Section 4.9: Required Forms

PWC22-23-063

ORACLE FUSION CLOUD SYSTEM INTEGRATOR SERVICES

Date of Issue: July 7, 2023

Date of Opening: August 16, 2023

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4   RFP FORMS

4.1   Service Provider Background Form

Service provider name:	
Relationship with software provider:	

Does the service provider's bid include any third-party vendors?	Yes ☐	No ☐

1.	What are the key differentiators of the service provider and its proposed services?
2.	What strategic alliance has the service provider made to further strengthen services?
3.	How will the service provider guarantee the services provided?
4.	What are the service provider's near-term and long-term goals, and the strategies to reach these goals?
5.	What is the service provider's niche in the marketplace and the service provider's preferred customer size?
6.	Please describe the service provider's commitment to providing services for the public sector marketplace.

7.	How many current system implementations does the service provider have *in-process*?	
		Current in-process Implementations
Utilities		
Other public sector		
Other non-public sector		
Overall:		

8.	Where is the Vendor's closest support facility/sales office to Fayetteville, NC?
9.	Where is the service provider's headquarters?
10.	Please disclose any outstanding litigation against your company within the last 5 years.

11.	Please list the service provider's sales in the previous three years:	
Year	Sales	
2022		
2021		
2020		

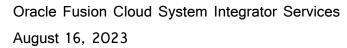| 12.	Describe the service provider's experience with migrating from Oracle EBS (v12.1.3) to Oracle Fusion Cloud.

4.2   Project Management Approach Form

13.	How does the service provider plan to manage the material that is produced during the project through potential solutions such as a collaboration environment?
14.	Provide specific information on project close-out activities to transition day-to-day system operations to PWC.
15.	What percentage of the Project Manager's time will be devoted to the implementation? Explain the service provider's project management approach.

4.3   Report Development Form

16.	What is the service provider's familiarity with report creation and custom reports in the Oracle Fusion Cloud?
17.	What reports are available out of the box? Provide a list here and samples at the end of this section.
18.	Describe the service provider's process for determining the scope of reports that will have to be developed (custom), the process for testing, and the amount of time dedicated to custom report development in the proposal.

4.4   Training Form

19.	What is the service provider's recommended approach to training (End-user, train the trainer, hybrid approach), for PWC, and why?
20.	What types of training documentation will be developed by the service provider? Where will the training/functional/technical documentation be stored and accessed? When will final documentation be provided to PWC?
21.	Describe the opportunities for ongoing training.

4.5   Staffing Plan Form

22.	Describe the activities that will occur on-site vs. off-site during the implementation. Describe how you will handle the requirements to process/maintain PSI data only on-site at PWC.		
23.	Use the table provided below to identify the number of PWC business staff expected to be committed to the project implementation. Initial identification of project roles has been provided but should be supplemented or revised by the service provider based on their experience in implementing their product in similar environments.		
	Project Role	**Project Responsibilities**	**FTE**
23a.	Executive Sponsor(s)		☐
23b.	Project Manager		☐
23c.	Project Administrator		☐

23d.	Functional Process Owners			☐
23e.	Functional Process Team Participants (per member involvement)			☐
23f.	Training Coordinator Team Lead			☐
23g.	Change Management Team Lead			☐
23h.	Communications Team Lead			☐
23i.	Other Roles			☐
24.	Use the table below to identify the number of technical resources expected to be committed to the project implementation. Initial identification of project roles has been provided but should be supplemented or revised by the service provider based on their experience in implementing their product in similar environments.			

	Project Role	# of FTEs	Skill Set Required	Training Required?	Training Provided?
24a.	Help Desk				
24b.	Trainer				
24c.	DBA				
24d.	Report Developer				
24e.	Application Support				

24f.	System Administrator				
24g.	Security Administrator				
24h.	QA				
24i.	OIC Developer				
24j.	Other Roles				

4.6   Ongoing Support Services Form

	Support and Maintenance	
	Support and Maintenance	
25.	Describe post implementation support provided for any business functions implemented.	
26.	Does the service provider provide support for the first annual or biennial close process? Describe. Does the service provider provide support for W2, 1099 that are annual requirements in January or audit requirements in August that are outside the first annual or biennial close process?	
27.	Provide the following regarding the number of business staff PWC should expect to be committed to providing on-going application support: • Role • Responsibility • Estimated time commitment in terms of FTE time	

Role	Responsibility	Estimated commitment in FTE

28.	For ongoing IT staff resources, please provide the following information:

- Type of positions required (e.g., help desk, trainer, DBA, report developer, application support, system administrator, security administration, etc.)

- Number of FTEs within each position

- Skill sets required for each position

- Training required and whether the service provider provides this training

Position	# FTE	Skill Sets Required	Training Required	Vendor Training

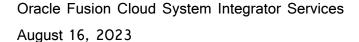|				
29.	Describe the transition process from the service provider to Oracle, internal staff and/or managed service provider.			

4.7   Client Reference Form

Service provider name:	
Customer name:	
Customer contact:	
Customer phone number:	( )
Customer E-mail address	
System which Solution Replaced	

Describe Nature of Project and Services Provided to This Client:

Configuration of Solution Implemented (Hardware, Software):

4.8 Pricing Forms

Please complete the pricing forms that have been provided in the associated Microsoft Excel pricing spreadsheet. It is the responsibility of the service provider to ensure the accuracy of the pricing provided as part of your response. Any errors in providing an accurate price response due to inaccuracies in the provided templates are the sole responsibility of the responding service provider. If there is not enough space to describe the pricing on these forms, please attach a separate pricing page and provide the pricing information in the same type of format so that it is easy to understand. PWC requests a firm, fixed price for each of the components described below that are included on the attached Microsoft Excel pricing spreadsheet as separate tabs:

- ☐ Vendor Checklist (including Travel & Lodging Costs and Discount)

- ☐ Proposal Summary (no direct input required)

- ☐ Implementation Services

- ☐ Training Services

- ☐ Data Conversion Services

- ☐ Interfaces

- ☐ Modifications

- ☐ Other Implementation Services

- ☐ Optional

- ☐ Staffing by Activity