

a	<h1>Request for Qualifications</h1>
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Proposal Title: **PeopleSoft Development, System Administration and Database Administration Services**

Proposal Description: KUB seeks professional services for PeopleSoft development, system administration and database administration resources

Proposal Number: **948**

Date Issued: June 22, 2017

Response Due Date: July 20, 2017

Time: 2:00PM EST

KUB Contact: Rebekah Taylor

Phone Number: (865) 558-2307

E-mail address: Rebekah.taylor@kub.org

The Knoxville Utilities Board will receive Qualifications in an electronic format sent to the Procurement Department, as instructed below.

Subject to the instructions, conditions, specifications, Addenda, and any other elements of this Request for Qualifications, including those incorporated by reference.

This Request for Qualifications is prepared in a Microsoft Word Format. Any alterations to this document made by the Proposer may be grounds for rejection of the Proposal, cancellation of any subsequent award, or any other legal remedies available to the Knoxville Utilities Board.

Submit Qualification responses to:

E-mail the Qualifications response to bids@kub.org with “**(948 PeopleSoft Resources)**” in subject line by 2:00pm Knoxville, TN EST by the July 20, 2017 date referenced in section II.

Note: Proposer will receive an auto response within a reasonable time frame; otherwise please follow-up with Rebekah Taylor 865-558-2307 and/or re-send your response.

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I. Statement of Intent

The Knoxville Utilities Board (KUB), located in Knoxville, Tennessee, is requesting qualification firms, companies, and individuals to provide a proposal for professional services to assist with development, system administration and database administration in the following applications at KUB:

PeopleSoft Applications

PeopleSoft HRMS 9.2

PeopleSoft ELM 9.2

PeopleSoft Candidate Gateway 9.2

PeopleSoft FMS 9.2

PeopleSoft People tools 8.54

PeopleSoft PeopleTools 8.49

PeopleSoft CIS system that was written in PeopleTools

Hyperion 11.1

Development types that could be needed:

COBOL

SQR

PeopleCode

Application Engine

Application Packages

PeopleTools

Hyperion Calculations

Maxl

System and database administration

IX 6.1 (Supported virtualization)

Oracle Weblogic (64-bit application)

PeopleTools Version 8.49 (64-bit, standard web integration)

PeopleTools Version 8.54

Oracle 11g

Oracle 12c

KUB would like to supplement their PeopleSoft development, system administration and database administration staff with contractors when needed. This would include new development and upgrades to current PeopleSoft applications. KUB will provide secure connections to KUB's resources for the contractors. Contractors may be required to work on-site at times on an assignment; most work can be performed off-site.

KUB provides four utility services in the Knoxville, Tennessee region. KUB serves approximately 197,000 electric customers, 98,000 gas customers, 78,000 water customers, and 69,000 wastewater customers. KUB has approximately 965

employees which includes a very diverse workforce (field, administrative and professional personnel).

Most of KUB's processes are similar to other industries and/or organizations.

KUB expects to use a variety of reporting tools native to PeopleSoft including query, delivered BI Publisher reports, pivot grids and NVision. However, KUB will also use Crystal Reports where appropriate.

KUB upgraded to PeopleSoft 9.2 HCM (PeopleTools 8.54) and PeopleSoft 9.2 FMS (PeopleTools 8.54) in 2015. The current modules and technical environment are listed below:

- Oracle PeopleSoft HRMS

Payroll for North America	Benefits Administration
Human Resources	ePerformance
Time and Labor	Enterprise Learning Management
eCompensation	Recruiting Solutions

- Oracle Version- Oracle 12c
- PeopleTools Version- 8.54

- Oracle PeopleSoft FMS 9.2

Accounts Payable	Accounts Receivable
Asset Management	General Ledger
Procurement	Cash Management
Supply Chain Management	Contract Management
Deal Management	

- Oracle Version- Oracle 12c
- PeopleTools Version – 8.54

KUB upgraded to PeopleSoft CIS hardware and software in 2017. The current modules and technical environment are listed below:

- Oracle PeopleSoft CIS 8.9

Customer Information	Financial Information
Credit and Collections	Field Information
Assets	Meter Reads

- Oracle Version- Oracle 11g
- PeopleTools Version – 8.49

- Oracle Hyperion 11.1

Planning	
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- Oracle Version- Oracle 12c

○ Essbase 11.1

The scope of the work includes solution development, configuration, system administration, database administration and custom programming, including testing and deployment of new functionality within PeopleSoft applications to meet KUB's process needs.

I. RFQ Tentative Timeline:

RFQ Issue Date	July 3, 2017
Cutoff for Questions	July 12, 2017
Answers to Questions	July 14, 2017
RFQ Close Date (all proposals due)	July 21, 2017

II. RFQ Response Requirements:

- 1) Read the RFQ in its entirety.
- 2) Submit all questions by email to rebekah.taylor@kub.org before the "Cutoff for Questions" deadline stated in section II of this RFQ.
- 3) Email qualifications to bids@kub.org
- 4) Submit a complete and detailed proposal, organized as follows:
 - a. Cover Letter
 - b. Executive Summary
 - Provide a brief summary that highlights the key components of the proposal in one to three pages.
 - c. Functional Element Experience and Requirements
 - Provide an acknowledgement and brief description of previous experience to successfully develop solutions and perform system and database administration in the PeopleSoft framework.
 - d. Proposer's Personnel

KUB's normal working hours are 8 a.m. until 5 p.m., Monday through Friday.

KUB prefers proposer's core team members to have availability to come on-site as needed at certain pivotal points of the project or task.

 - Describe the qualifications and experience of typical staff members who are recommended for PeopleSoft development, system administration and database administration. Proposers are encouraged to include a profile for proposed staff.
 - Describe the typical work hours and location for proposed staff member.
 - e. KUB's Project Team Personnel

KUB will have functional resources, technical system administrators, database administrators and development staff to assist as needed.
 - f. Exceptions to Terms and Conditions

Proposer must acknowledge and accept the Terms and Conditions or note any exceptions on the “Exceptions to Terms and Conditions” using Attachment B.

g. References

Proposer must provide up to three references with similar requirements as to those described in this RFQ using Attachment C.

h. Contact Information

Proposer must provide primary contact information using Attachment D.

i. Taxpayer Identification

Proposer must provide a copy of a completed W-9 (Request for Taxpayer Identification Number and Certification) or Social Security number for 1099 Reporting.

III. Evaluation Criteria –The RFQ will be evaluated by a team of employees based on the following criteria:

A. Fixed price cost / hourly rate

B. Proposed Vendor’s ability to address KUB’s functional needs as outlined.

Proposed services are expected to meet and/or exceed KUB’s requirements and needs.

- Understand functional and technical documents that outlines development and system administration needs
- Ability to develop in PeopleSoft 8.9 and 9.2
- Ability to create reports using PeopleSoft Query, BI, Crystal
- Ability to communicate with KUB ISD staff and KUB users on processes and testing
- Ability to troubleshoot issues in PeopleSoft
- Ability to perform system administration tasks in the PeopleSoft environment
- Ability to perform database administration tasks in the PeopleSoft Environment
- Ability to understand and develop workflow, work lists and workcenters

C. Qualifications of staff as shown by submitted information and documents.

D. Proposer’s experience and references.

IV. Scope of Work

The development scope of the work includes solution development, configuration and deployment of updated or new functionality within PeopleSoft application to meet KUB’s process needs.

The system administration scope of work include system configuration, troubleshooting system issues, supporting the development needs in the PeopleSoft applications at KUB.

V. Instructions, Terms, and Conditions

- A. Instructions:** These documents constitute the complete set of specifications, requirements, and proposal request instructions. The Proposer is responsible for insuring that all pages and all addenda are received. KUB advises all proposers to closely examine this proposal response, and to immediately direct any questions regarding the completeness of this RFQ and any addenda to the Procurement Department.
- B. Rights:** KUB reserves the right to reject any or all proposals and to waive irregularities therein, and the undersigned hereby agrees that such rejection or waiver shall be without liability on the part of KUB for any damage or claim brought by the undersigned because of such action, nor shall the undersigned seek any recourse of any kind against KUB because of such action. **There is no obligation to buy.** All proposals submitted to KUB become the property of KUB upon submission and after the execution of a contract become subject to Tennessee's Public Records law, as codified in Tenn. Code Ann. §§10-7-101 et. seq.
- C. Request for Qualifications Definitions:** This section describes the procedures for companies submitting a response to this Request for Qualifications (RFQ). The term "Proposer" refers to the person or entity to which a contract is awarded.
- D. Time and Date for Submitting Proposals:** Each Proposer shall respond to this RFQ on or before the time and date indicated on the Request for Qualifications cover sheet. Proposals will not be made available for public inspection until after the RFQ process is completed and a purchase order has been issued. The Proposal shall be delivered by E-mail to: bids@kub.org with subject line **"(482 – PeopleSoft Resources)"**, before 2:00 PM EST on the "RFQ Close Date" referenced in section II.
- E. Response:** Each Proposer must acknowledge that it accepts and understands each of the Instructions, Terms, and Conditions of this RFQ. If a Proposer is unwilling to accept any one or more of the Instructions, Terms, and Conditions, they must clearly identify in their proposal the Instructions, Terms, and Conditions to which they take exception and note it on the enclosed exception sheet. In its sole discretion, KUB reserves the right on a non-discriminatory basis to: a) consider any Proposal(s) which takes exception(s) to any one or more of the Terms and Conditions; or b) reject any Proposal(s) which takes exception(s) to any one or more of the Terms and Conditions.
- F. Ex Parte Communication:** KUB does not permit contact concerning this RFQ process with any KUB personnel other than as identified in the RFQ until the selection process has been completed. All exchanges of information concerning this RFQ must be in writing, with e-mail as the preferred method of communication. Failure to honor this requirement will be viewed negatively in the selection process and may result in the disqualification of the Proposer. Any questions or requests for clarification will be responded to in writing or by email with a copy of the response being sent to each proposer on record.
- G. Agreement:** Each successful Proposer will be required to sign a contract with KUB. The entire agreement shall include the Proposer's response to this proposal, the RFQ, and an agreement (the "Contract Documents"). If the RFQ and the Proposer's response to this proposal are modified in negotiation between KUB and the Proposer, then the modified proposal shall be included as addenda to the successful Proposer's contract with KUB. Should any conflict or discrepancy arise between the

Instructions, Terms, and Conditions of the RFQ and the Instructions, Terms and Conditions of the Agreement, the Instructions, Terms and Conditions of the Agreement shall control. The individual who signs this document must be empowered to sign the Agreement, or if sent by email the name that appears on the proposal response must be empowered to sign the Agreement. KUB reserves the right to withdraw the RFQ or condition the award on additional or different terms proposed to be included in such contract and KUB shall not incur any obligation to the successful Proposer except as provided in the Agreement. To produce the Agreement, KUB reserves the right to provide its own draft contract terms or request draft contract terms from the Proposer. Notification of award of the or acceptance of a RFQ, in whole or in part, shall not restrict KUB's discretion with regard to the terms of the definitive contract, shall not preclude KUB from terminating the proposal or withdrawing the proposal prior to execution of the Agreement, and shall not limit KUB's right to consider and act on additional information that may come to its attention from any source.

- H. Discrepancies, Errors and Omissions:** Any discrepancies, errors, omissions, or ambiguities in this RFQ or the requirements / guidelines or addenda (if any) stated herein should be reported to KUB. At KUB's option, a written addendum may be issued and the addendum will be incorporated in the RFQ and will become part of the Contract Documents. KUB will **not** be responsible for or bound by any oral instructions, clarifications or other communications and no such oral communication may be relied on by any Proposer.
- I. Cancellation:** KUB reserves the right to cancel the agreement without cost or penalty to KUB, if, in KUB's opinion, there is a failure at any time by the Contractor to adequately perform the Agreement, or if there is any attempt to willfully impose upon KUB service workmanship which is, in the opinion of KUB, of an unacceptable quality or time requirements. Cancellation of the Agreement shall not impair any rights or claim of KUB to damages for the breach of any covenants of the Agreement by the successful proposer.
- J. General:** KUB recognizes that the highest price Proposal does not necessarily indicate the best Proposal in terms of capabilities, quality or service. As a result, the selection of a Proposer to which the contract will be awarded will be determined on the basis of which Proposal is in the best interest of KUB based on the factors described in the Proposal Evaluation (Section V.) of this RFQ. KUB reserves the right to reject any or all Proposals, to waive technicalities or informalities and to accept any proposal determined to be in the best interest of KUB. KUB will not be responsible for misinterpretations that are caused by failure of a Proposer to follow the RFQ format or to give proper and specific references when citing referenced material. The selection criteria are described in the RFQ. KUB reserves the right, in its discretion and without incurring any liability to any Proposer, to modify or terminate this RFQ at any time prior to the execution of a definitive contract, and to accept or reject any Proposal for any reason.
- K. Documents:** Each Proposal must include the following documents 1) A fully completed Proposal, including any KUB data sheets or addenda, 2) A signed Exceptions document to Instructions, Terms, and Conditions, attached to Proposal.
- L. Communication:** KUB reserves the right to communicate with the Proposers,

individually or collectively, formally or informally. KUB requires that questions and other communications concerning the RFQ be submitted to KUB only in writing and must be directed to the appropriate person identified on this RFQ cover sheet.

- M. Response Times:** Response times will be made as described in the RFQ. Failure to respond to as specified and in accordance with the Proposal submitted, including promised lead times, will constitute sufficient grounds for cancellation of the contract, and KUB shall incur no cost or penalty for cancellation. All Proposals must include all applicable transportation, service charges, sales and use taxes, assembly, and all other applicable charges.
- N. Minimum Performance:** The services in accordance with this RFQ (including optional items selected by KUB) shall be fully in compliance with all federal, state, and local laws, rules, and regulations.
- O. Guarantee:** In making a Proposal, each Proposer certifies that it is fully aware of the conditions of service and that its offer will meet these requirements of service and purpose to the satisfaction of KUB. Proposer warrants and guarantees to KUB all services and products to be provided and that work and products will be of good quality, and in conformance with the Contract Documents. All work not conforming to these standards may be considered defective by KUB.

P. Insurance Requirements:

Proposer's Insurance: The successful Proposer shall provide KUB with the types and amounts of insurance coverage that the Proposer maintains in its RFQ response. The insurance coverage required by KUB for this project will be mutually agreed upon by KUB and the Proposer before a contract is signed. The successful Proposer shall not allow any subcontractor to commence service on their subcontract until all similar insurance required of the subcontractor has been obtained and approved. All insurance policies shall be with insurers approved and admitted to do business in Tennessee. KUB shall be furnished proof of coverage of insurance by certificates of insurance accompanying the contract documents and shall name KUB as an additional insured as respects commercial general liability and business automobile liability. The successful Proposer shall provide KUB a thirty (30) day cancellation notice in the event any insurance required by fair agreement is canceled.

Employer's Liability Insurance: The successful Proposer shall secure and maintain during the term of the Agreement if applicable, Employer's Liability Insurance.

Worker's Compensation Insurance: The successful Proposer shall secure and maintain during the term of the Agreement if applicable, worker's compensation insurance for all of their employees connected with the work on this project and, in case any work is sublet, shall require the subcontractor similarly to provide worker's compensation insurance for all of the latter's employees unless such employees are covered by the protection afforded by the successful Proposer. Such insurance shall comply fully with Tennessee Worker's Compensation Law. In case any class of employees engaged in hazardous work under this contract at the site of the project is not protected under the Worker's Compensation Statute, the successful Proposer shall provide, and cause each Subcontractor to provide, adequate insurance satisfactory to KUB, for protection of their employees not otherwise protected.

- Q. Indemnification Rider:** The successful Proposer agrees to indemnify and hold

- harmless KUB, its agents, or employees from and against all loss or expense (including cost and attorney's fees) by reason of liability for damages because of bodily injury, including death, at any time resulting there from, sustained by any person or persons or damage to property, including loss of use thereof, arising out of or in consequences of the performance under the Agreement to be entered into whether such injuries to persons or damage to property is due or claimed to be done due to the negligence of the Proposer, his/her subcontractor, KUB, their agents or employees, except only such injury or damage as shall have been occasioned by the sole negligence of KUB. Compliance with the foregoing requirements shall not relieve the Proposer of its liability and obligations under this section or under any other portion of the contract. Proposers regulated by the Tennessee Regulatory Authority or other regulatory authority are required to respond by stating what provisions of their tariff satisfy the requirements of this paragraph.
- R. Taxes:** All taxes of any nature arising out of or in connection with the work above shall be the responsibility of the successful Proposer.
- S. Nondiscrimination:** KUB is an equal opportunity employer and as such requires that its suppliers not discriminate on the basis of race, color, sex, religion, or ethnic origin. Submitting a RFQ constitutes Proposer's acknowledgement of this provision. KUB encourages the use of small business, minority, and women owned business enterprises.
- T. Title VI:** Proposer shall comply with the requirements of all federal statutes relating to nondiscrimination, including but not limited to, Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color, sex, or national origin ("Title VI"). No person on the grounds of race, color, or national origin shall be excluded from participation in, denied benefits of, or be otherwise subject to discrimination in the performance of the proposal. The proposer if awarded the proposal shall upon request, show proof of such nondiscrimination.
- U. Damages:** The proposer will be responsible for any damages to property of KUB or others caused by it, its employees, or sub-suppliers, and will replace and make good such damages to the satisfaction of KUB.
- V. Choice of Law:** This proposal and any subsequent contract or agreement related to this proposal shall be governed by and construed with the Laws of the State of Tennessee.
- W. Statutory Disqualification:** By submitting a proposal the proposer represents that neither it nor any of its officers, directors, shareholders, members or partners has been convicted or plead guilty or nolo contendere to any violation of the Sherman Anti-Trust Act, mail fraud, or other state, or federal criminal violation in connection with a contract let by the State of Tennessee or any other state or any political subdivision of the State of Tennessee.
- X. Conflict of Interest:** By submitting a proposal, proposer represents that no commissioner or officer of KUB or other persons whose duty is to vote for, let out, oversee, or in any manner supervise any work on any contract for KUB has a "direct interest" in the proposer or in the work which is subject to this proposal.
- Y. "Right to Know Law":** Manufacturers and Distributors that are regulated by and complying with the provisions of the OSHA hazard communication standard must provide KUB a material data safety sheet (MSDS) for any element, chemical, or

mixture that presents a physical hazard or a health hazard as defined by the OSHA standard or any hazardous substance. The data sheet must be provided to KUB at the time of delivery. Manufacturers and Distributors must insure that each container of hazardous chemical delivered to KUB be properly labeled, tagged, or marked in accordance with OSHA standards. Labels and other forms of warning for each incoming hazardous chemical will be inspected for compliance with the standard.

Z. Copyright, Trademark, Service Mark, or Patent Infringement:

a. Proposer shall, at its own expense, be entitled to and shall have the duty to defend any suit which may be brought against KUB to the extent that it is based on a claim that the products or services furnished infringe a copyright, trademark, service mark, or patent. Proposer shall further indemnify and hold harmless KUB against any award of damages and costs made against KUB by a final judgment or a court of last resort in any such suit.

b. If the products or services furnished under this proposal or contract are likely to, or do become, the subject of such a claim of infringement, then without diminishing Proposer's obligation to satisfy the final award, Proposer may at its option and expense:

i. Procure for KUB the right to continue using the product or service

ii. Replace or modify the alleged infringing products or services with other equally suitable products or services that are satisfactorily to KUB, so that they become non-infringing.

iii. Remove the products or discontinue the services and cancel any future charges pertaining thereto. Provided, however, that Proposer will not exercise options b.i., or b.ii. when they are impractical.

AA. Ownership of Intellectual Property: Any and all intellectual property, including but not limited to copyright, invention, trademark, trade name, service mark, and/or trade secrets created or conceived pursuant to or as a result of this contract and any related subcontract ("Intellectual Property"), shall be work made for hire and KUB shall be considered the creator of such Intellectual Property. KUB shall own the entire right, title and interest to the Intellectual Property throughout the world. Contractor shall notify KUB, within thirty (30) days, of the creation of any Intellectual Property by its or its subcontractor(s). Contractor, on behalf of itself and any subcontractor(s), agrees to execute any and all document(s) necessary to assure ownership of the Intellectual Property vests in KUB and shall take no affirmative actions that might have the effect of vesting all or part of the Intellectual Property in any entity other than KUB. The Intellectual Property shall not be disclosed by contractor or its subcontractor(s) to any entity not KUB without the express written authorization of KUB.

BB. Property of KUB: Any materials, including reports, computer programs, and other deliverables created under the Contract Documents are the sole property of KUB. The successful Proposer is not entitled to a patent or copyright on those materials and may not transfer the patent or copyright to anyone else. The Proposer shall not use or release these materials without the prior written consent of KUB.

CC. Force Majeure: No party shall have any liability to the other hereunder by reason of any delay or failure to perform any obligation or covenant if the delay or failure to perform is occasioned by *force majeure*, meaning any act of God, storm, fire,

- casualty, flood, earthquake, embargo, civil disturbance, acts of terrorism, governmental regulation, or causes similar nature beyond its control.
- DD. Possession of Weapons:** All Proposers vendors, suppliers, and service providers and their employees, agents, or subcontractors are prohibited from possessing any weapons on KUB property.
- EE. Search:** All persons, packages, and vehicles on KUB property are subject to being searched. Routine unannounced searches by KUB may be conducted. Refusal to submit to random searches will be grounds for removal from KUB property and prohibited access in the future. All vehicles leaving the KUB facilities are subject to being searched.
- FF. Traffic:** Traffic regulations are to be observed at all times.

Attachment A “Exceptions to Terms and Conditions”

The Proposer hereby declares that the following list states any and all variations from and exception to the requirements of the Terms and Conditions and that, otherwise, it is the intent of the Proposer that the materials and services work be performed in strict accordance with the Contract Documents. The Proposer acknowledges that the listing of any exception, which is unacceptable to KUB, will have the effect of voiding the proposal.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

The Proposer hereby accepts the Terms and Conditions described herein except for the list of exceptions described immediately above.

Date:

Signed:

Title:

Attachment B**“Reference List”**

List references that most closely reflect similar scope within the past five (5) years. Complete a separate Reference Listing for each Reference.

Name of Company, Utility, City, etc

Address:

Contact Name: _____ Title: _____

Phone: _____ Email Address: _____

Service Dates: _____

Name of Company, Utility, City, etc

Address:

Contact Name: _____ Title: _____

Phone: _____ Email Address: _____

Service Dates: _____

Attachment C “Contact Information”

Company Name: _____

Company Address: _____

Contact Name(s): _____

Title: _____

Phone: _____ Fax: _____ Cell: _____

Email: _____

Contact Name(s): _____

Title: _____

Phone: _____ Fax: _____ Cell: _____

Email: _____

Contact Name(s): _____

Title: _____

Phone: _____ Fax: _____ Cell: _____

Email: _____

Contact Name(s): _____

Title: _____

Phone: _____ Fax: _____ Cell: _____

Email: _____