each of the following elements:

1. **Qualifications – Objective:** Assess the expertise and experience of the vendor's team members who will directly contribute to the project.

#### **Appendix B (MUST EXCLUDE COST)**

Vendors must complete the Appendix B **Hours Estimate Template** by providing role-specific hours for each deliverable, covering both Phase 0 and the Implementation Phase. For each deliverable, list the roles involved (e.g., Project Manager, Developer) and allocate the estimated hours for each role, ensuring the totals align with the deliverable's complexity. Vendors may add or remove rows as needed to reflect their staffing mix and model. Justify all estimates based on scope and dependencies. The hours estimate should **exclude cost information**, which will be submitted separately. Ensure the template structure is maintained for consistency and evaluation purposes.

#### **Requirements:**

- **Resumes/CVs of Key Staff:**
  - Provide detailed resumes or curricula vitae for each key staff member proposed for the project.
  - Include educational background, professional certifications, and relevant work experience.
- **Relevant Experience:**
  - Highlight each team member's experience in conducting readiness assessments, fit-gap analyses, and closing readiness gaps for Workday implementations in higher education.
  - Emphasize experience in evaluating the feasibility of the Workday Launch methodology and advising on alternative approaches if necessary.
- **Roles and Responsibilities:**
  - Clearly define the role and responsibilities of each key staff member in this project.
  - Indicate the percentage of time everyone will dedicate to the project.

#### **Evaluation Criteria:**

- Depth and relevance of experience in similar projects.
- Qualifications and expertise aligning with the project's needs.
- Clarity in defining roles and commitment levels.

2. **Capability, Capacity, and Qualifications of the Offeror -Objective:** Evaluate the vendor's overall ability to deliver the requested services effectively.

#### **Requirements:**

- **Company Overview:**
  - Provide a brief history of your organization, including years in business, areas of expertise, and size of the company.
  - Provide information about the stability and solvency of your organization.

- Provide information about your organization’s risk management and business continuity plans.
- **Experience with Similar Projects:**
  - Describe your experience in providing independent strategic advisory and quality assurance services for Workday implementations, specifically in higher education.
  - Include examples of past projects where you assisted in readiness assessments, gap closure, and implementation oversight.
- **Client References:**
  - Provide at least three (3) relevant client references.
  - Include the following information for each reference:
    - Client name and address.
    - Contact person’s name, title, phone number, and email address.
    - Dates of service.
    - Description of the services provided, and outcomes achieved.
- **Certifications and Recognitions:**
  - List any relevant certifications, partnerships, or industry recognitions that demonstrate your expertise in ERP advisory services.
- **Independence from Implementation Activities:**
  - Confirm that your organization does not provide system integration, data ETL, or staffing services related to Workday implementations.
  - Describe how you maintain independence to provide unbiased advisory services.

**Evaluation Criteria:**

- Demonstrated experience and success in similar projects.
- Positive feedback from client references.
- Ability to provide independent and objective advisory services.
- Organizational capacity to support the project's scope and timeline.

**3. Work Plan Objective:** Assess the vendor's ability to plan and manage the project effectively, including addressing readiness shortcomings and closing requisite gaps before the implementation phase kickoff.

**Requirements:**

- **Detailed Project Schedule:**
  - Provide a comprehensive project schedule outlining tasks, subtasks, activities, milestones, and deliverables for both Phase 0 and the Implementation Phase.
  - Include estimated start and end dates for each task.
- **Resource Allocation:**
  - Assign staff members to each task, specifying their roles and responsibilities.
  - Indicate the percentage of effort each team member will contribute to their assigned tasks.
- **Approach to Resource Constraints:**
  - Describe how you will manage resources to meet project deadlines, considering URI's resource limitations and unique operational context (e.g., 35-hour workweek, unionized environment).
- **Timeline for Assessment and Readiness Activities:**
  - Provide a proposed timeline distinguishing between assessment activities and readiness/preparation activities (e.g., closing identified gaps).
  - Explain how readiness activities can commence concurrently with the assessment phase where appropriate.

- **Deliverables List:**
  - Provide a detailed description of all proposed deliverables.
- **Success Metrics:**
  - Provide a detailed description of all success metrics.

**Evaluation Criteria:**

- Clarity and feasibility of the project schedule.
- Alignment of the work plan with project objectives and timelines.
- Effective allocation of resources and staffing.
- Consideration of URI's specific constraints and needs.

**4. Approach/Methodology - Objective:** Evaluate the vendor's understanding of URI's requirements and the soundness of their proposed approach to meeting project goals, including closing readiness gaps.

**Requirements:**

- **Understanding of Requirements:**
  - Demonstrate your understanding of URI's goals, challenges, and expectations for this project.
  - Discuss the importance of adopting Workday Launch as the preferred methodology and the need for readiness assessments to ensure its feasibility.
- **Methodology for Each Task:**
  - Describe your proposed approach for each specific activity and task outlined in the Scope of Work.
  - Explain how you will assess the feasibility of the Workday Launch methodology and, if necessary, recommend and assist in pivoting to alternative methods.
  - Detail your methods for conducting the readiness assessment, fit-gap analysis, and readiness activities to close gaps.
- **Addressing Readiness Shortcomings:**
  - Outline your strategy for helping URI address any readiness shortcomings identified.
  - Describe how you will operationalize findings and guide URI in closing requisite gaps before implementation kickoff.
- **Stakeholder Engagement:**
  - Outline your strategy for engaging with URI stakeholders, including methods for communication, feedback collection, and addressing concerns.
  - Describe how you will capture and incorporate stakeholder needs into your deliverables, including the creation of visual stakeholder maps.
- **Risk Mitigation Strategies:**
  - Identify potential technical and organizational challenges that may arise at each project stage.
  - Propose strategies for mitigating identified risks, including resource, change management, and readiness risks.
- **Success Metrics:**
  - Explain how you will measure success for both Phase 0 and the Implementation Phase.
  - Reference the proposed success metrics provided in the Scope of Work and describe how you will achieve and report on these metrics.
- **Knowledge Transfer and Training:**
  - Describe your approach to knowledge transfer, ensuring that URI staff are prepared for post-implementation operations.
  - Include any proposed training or coaching activities to support organizational readiness.

## **Evaluation Criteria:**

- Depth of understanding of URI's requirements and objectives.
- Soundness and feasibility of the proposed methodology.
- Effectiveness of strategies to address readiness shortcomings and close gaps.
- Effectiveness of stakeholder engagement and communication plans.
- Robustness of risk mitigation strategies.
- Alignment with URI's strategic goals and cultural considerations.

## **B. Cost Proposal**

Provide a proposal cost proposal using Appendix C to include the following requirements:

Vendors must complete the Cost Estimate Template- Appendix C, by detailing role-specific costs for each deliverable, including hourly rates, estimated hours, and total costs for both Phase 0 and the Implementation Phase. The cost estimate must align with the separate Hours Estimate Template, ensuring consistency in roles and hours. All fields must be fully populated, with justifications provided for any minimal or zero hour allocations. **Vendors are responsible for verifying the accuracy of all calculations and maintaining the original template format without modifications.**

## **C. ISBE Proposal**

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

## **SECTION 5: EVALUATION AND SELECTION**

Proposals will be reviewed by a Technical Review Committee (“TRC”) comprised of staff from URI/State Agencies. The TRC first shall consider technical proposals.

The evaluation of Technical Proposals will be split into two phases, the first phase will be the review and scoring of the Written Technical Proposal by the TRC, the second phase will be the scoring of the Presentation and Demonstration of the Product and/or Services offered.

In Phase 1, the TRC will score submitted written proposals. Proposals that meet or exceed a minimum threshold of 30 out of a maximum of 40 points to advance to the cost evaluation phase. Any technical proposals scoring less than 30 points shall be disqualified.

In Phase 2, URI will require selected vendors to schedule a presentation/demonstration with the TRC and score the product and/or services accordingly.

Following the scoring of Phase 2, points for Phase 1 and 2 will be combined. Technical proposals scoring 50 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The University of Rhode Island reserves the right to select the vendor(s) or firm(s) (“vendor”) that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

<b>Criteria</b>	<b>Possible Points</b>
<b>Phase 1: Evaluation of the Written Proposal</b>	
Qualifications of Key Personnel	10 Points
Capability, Capacity, and Qualifications of the Offeror	15 Points
Work Plan and Project Schedule	5 Points
Approach and Methodology	10 Points
<b>Total Possible points for Phase 1</b>	<b>40 Points</b>
<b>Phase 2: Presentation and Demonstration</b>	
Demonstration of Technical and Functional aspects of the system	30 Points
<b>Total Possible Technical Points</b>	<b>70 Points</b>
Cost proposal*	30 Points
<b>Total Possible Evaluation Points</b>	<b>100 Points</b>
ISBE Participation**	6 Bonus Points
<b>Total Possible Points</b>	<b>106 Points</b>

**\* Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

**\*\*ISBE Participation Evaluation:**

**A. Calculation of ISBE Participation Rate**

1. **ISBE Participation Rate for Non-ISBE Vendors.** The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example, if the non-ISBE's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.
2. **ISBE Participation Rate for ISBE Vendors.** The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example if the ISBE vendor's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the ISBE vendor's ISBE participation rate would be 20%.

**B. Points for ISBE Participation Rate:**

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$\begin{aligned} & (\text{Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate} \\ & \quad \times \text{Maximum ISBE participation points}) \end{aligned}$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive  $(12\% \div 20\%) \times 6$  which equals 3.6 points.

**General Evaluation:**




Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in the proposal.

## **SECTION 6: QUESTIONS**

Questions concerning this solicitation may be e-mailed to the University of Rhode Island Purchasing Department at [URIPurchasing@uri.edu](mailto:URIPurchasing@uri.edu) no later than the time and date indicated on page 1 of this solicitation. Please reference the reference **RFP Number # indicated on the cover sheet** on all correspondence. Questions should be submitted in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

## **SECTION 7: PROPOSAL CONTENTS**

A. Proposals shall include the following:

1. One completed and signed **URI Bidder Certification Cover Form** (include in the Technical Proposal Original copy only). *Do not include in the Technical Proposal copies or Cost proposals.*
2.  **Technical Proposal** - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal should be limited to six (6) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
  - a. One (1) Electronic copy on a CD-R or USB, marked "Technical Proposal - Original".
  - b. One (1) printed paper copy, marked "Technical Proposal -Original" and signed.
3.  **Cost Proposal** - A *separate*, signed and sealed cost proposal reflecting the hourly rate, or other fee structure, proposed to complete all the requirements of this project.
  - a. One (1) Electronic copy on a CD-R or USB, marked "Cost Proposal - Original".
  - b. One (1) printed paper copy, marked "Cost Proposal -Original" and signed.
4.  **ISBE Proposal** – A *separate*, signed and sealed Appendix A MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. **Do not include any copies in the Technical proposals.**

B. Formatting of proposal response contents should consist of the following:

1. Formatting of CD-Rs or USBs – Separate CD-Rs or USBs are required for the technical proposal and cost proposal. All CD-Rs and USBs submitted must be labeled with:
  - a. Vendor’s name
  - b. RFP #
  - c. RFP Title
  - d. Proposal type (e.g., technical proposal or cost proposal)
  - e. If file sizes require more than one CD-R or USB, multiple CD-Rs or USBs are acceptable. Each CD-R or USB must include the above labeling and additional labeling of how many CD-Rs or USBs should be accounted for (e.g., 3 CD-Rs or USBs are submitted for a technical proposal and each CD-R or USB should have additional label of ‘1 of 3’ on first CD-R or USB, ‘2 of 3’ on second CD-R or USB ‘3 of 3’ etc.).

Vendors are responsible for testing their CD-Rs or USBs before submission as the URI Purchasing Department’s inability to open or read a CD-R or USB may be grounds for rejection of a vendor’s proposal. All files should be readable and readily accessible on the CD-Rs, or USBs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the URI Purchasing Department may consider it “non-responsive”. Please note that CD-Rs and USBs submitted, shall not be returned.

2. Formatting of written documents and printed copies:
  - a. For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1” margins on white 8.5”x 11” paper using a font of 12-point Calibri or 12 point Times New Roman.
  - b. All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor’s name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
  - c. The cost proposal shall be typed using the formatting provided on the provided template- Appendix C.
  - d. **Printed copies are to be only bound with removable binder clips.**

## SECTION 8: PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of Rhode Island Purchasing Department, shall not be accepted.

Responses should be mailed or hand-delivered in a sealed envelope marked "RFP # (as indicated on the cover sheet) to

MAIL TO:

UNIVERSITY OF RHODE ISLAND  
PO BOX 1773  
PURCHASING DEPARTMENT  
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND  
PURCHASING DEPARTMENT, 1<sup>st</sup> Floor  
210 FLAGG ROAD  
KINGSTON, RI 02881-2010

**NOTE:** Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations, or which are otherwise not presented in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The "official" time clock is located in the reception area of the URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

## SECTION 9: CONCLUDING STATEMENTS

Notwithstanding the above, the University of Rhode Island reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award it in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The University may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the University of Rhode Island Purchasing Department.

The General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded for this RFP and can be found in the attached Bidder Certification Form.

## **APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM**

### **A. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)**

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

### **B. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:**

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS  
DEPARTMENT OF ADMINISTRATION  
ONE CAPITOL HILL PROVIDENCE,  
RHODE ISLAND 02908**

**MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN**

Bidder's Name:

Bidder's Address:

Point of Contact:

Telephone:

Email:

Solicitation No.:

Project Name:

This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. **Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.**

Name of Subcontractor/Supplier:

Type of RI Certification:     MBE     WBE     Disability Business Enterprise

Address:

Point of Contact:

Telephone:

Email:

Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:

Total Contract Value (\$):

Subcontract Value (\$):

ISBE Participation Rate (%):

Anticipated Date of Performance:

I certify under penalty of perjury that the forgoing statements are true and correct.

**Prime Contractor/Vendor Signature**

**Title**

**Date**

**Subcontractor/Supplier Signature**

**Title**

**Date**

<b>Workday SAQAS</b>	
<b>1. Vendor Information</b>	
<b>Field</b>	<b>Details</b>
Vendor Name	
Contact Name	
Contact Email	
Contact Phone	

Phase 0: Pre-Implementation		
<b>Role</b>	<b>1. Readiness Assessment Report</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>2. Gap Closure Plan</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>3. Fit-Gap Analysis Report</b>	
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>4. Project Governance Framework Document</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>5. Data Governance and Preparation Strategy</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
	<b>6. Business Process Standardization Plan</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-

<b>Role</b>	<b>7. Integration Landscape Review Report</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>8. Chart of Accounts (COA) Optimization Report</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>9. Supervisory Organizational Structure Report</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>10. Workforce Readiness and Staffing Plan</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>11. Technology Infrastructure and Security Assessment</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>12. Initial Project Milestones and Timeline</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>13. Risk Management Framework</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	

2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>14. Compliance and Data Privacy Review</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>15. Initial Success Metrics and Benchmarking Goals</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>16. Phase 0 Project Plan</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>17. Implementation Project Plan Advisory Report</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-

<b>Implementation Phase</b>		
<b>Role</b>	<b>1. Trusted Advisor Reports and Recommendations</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>2. Staff Engagement and Performance Enhancement Plan</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>3. Quality Assurance (QA) Reports</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>4. System Integrator (SI) Selection Support Documents (If N</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>5. Project Management Oversight Reports</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>6. Technical and Solution Architecture Review Documents</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-

<b>Role</b>	<b>7. Testing Strategy and Execution Oversight Documents</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>8. Data Conversion and Integration Advisory Reports</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>9. Organizational Change Management Support Materials</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>10. Release Management and Production Support Plans</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>11. Decision-Making Framework Documentation</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>12. Continuous Improvement Plans</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>13. Staff Engagement and Performance Reports</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	

2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-
<b>Role</b>	<b>14. Monthly and Quarterly Executive Summaries</b>	<b># Hours</b>
1	Enter Role Title Here or Leave Blank	
2	Enter Role Title Here or Leave Blank	
3	Enter Role Title Here or Leave Blank	
4	Enter Role Title Here or Leave Blank	
5	Enter Role Title Here or Leave Blank	
	<b>Total</b>	-

**APPENDIX C**  
**RFP 101443- WORKDAY STRATEGIC ADVISORY & QUALITY ASSURANCE SERVICES (SAQAS)**  
**COST PROPOSAL TEMPLATE**

1. Vendor Information	
Field	Details
Vendor Name	
Contact Name	
Contact Email	
Contact Phone	

2. LUMP SUM		
PHASE	# Hours	Total Cost
Phase 0		\$
Implementation Phase		\$
Travel		\$
GRAND TOTAL		\$

**APPENDIX C- PHASE Phase 0: Pre-Implementation**  
**RFP 101443- WORKDAY STRATEGIC ADVISORY & QUALITY ASSURANCE SERVICES (SAQAS)**  
**COST PROPOSAL TEMPATE**

**Include itemized costs estimates for each of the deliverables. Enter the Role/Title/or Leave Blank under each Sections (1-17)**

<b>Phase 0: Pre-Implementation</b>				
<b>Role</b>	<b>1. Readiness Assessment Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>2. Gap Closure Plan</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>3. Fit-Gap Analysis Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>4. Project Governance Framework Document</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>5. Data Governance and Preparation Strategy</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>6. Business Process Standardization Plan</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>7. Integration Landscape Review Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				

4				
5				
<b>Total</b>				
<b>Role</b>	<b>8. Chart of Accounts (COA) Optimization Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>9. Supervisory Organizational Structure Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>10. Workforce Readiness and Staffing Plan</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>11. Technology Infrastructure and Security Assessment</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>12. Initial Project Milestones and Timeline</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>13. Risk Management Framework</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>14. Compliance and Data Privacy Review</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>15. Initial Success Metrics and Benchmarking Goals</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				

3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>16. Phase 0 Project Plan</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
<b>Role</b>	<b>17. Implementation Project Plan Advisory Report</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
<b>Total</b>				
		<b>\$/Hour</b>	<b># Hours</b>	
<b>Phase 0: Pre-Implementation GRAND TOTAL</b>				

*\*Total number of cost per hour and total hours must be provided on the lump sum table on page one of Appendix C.*

**APPENDIX C- Implementation Phase  
RFP 101443- WORKDAY STRATEGIC ADVISORY & QUALITY ASSURANCE SERVICES (SAQAS)  
COST PROPOSAL TEMPATE**

**Include itemized costs estimates for each of the deliverables. Enter the Role/Title/ or Leave Blank under each Sections (1-14)**

<b>Implementation Phase</b>				
<b>Role</b>	<b>1. Trusted Advisor Reports and Recommendations</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>2. Staff Engagement and Performance Enhancement Plan</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>3. Quality Assurance (QA) Reports</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>4. System Integrator (SI) Selection Support Documents (If Necessary)</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>5. Project Management Oversight Reports</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>6. Technical and Solution Architecture Review Documents</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>7. Testing Strategy and Execution Oversight Documents</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
	<b>Total</b>			
<b>Role</b>	<b>8. Data Conversion and Integration Advisory Reports</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				

		Total		
<b>Role</b>	<b>9. Organizational Change Management Support Materials</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
		Total		
<b>Role</b>	<b>10. Release Management and Production Support Plans</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
		Total		
<b>Role</b>	<b>11. Decision-Making Framework Documentation</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
		Total		
<b>Role</b>	<b>12. Continuous Improvement Plans</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
		Total		
<b>Role</b>	<b>13. Staff Engagement and Performance Reports</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
5				
		Total		
<b>Role</b>	<b>14. Monthly and Quarterly Executive Summaries</b>	<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
1				
2				
3				
4				
		Total		
		<b>\$/Hour</b>	<b># Hours</b>	<b>Total</b>
<b>Implementation Phase- GRAND TOTAL</b>				

*\*Total number of cost per hour and total hours must be provided on the lump sum table on page one of Appendix C.*