

# REQUEST FOR PROPOSAL

## PROFESSIONAL SERVICES AUTOMATION SOLUTION

Submittal Date: April 22, 2016 @ 11:00 AM (PST)

Issued by:

Southern California Coastal Water Research Project  
3535 Harbor Blvd., Suite 110  
Costa Mesa, CA 92626

## **Request for Proposal (RFP) Professional Services Automation Solution**

### **1.0 INTRODUCTION**

The Southern California Coastal Water Research Project (SCCWRP) is soliciting proposals from firms interested in providing software, consulting and technical support services to deliver a cost-effective, integrated, cloud-based professional services automation (PSA) solution.

### **2.0 BACKGROUND**

SCCWRP is a leading U.S. environmental research institute that works to enhance the scientific foundation for management of Southern California's ocean and coastal watersheds. Since its founding as a public agency in 1969, SCCWRP has been a champion of sound interdisciplinary approaches to solving complex challenges in water management. To learn more about SCCWRP, visit [www.sccwrp.org](http://www.sccwrp.org).

SCCWRP is a project-based professional services organization. As an intergovernmental public agency, SCCWRP is funded by government contracts and bills on a time and material basis. SCCWRP currently uses Sage 50 and Excel for accounting, project costing, resource management and contract reporting. SCCWRP also uses Office365 and maintains several specialized scientific software applications managed on Microsoft Windows servers and Microsoft SQL databases. Here are some additional facts about the agency:

- Annual revenue of \$10 million
- One location with 45 full-time professionals and 25 part-timers
- Manages approximately 100 ongoing scientific projects at any given time, each one lasting 1-5 years and ranging from \$50,000 to \$3 million each
- Project contracts and grants are federal and state funded
- Issues 200 invoices and 2,000 accounts payable checks annually
- No fixed assets or inventory modules required

SCCWRP intends to replace its legacy accounting software with an integrated, cloud-based, managed-services PSA solution that will cost-effectively automate its business processes and enhance management reporting. In addition to the cost of the software, SCCWRP anticipates vendor services will be required to implement the solution and train SCCWRP staff in the use of the software and the development of workflows. SCCWRP anticipates awarding a single contract to the selected vendor. The period of performance of the contract is one (1) year, with an option to extend for four (4) additional one-year terms to provide related services as required.

### **2.0 RFP GUIDELINES**

All bidders should inform SCCWRP via email ([bryann@sccwrp.org](mailto:bryann@sccwrp.org)) by April 11, 2016 of their intention to submit a bid. The notification is not mandatory, but is necessary to receive future updates to this bid notification. SCCWRP will not conduct a pre-proposal conference for this RFP. Proposers who have questions about this RFP should email their questions to [bryann@sccwrp.org](mailto:bryann@sccwrp.org) by April 11, 2016. SCCWRP's response to the written questions will be sent to the bidders by email and posted on the SCCWRP website ([www.sccwrp.org](http://www.sccwrp.org)).

In the event it becomes necessary to modify or cancel this RFP or to provide additional information, an amendment will be issued to all respondents of this RFP. This solicitation for proposals shall not be construed as obligating SCCWRP to award a contract. All costs incurred

in the preparation of a proposal and participation in this RFP and negotiation process shall be borne by the proposing firms.

### **3.0 PROPOSAL SUBMISSION**

Proposals for this RFP must be submitted by hardcopy no later than 11:00 am (PST) on April 22, 2016. Proposals received after the stipulated date and time will not be considered.

Please submit four (4) hard copies of the bidder's proposal in a sealed envelope marked "Professional Services Automation Solution" and addressed to:

Bryan Nece, Administrative Officer  
Southern California Coastal Water Research Project  
3535 Harbor Blvd., Suite 110  
Costa Mesa, CA 92626

### **4.0 SCOPE OF SERVICES**

Through this RFP, SCCWRP aims to select a cloud-based PSA solution. This solution is expected to consist of software and vendor services to implement the selected software, train staff in its use and, as required, provide services to assist with the use of the software for a period of up to five years. The solution may include, but is not limited to:

- Client software and licenses
- Software support and maintenance
- Software implementation services
- Workflow, document handling and related software configuration services
- System administration and project team training

Services will be provided at SCCWRP's direction and discretion, and may be provided in collaboration with SCCWRP IT staff. Services may be provided onsite or remotely, at SCCWRP's discretion. Services work with a defined scope will be performed on a task-order basis, with task orders issued for services as needed. Task orders must be signed by both parties to be binding. Task orders shall include a detailed description of the work to be performed, a list of deliverables to be provided to SCCWRP, assumptions by each party and a detailed cost proposal for the work to be performed.

### **5.0 USER GROUPS**

SCCWRP anticipates the size of its user groups to be as follows:

- Accounting/system administrators (5)
- Project managers (10)
  - Project dashboards, CRM, workflow approvals
- Full-time workflow users (30)
  - Timesheets, PO origination and T&E reimbursement
- Part-time workflow users (25)
  - Timesheets

## **6.0 BUSINESS REQUIREMENTS**

SCCWRP desires to implement an integrated solution to meet its strategic objectives. The primary focus will be on user functionality. Key features should include:

- Accounting and invoicing
- Financial reporting
- Project accounting and management
- Contract and subcontract management
- Time and expense management
- Payroll
- Customer relationship management
- Resource management
- Automation of workflows
- Document management
- Real-time user dashboards
- Mobile access

## **7.0 EVALUATION CRITERIA (100 PTS)**

- Software Solution (20 PTS)
- Work Approach (30 PTS)
- Qualifications and Experience (30 PTS)
- Total Cost of Ownership (20 PTS)

FINAL EVALUATION PHASE (optional)

- Interviews

Interviews and software demonstrations may be conducted with the top-ranked proposers.

## **8.0 RFP ELEMENTS AND INSTRUCTIONS**

You are requested to provide thorough but concise responses. SCCWRP's evaluation procedure places a higher premium on thoroughness of presentation and information rather than on quantity of material included. The consultant's proposal shall contain the following sections:

- Section 1 – Executive Summary
- Section 2 – Software Solution
- Section 3 – Work Approach
- Section 4 – Qualifications and Experience
- Section 5 – Cost Information
- Appendix A – Cost Information
- Appendix B – Customer List

### **Section 1 – Executive Summary**

This section shall describe the overall scope of the proposal and the consultant's thought leadership within the industry. This section also should indicate any additional solutions offered by the consultant that complement the proposed offering.

## **Section 2 – Software Solution**

This section should comprehensively describe the consultant's software solution and how it meets SCCWRP's requirements. If the consultant's software does not meet a requirement, the consultant should propose an enhancement or third-party software solution. At a minimum, this section should contain:

- A narrative description of how the software will address each key business requirement (Section 6 of this document)
- High-level flow charts or systems diagrams that relate to the proposed solution, or any other graphic or exhibit that will help explain the proposed solution
- A description of the system configuration, modules and technical architecture
- A description of how the managed services will ensure stability and continuity of operations
- A description of the typical maintenance that needs to be performed on each of the product(s), and a strategy for system upgrades
- A description of future system enhancements and timetables
- A description of the training curriculum, including duration and description of courses/modules

## **Section 3 – Work Approach**

This section should describe the consultant's considerations for performance of the project and implementation methodology. A summary of innovative solutions and suggestions for enhancing the scope of services should be included. At a minimum, this section should contain:

- A definition of the assumptions made regarding how the consultant will accomplish the scope of services, as well as the factors the consultant believes are risks to the successful completion of the project and proposed mitigation strategies
- A description of appropriate solutions the consultant plans to use to reduce the expense of licensing fees
- A plan that outlines a communications and coordination strategy between the consultant's team and SCCWRP
- A description of the consultant's experience providing technical support services and of the organizational support structures and processes the consultant has previously established

## **Section 4 – Qualifications and Experience**

The purpose of this section is to provide SCCWRP with information on the consultant's background, experience, and financial stability. Reference checks will be performed to assess the consultant's overall performance and success of similar work. The consultant should provide the following information:

- A company profile that contains a brief company history, business focus and background of the principals
  - Total company revenue, number of employees and current install base
- List of project members with biographies
- List of independent contractors planned for this project
  - List of the implementation projects that the consultant has successfully completed using the same software proposed for the SCCWRP deployment
  - List of the certifications that each consultant who would work on this project holds
  - List of any industry and manufacturer designations or awards

- List of any industry thought leadership presentations or articles
- List of intellectual property developed in house or being sold as third-party

### **Section 5 – Cost Information**

SCCWRP has set a budget of \$75,000 for the consultant's services for the first year, which excludes software licensing fees.

This section should present detailed information on the costs for the software and services proposed. It should include a copy of the software vendor's quote for one and three years, a budget for implementation services by task which specifies the labor category, and hours and hourly rate of each member of the proposed team. All rates quoted shall be fully burdened and valid throughout the initial contract period unless otherwise amended and agreed to by both parties in writing. Finally, this section should specify all additional expenses that are, or may be, billable to SCCWRP.

### **Appendix A – Cost Information**

This section should include cost information in the specific format outlined in Appendix A.

### **Appendix B – Customer List**

This section should consist of a complete list of customers with contact information to serve as references. SCCWRP will coordinate any such calls in advance with the consultant.

## **9.0 AWARD PROCESS**

A SCCWRP evaluation team will review each proposal. SCCWRP will request clarifications and additional information as needed. After the evaluation team individually scores each proposal, the scores will be tallied and the firms will be ranked based on the scores. A selection may be made based on the proposals and initial evaluation criteria alone. Alternatively, the evaluation team may create a short list of the top-ranked firms and invite the short-listed firms for interviews and/or reference checks. Final selection will be based on interviews and/or reference checks. SCCWRP intends to select the consultant who represents the best value to SCCWRP and to begin the negotiation and award process based on the evaluated scores. If SCCWRP and the selected firm are unable to reach a mutual agreement, SCCWRP will terminate negotiations and move to the next highest-ranked firm and proceed with negotiations.

**APPENDIX A  
COST INFORMATION**

1) All software licensing fees:

Provide actual software vendor's detailed quote for 12 and 36 months.

2) Consultant's initial implementation fee:

Provide in the following matrix format all personnel hours by task with hourly rates and direct costs. Please add tasks and personnel classifications as needed.

		Principal	Manager	Consultant	Developer	Total	Labor	Direct	Total
Tasks	Descrip	\$000	\$000	\$000	\$000	Hours	Costs	Costs	Amount
1.0		(Hours)	(Hours)	(Hours)	(Hours)				
2.0									
3.0									
4.0									
5.0									
6.0									
Total Hours									
Total Costs									

3) Consultant's fees for support and maintenance for second year:

		Principal	Manager	Consultant	Developer	Total	Labor	Direct	Total
Tasks	Descrip	\$000	\$000	\$000	\$000	Hours	Costs	Costs	Amount
1.0		(Hours)	(Hours)	(Hours)	(Hours)				
2.0									
3.0									
4.0									
5.0									
6.0									
Total Hours									
Total Costs									

4) List any other fees or expenses.