

Project Management Office (PMO)

Request for Proposal (RFP)

PeopleSoft Application Hosting, Maintenance and Development Support

TO: Offerors
FROM: Institute of International Education, Inc. (IIE)
SUBJECT: PeopleSoft Application Hosting, Maintenance and Development Support

DUE DATES:

Issue of RFP:	11/3/2023
Notification of Intent and Signing of NDA:	11/17/2023
Submission of Questions:	12/1/2023 11:59 PM EST
Publishing of Answers:	12/15/2023
Submission of Initial Proposals:	1/5/2024 11:59 PM EST
Preliminary Review of Offers:	2/2/2024
Offeror Demonstrations:	2/12/2024 - 2/15/2024
Submission of Best and Final Offers:	2/16/2024 11:59 PM EST
Final Decision on Selected Offer:	3/1/2024
Anticipated Transition:	3/2/2024 - 6/30/2024
Anticipated Managed Services Go-Live:	7/1/2024





IIE invites qualified organizations (“Offerors”) to submit a best-value proposal for the services described in the Request for Proposal (RFP) enclosed below.

The purpose of this RFP is to select a Partner to provide PeopleSoft (PS) Managed Services for Hosting, Maintenance and Development Support of IIE’s Enterprise Resource Planning (ERP) application.

IIE intends to issue a contract to suitable a Offeror who demonstrate that they have the capacity to deliver quality technical assistance and are the most responsive to the requirements of the RFP.

The remainder of this RFP provides additional information that will allow Offerors to understand the scope of the effort and develop a proposal in the format desired by IIE.

Offerors are encouraged to read this RFP in its entirety (including any and all attachments), paying specific attention to the instructions and requirements included herein. Issuance of this RFP does not constitute an award commitment on the part of the IIE. IIE reserves the right to reject any offer received in response to this request. IIE shall not be liable for any costs incurred by Offerors in the preparation and submission of their proposals.

The agreement resulting from this RFP will be provided to the most responsive Offeror whose Offer will be the most advantageous to IIE in terms of cost, functionality, other factors – as further specified in this RFP.

The information presented in this RFP is furnished solely for the purpose of assisting Offerors in making their own evaluation of the Scope of Work and does not purport to be all-inclusive or to contain all the information Offerors may require. This RFP is not an offer by IIE to contract, but rather an attempt to establish a common framework for IIE to evaluate potential suppliers. Each Offeror should conduct their own investigations, projections and conclusions to independently verify the information contained in this RFP and to obtain any additional information needed, prior to submitting a proposal.

All questions, comments, requests for clarifications must be sent in writing to the **RFP Contact:**

Daniela Gheorghiu-Zmeu – Director of PMO
dgheorghiu-zmeu@iie.org

All questions must be submitted no later than the date and time indicated above. Questions will not be entertained if received after the due date or by any means other than the e-mail address specified above.

Answers to all questions received by the due date will be made publicly available by the corresponding due date set above. As such, there should be no expectation of IIE confidential/proprietary/insider information provided in the answers. No answers will be provided via texting, phone call or in-person conversation. Offerors are strongly discouraged to seek information via any other channels/means other than the RFP specifications and the formal Q&A (Questions & Answers); such attempts may result in disqualifying decisions.



All proposals must be received complete/in-full – including any relevant supporting attachments or additional documentation –by the corresponding due date and time set above. No proposals will be considered if received after the due date or by any means other than the e-mail address specified.

All proposals received by the due date will be evaluated as described in the RFP. This will result in the short-listing of three top proposals. The top-three Offerors will be invited to present a demonstration to IIE stakeholders, showcasing their services and capabilities. All demonstrations will be scheduled and delivered by the set due date.

Following the demonstrations and submission of the Best and Final Offers (BFOs), IIE will make the final proposal selection decision and notify the winning Offeror.

If substantive questions are received which affect the response to the solicitation or if changes are made to the closing date and time, as well as other aspects of the RFP, this solicitation will be amended.

All materials related to this solicitation – e.g. RFP content (this document), any amendments to it, additional attachments (if applicable), Q&A – will be posted on the IIE's procurement opportunities website: <https://www.iie.org/Work-With-Us/Subawards-Procurements>. Offerors are encouraged to check this website periodically.

IIE encourages all Offerors to indicate their interest to participate in this RFP by sending a brief Notification of Intent (NOI) e-mail to the address mentioned above. This will trigger the process to ensure a mutual Non-Disclosure Agreement (NDA) is on file, meant to speed up the RFP process. Nevertheless, IIE will accept questions and proposals submitted even in the absence of NOI and/or NDA and will sign an NDA at that moment.

Thank you for your interest – we're looking forward to your participation.

Sincerely,

Peter Young
SVP, Chief Technology Officer
Institute of International Education



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RFP: PeopleSoft Application Hosting, Maintenance and Development Support

1. Introduction

1.1 IIE Background

The Institute of International Education (“IIE” or the “Institute”) is a New York not-for-profit corporation that is among the world’s largest and most experienced international education and training organizations. Founded in 1919, IIE promotes educational exchange around the world, through a wealth of programs and services including Fellowship and Scholarship Management, Higher Education Institutional Development, Emergency Student and Scholar Assistance, Leadership Development.

For more than 100 years, IIE has promoted educational exchange around the world. The Institute currently implements more than 200 programs benefiting 40,000 participants from 183 countries. Foremost among these programs is the world-renowned Fulbright Program, which IIE has had the honor to administer on behalf of the U.S. Department of State since the program’s inception in 1946. In addition to the U.S. Department of State, program sponsors include: the U.S. Agency for International Development (USAID); major philanthropic foundations; private and public corporations; foreign governments; individuals.

With IIE’s global headquarters in New York City, IIE has offices around the world, including offices in the United States (Washington DC, Chicago, Houston, San Francisco) and staff in other countries (China, Egypt, Ethiopia, Hungary, India, Indonesia, Mexico, Russia, Thailand, Ukraine etc.).

1.2 Purpose & Objectives of the RFP

The purpose of this RFP is to identify a qualified organization to be awarded a Managed Services contract that encompasses all the needs/requirements documented below.

The Master Contractor must be able to provide all the requested services:

- Provisioning of IIE-owned environments for PeopleSoft Finance & HR (using industry-leading cloud platforms e.g.: Oracle Cloud Infrastructure (OCI), Microsoft Azure Cloud, Amazon Web Services (AWS));
- Maintenance of IIE-owned PeopleSoft environments;
- Support of IIE-owned PeopleSoft environments.

✍ IIE-owned means that IIE holds all licenses, subscriptions and account access credentials to cloud PeopleSoft environments.

2. Statement of Work (SOW) Requirements

2.1 Background

IIE uses Oracle PeopleSoft Financial Supply Chain Management (FSCM) and Human Capital Management (HCM) products to maintain its Financial and Human Resources functions, used by IIE users located in North America and at its International Office locations. PeopleSoft FSCM and HCM Production environments are used to enable IIE users to conduct critical business transactions. Non-Production environments are used for development, support and troubleshooting.

The current infrastructure includes access to and from external sources, for data exchange between systems in real time and in batch mode.

Managed Services renewal is necessary because of current contract expiration.

2.2 Purpose and Objectives

The Oracle PeopleSoft FSCM and HCM products are currently hosted on an Oracle Cloud (OCI) environment by a third party Vendor, where IIE is a tenant.

IIE's purpose is to renew the current Managed Services engagement:

- IIE will lease the cloud platform tenancy in its own name;
- The selected Vendor will support the PeopleSoft infrastructure and provide Functional and Technical support as needed.

IIE's objectives are as follows:

- Own the lease of cloud platform tenancy;
- Ensure high quality of maintenance & support for the PeopleSoft infrastructure(s):
 - ▶ Reliable, scalable, flexible, available system;
 - ▶ Reduced operating and supporting costs for all updates, patches, fixes;
 - ▶ Development staff and skills to code routine changes and minor enhancements to all PeopleSoft applications.

2.3 Scope of Work

The scope of the **Transition Project** phase encompasses:

- Moving the existing Oracle Cloud PeopleSoft applications tenancy (Production and Non-Production) to IIE's own cloud tenancy;
- Transitioning Managed Services operations from the current Provider to the selected future Provider.

✍ The Transition Project phase is expected to be completed by Jul 1st 2024 – which is the milestone for Go-Live with the new Managed Services contract/provider (as applicable).

The scope of the **Managed Services Operations** phase encompasses:

- Provisioning of Managed Services by the selected future Provider.

✍ The Managed Services operational support is expected to be provided for the following initial 3 years, followed by annual extensions. No annual automatic renewal will be applicable.

2.4 Deliverables & Services

IIE uses PeopleSoft applications (HCM & FSCM) to manage its workforce and financial transactions, which are critical to business operations.

Most key processes – e.g. HR Operations, Employee Benefits, Payroll, General Ledger, Grants and Contracts, Purchasing, Accounts Payable, Cash Management – must have 24x7 uptime and reliability.

It is critical to host and support the systems to be highly reliable, scalable, flexible, robust, up-to-date with all Regulatory, Security and environment/application patches, fixes and updates.

The RFP solicits information on both the project phase (transition from current to selected future Provider) and the operational phase (provision of Managed Services by selected Provider).

Project Deliverables & Operations Support Services required are listed below.

2.4.1 Environment & Operations Transition

- Handover environment/admin/ops keys from existing Oracle Cloud Infrastructure (OCI) hosting site to new cloud environment for IIE PeopleSoft Applications – HCM and FSCM:
 - ▶ Cloud licenses;
 - ▶ PeopleSoft licenses;
 - ▶ Subscriptions;
 - ▶ Administration;
 - ▶ Documentation;
 - ▶ Knowledge transfer.

2.4.2 Hosting and Maintenance Support

- Host all PeopleSoft Instances: DEV, Remediation, QA, PRD, DEMO, PUM (and any other additional instances needed in the future);
- Provide a scalable environment to handle expected growth;
- Provide 24x7 global technical support to cover all regions where IIE operates;
- Provide reliable Service with well-defined SLAs and escalation procedures;
- Provide a disaster recovery plan to restore operations;
- Provide timely regulatory and legal patches, updates and fixes to Network, Operating systems, Database;

- Provide application servers, web servers and applications accommodating IIE’s business schedule;
- Support a hosted environment that addresses necessary patch management to maintain a secure and reliable environment;
- Provide predictable maintenance downtimes acceptable to IIE’s calendar;
- Provide regular People Tools upgrades (as appropriate/needed);
- Provide PUM upgrades; work with HCM and FSCM teams to identify all enhancements and fixes for implementation and develop project plans to deploy (current upgrade schedule is annual);
- Scale all PS infrastructure as needed to meet continued growth;
- Operate in a highly available and secure data center;
- Comply with our 3rd party audit firm in providing SSAE-16 and SOC reports when necessary;
- Prevent, detect and respond to intrusions and provide outlines of all protocols in place;
- Ensure all integrations between PeopleSoft environments and IIE’s 3rd party applications – e.g. HCM-to-FSCM, CRM-to-FSCM, D365-to-FSCM and others, as listed in the table of interfaces (see [Appendix A. Current Infrastructure & Configuration](#));
- Ensure the integration between PeopleSoft and IIE Active Directory server (or IIE approved single sign on platform);
- Perform Database backups and refreshes when necessary;
- Ensure connectivity to RDP/VPN, File Server, FTP and print servers;
- Install PGP/SSH Keys when and where necessary, for encryption of our data transmission.

For more details, see [Appendix A. Current Infrastructure & Configuration](#).

2.4.3 Application Management & Development Services

- Provide application support to all IIE PeopleSoft Applications – HCM and FSCM;
- Provide support and management of all required server and database licenses and certificates of IIE-owned environments;
- Adhere to defined SLAs on all support ticket requests;
- Design, develop, test, migrate, deploy production support fixes;
- Provide maintenance and administrative support;
- Support all Break-Fix issues, including:
 - ▶ Data anomalies;
 - ▶ Complex issues;

- ▶ System & Interface enhancement;
 - ▶ Application troubleshooting;
 - ▶ Performance tuning;
 - ▶ Workflow disruptions;
 - ▶ Process failures;
 - ▶ Integrations issues with in the PS applications or 3rd party providers (banking, insurance providers, CRM, D365, Vendor Portal, FTP and Others);
- Adhere to IIE SDLC procedures and Policies;
 - Provide regular statistics and support ticket analysis to IIE management;
 - Support all Third Party tools that work with PeopleSoft applications, e.g. SQR, nVision, Crystal, XML Publisher and Unix scripts as necessary;
 - Support all integration/interface touchpoints with PeopleSoft and other IIE inhouse or other external systems, as necessary;
 - Accommodate minor enhancement requests, which may include working with IIE functional and technical stakeholders;
 - Prepare technical design, migration, related support documentation;
 - Build and share PS support ticket Knowledge Base;
 - Support portal and security access requests;
 - Integrate with IIE's incident management system (currently ServicePro, ServiceNow within a year) to track support tickets;
 - Provide onsite PS Finance Lead consulting resource and fractional/remote FTE for HR lead to assist IIE (specify details about development resources - onshore, offshore etc.);
 - Update and maintain a Production Run Book and/or other technical documentations on an on-going basis.

2.5 Phases, Activities and Tasks

As mentioned above, the RFP encompasses two phases:

- ▶ **Transition Project:** transition/handover from current managed services provider to RFP-selected managed services provider, including environment & access handover to/sharing with IIE;
- ▶ **Managed Services Operations:** provision of managed services by RFP-selected managed services provider.

IIE has no mandatory requirements regarding the activities and tasks pertaining to the phases above.

2.6 Delivery Locations

Application Hosting is expected to be provided in an industry-leading cloud environment, which will be accessed and owned by IIE using remote desktops/virtual machines.

IIE does not require any onsite presence for delivery of services.

3. General RFP Terms and Conditions

- This RFP is issued as a public notice to ensure that all interested, qualified and eligible organizations legally registered for business in the United States have a fair opportunity to submit proposals. Qualified international firms should have local and/or international experts available to provide these services.
- Proposals shall be written in English. IIE shall not be responsible for reimbursing any costs related to proposal elaboration and submission.
- IIE intends to award contracts for the entire scope of work as follows:
 - A Firm Fixed Price (FFP) Statement of Work (SOW) will cover the **Transition Project**, comprising of **Discovery** and **Planning & Execution** stages.
 - The **Discovery** stage will refer to typical deliverables pertaining to vendor's discovery. The purpose of the Discovery stage is to enable the winning Vendor to gain all the necessary information for Planning & Execution.
IIE is looking for the following objectives/deliverables for the Discovery stage:
 - ▶ Cloud Architecture;
 - ▶ Cloud Tenancy Ownership;
 - ▶ Infrastructure Build Plan;
 - ▶ Knowledge Transfer (KT) Plan;
 - ▶ Technical Build Requirements;
 - ▶ Infrastructure Test Plan;
 - ▶ Other deliverables proposed by the Offeror.
 - Based on the results and decisions of the Discovery stage, the **Planning & Execution** stage will make reference to typical deliverables pertaining to vendor's project planning and execution, including details such as: scope, deliverables, requirements/product backlog, schedule/release train, cost & billing schedule, staffing etc.
IIE is looking for the following objectives/deliverables for the Planning & Execution stages:
 - ▶ Infrastructure Build;
 - ▶ Production & Non-Production Build Schedule;
 - ▶ Infrastructure Testing;
 - ▶ Documentation (Environment Run Book);
 - ▶ Billing Schedule;
 - ▶ Staffing Details;

- ▶ Operational Plan.
- Following the completion of the Cloud Architecture, IIE intends to work directly with the Cloud vendor on the Cloud Tenancy.
- Following the completion of the Transition Project, a **Firm Fixed Price (FFP) Statement of Work (SOW) / Service Level Agreement (SLA)** will be signed for Managed Services operations.
- IIE reserves the right to:
 - ▶ Reject any or all offers, modify this RFP, or terminate this RFP and reissue a new RFP to whomever IIE deems appropriate, without obligation or liability to any potential Offeror or other party;
 - ▶ Accept other than the lowest price offered;
 - ▶ Award a contract on the basis of initial offers received, without discussions or requests for best and final offers;
 - ▶ Award only part of the activities in this solicitation, or award more than one contract, or award no contract based upon the issuing of this RFP;
 - ▶ Terminate the transition project at any stage and not proceed to signing a Managed Services operations SOW/SLA, for any reason, without obligation or liability to any party.
- Nothing in this RFP is, or should be, relied on by Offeror, as a promise or representation by IIE. IIE does not make any representation or warranty as to the completeness of this RFP or have any liability for any representations (express or implied) contained in, or omissions from, this RFP.
- This RFP and any replies to any written notifications are transmitted to the Offeror solely for the purposes of the Offeror preparing and submitting a Proposal. Each Offeror shall keep the RFP and its contents confidential and shall return the RFP (without keeping copies) to IIE, if the Offeror elects not to submit a proposal, or upon being requested to do so by IIE.
- Any information or materials submitted in response to this RFP and/or as a proposal (whether successful or unsuccessful) shall become the property of IIE and will not be returned.
- In submitting a proposal, Offerors must agree that their offer shall remain firm for a period of no less than 120 days from the RFP closing date.
- Offerors must provide full, truthful, accurate and complete information, as requested. Failure to follow the specifications and requirements provided in this RFP may result in disqualification.
- Offerors must provide disclosure of potential conflicts of interest: any past, present or future relationships with any party associated with the issuance, review or management of this solicitation and anticipated award, in or outside of the country of performance.



Failure to provide full and open disclosure may result in IIE having to reevaluate selection of a potential vendor.

- Any proposal received in response to this solicitation will be reviewed strictly as submitted and in accordance with the Evaluation Criteria documented in a further section.
- Offerors may withdraw proposals by written notice via email sent to the RFP contact provided and received at any time before award.
- The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions, found at: <https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services>.
The terms and conditions may be changed, added to, deleted or modified by IIE, prior to awarding the agreement. Other terms and conditions may be negotiated between IIE and the successful Offeror, at IIE's discretion.
- Payment terms for the award shall be approximately net thirty (30) days after satisfactory completion of each deliverable or milestone agreed upon and established in the resulting agreement.
Payment shall be made by the Institute of International Education ("IIE") via check or electronic funds transfer/bank wire.
The final payment terms in the contract will have full control, not this RFP.
No advance payments will be provided.
- Selection(s) may be renewed annually, at IIE's sole discretion, for up to five years before re-competition.
IIE reserves the right to exercise any one of the following options:
 - ▶ Accept the updated proposal, if changes are reasonable and within the scope of the original selection;
 - ▶ Negotiate any updates/changes;
 - ▶ Decide not to renew.
- Offerors are informed that IIE complies with U.S. Sanctions and Embargo Laws and Regulations, including **Executive Order 13224 on Terrorist Financing**, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any person or entity that participates in this bidding process, either as a prime or sub to the prime, must certify as part of the bid that he or it is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. IIE shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.
Firms or individuals that have an active exclusion on the System for Award Management (www.sam.gov) shall not be eligible for financing and shall not be used to provide any commodities or services contemplated by this RFP.
- Offerors are informed that IIE observes the prohibition on certain telecommunications and video surveillance services or equipment: covered equipment and services must not be part

of your offer to IIE – or otherwise your Offer will be rejected.

IIE cannot enter into a contract to procure or obtain equipment, services, or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

As described in **Public Law 115-232, section 889**, covered telecommunications equipment includes telecommunications equipment produced by **Huawei Technologies Company** or **ZTE Corporation** (or any subsidiary or affiliate of such entities).

4. RFP Participation Instructions

4.1 Notification of Intent (NOI)

- Offerors should send a simple “Notification of Intent” e-mail to the address specified above, to ensure a Non-Disclosure Agreement (NDA) is on file (or otherwise needs to be signed).

4.2 Submission of Questions

- Offerors must submit their questions no later than the date and time indicated above. Questions will not be entertained if received after the due date or by any means other than the e-mail address specified above.
- All questions should be submitted using the Q&A template posted together with the RFP on the IIE’s procurement opportunities website: <https://www.iie.org/Work-With-Us/Subawards-Procurements>.

Questions submitted in any format other than the template above may not be addressed/answered.

- Offerors should not submit questions that request confidential/proprietary information. Since the Q&A file will be posted publicly (and in total anonymity), such disclosure should not be expected.
- Reminder: please refrain from asking questions via any channels/means other than the formal RFP Q&A; such attempts may result in disqualifying decisions.

4.3 Overall Proposal

- Offerors are requested to submit proposals directly responsive to the terms, conditions and clauses of this RFP. Proposals are expected to be complete and comprehensive, per deliverables & services specified above and requirements detailed below.
- Offerors need to make sure they respond to each of the requested information item and their answers are direct responses to the information being sought. All requested forms, templates and tables referenced or inserted in this RFP must be completed. Besides those, IIE does not provide other RFP templates – Offerors are free to use their own. Failure to submit any specified required information will result in lower proposal scores.

- The overall proposal shall consist of two (2) physically separated parts: **Technical Proposal** and **Cost Proposal**.
- A copy of the Offeror's legal registration is requested along with the Technical Proposal.
- Offerors are invited to send any additional information or supplemental materials they see fit to aid IIE in properly evaluating their offerings.
- Offerors are encouraged to submit their best proposal(s) initially, as IIE intends to evaluate proposals and make an award decision without further discussions.
- The person signing the Offeror's proposal must have the proven authority to commit the Offeror to all the provisions of the Offeror's proposal.

4.4 Technical Proposal

The Technical Proposal shall be straightforward and concise, outlining how the Offeror intends to fulfill the technical requirements and complete the deliverables. No contractual price information is to be included in the Offeror's implementation work plan, so that it can be evaluated strictly on its technical merit.

As part of their Technical Proposal, Offerors are requested to submit the information and documentation listed below:

4.4.1 Letter of Transmittal

4.4.2 General Company Info

- Provide the following:
 - Legal name, registered address, "Remit to" mailing address if different from registered address;
 - Name and position title of authorized representative for this RFP, with phone number(s) and e-mail address;
 - General information about Offeror organization and the services offered, with website address.

4.4.3 Company Qualifications and Capabilities

- Briefly describe the company business and its experience in the field, illustrating overall services and capabilities to meet the terms of the RFP.
- Specify:
 - Number of years of overall company experience;
 - Number of years of company experience in the field relevant to IIE's RFP demand.
- In case of plans to outsource/subcontract the services or any part thereof: provide the same info as above about subcontractor(s).



4.4.4 Company Expertise and Experience in the RFP Field

- Briefly describe the company’s overall relevant experience and its track record of success directly in the engagement area.
- Document minimum **3 years** of experience / **3 engagements** relevant to this RFP, preferably within the most recent 3 years.

Provide contact info of references who can be reached for testimonials regarding these engagements (please make sure they can be reached and they accept to be contacted).

Note: Providing minimum **3 references** is mandatory. Failure to submit 3 verifiable references will result in lower proposal scores.

Note: You may provide more than 3 references, if highly relevant. IIE reserves the right to select which 3 references will be verified.

Use the table template below for each of the minimum 3 references requested – thus resulting into minimum 3 tables provided:

Ref. [# 1/2/3]	[Title of Engagement]
Client Organization:	
Scope of Engagement:	
Brief Description of Engagement:	
Relevance to This RFP:	
Period of Performance:	
Cost/Budget of Performance:	
Location of Delivery:	
Number of Offeror’s Resources Engaged:	
Roles of Offeror’s Resources Engaged:	
Reference’s Name, Job Title & Company:	



Ref. [# 1/2/3]	[Title of Engagement]
Reference's Email Address:	
Reference's Prone Number(s):	
Reference's Contact Verified & Acceptance Given (Yes/No):	

4.4.5 Outsourcing/Subcontracting Plans

- Detail plans to outsource/subcontract any part of the services/deliverables under the RFP.
- Provide the same info as above applicable to subcontractors.
- Provide Prime Contractor acknowledgement of full responsibility for own AND all subcontractor performance and compliance.

4.4.6 Transition Project Delivery Plan

- Detail the services/deliverables being offered and any information relevant to meeting the technical requirements stated.
- It is recommended to structure the transition project delivery plan following four major stages:
 - ▶ Discovery;
 - ▶ Planning;
 - ▶ Implementation;
 - ▶ Post-Implementation Hypercare/System Stabilization.
- Provide a Transition Project Delivery Plan that is deliverable-based and time-boxed to complete no later than July 1st 2024. The Delivery Plan should clearly specify:
 - ▶ Deliverable descriptions;
 - ▶ Delivery schedule, including activities/tasks, deliverable due dates & milestones;
 - ▶ Deliverable acceptance criteria (UAT).
- Generally, describe your Organization's methodology applicable to the processes below. Specifically, describe the methodology – and reasoning behind the methodology choice – to be applied on the Transition project, including:
 - ▶ Overall approach chosen (e.g. waterfall, agile, custom/proprietary) and project phases (if applicable);
 - ▶ Project Management plan/processes;
 - ▶ Project Risk Management plan/processes;

- ▶ Project Quality Assurance and Management (incl. V&V, Testing, UAT) plan/processes;
 - ▶ Project Change Control plan/processes;
 - ▶ Project Status Review plan/processes;
 - ▶ Project Reporting plan/processes.
- Include metrics whenever available/applicable.

4.4.7 Operation Managed Services Delivery Plan

- Provide your company's Service Level Agreement (SLA) as part of your proposal.

4.4.8 Staffing

- Detail the overall contract staffing plan for the Transition project and the Managed Services operations, including:
 - ▶ Roles & number of resources allocated in each role;
 - ▶ Nominal assignments in key roles.
- Provide a dedicated full-time functional consultant – as a key role – to support IIE business needs under the Managed Services contract.
- Include resumes of all key resources as attachments.
- Provide firm commitment that all listed key resources are going to be assigned to the Transition project and the Managed Services operations (as applicable), should the Offeror be awarded the contract.

The Offeror shall commit to:

- Notify IIE about any change in allocated key resources, in writing, at least two (2) weeks prior to the change;
- Allocate an equally qualified replacement resource with no interruption in delivery;
- Submit the resume of the proposed replacement resource to IIE and obtain IIE's written acceptance;
- Provide visibility to IIE into a resource transition plan of minimum two (2) weeks duration.

4.5 Cost Proposal

The Cost Proposal shall present a detailed and deliverable-based budget for the products and services described in the Technical Proposal. IIE's review of the Cost Proposal shall determine if the overall costs proposed:

- ▶ Are realistic for the work to be performed;
- ▶ Reflect a correct understanding of the engagement requirements;
- ▶ Are consistent with the Offeror's Technical Proposal.



As part of their Cost Proposal, Offerors are requested to submit the information and documentation listed below:

4.5.1 Transition Project Delivery Costs

- Present the projected costs for completing the deliverables and meeting the milestones described in your Technical Proposal.

Quote summary costs related to completion and acceptance of deliverables and achievement of milestones, rather than activities and time worked.

- Ensure that the projected costs are consistent with the schedule of deliverables and milestones presented in the Technical Proposal.

IIE is looking for an unequivocal relation between deliverables/milestones, their corresponding due dates and their corresponding prices.

For example:

- ▶ If your chosen methodology is Agile/Scrum, you may want to structure your proposal into Releases and Sprints.
 - ▶ If your chosen methodology is Waterfall, you may want to structure your proposal into Environment completion and acceptance.
- List all costs in **US Dollars (\$)**.
 - Be as detailed/granular as possible.
 - Make sure that all the projected cost types are listed, including (as applicable), but not limited to:
 - ▶ Material costs: equipment & supplies;
 - ▶ Software licenses;
 - ▶ Labor & consulting costs;
 - ▶ Travel & accommodation.
 - Make sure to specifically quote the rate card for access to expert resources beyond dedicated roles (and ensure access to them using the budgeted hours), as well as other roles.

The rate card quoted will be included in the Master Service Agreement (MSA) to be signed/extended with the selected vendor.

- You may use your own form, worksheet, printout from a budgeting tool etc.

In any case, though, it is recommended that you follow the major categories listed in the table template provided below:



Cost Item	Quantity & UM	Unit Price (\$)	Total Price (\$)
Discovery			
•			
•			
•			
Planning			
•			
•			
•			
Implementation			
•			
•			
•			
Post-Implementation			
•			
•			
•			
TOTAL			

4.5.2 Transition Project Billing Schedule

- Present the proposed billing/invoicing schedule for transition project delivery.
Present the billing schedule in relation to completion and acceptance of deliverables and achievement of milestones, rather than activities and time worked.
- Ensure that the billing schedule is consistent with the schedule of deliverables and milestones and the corresponding acceptance criteria presented in the Technical Proposal.

For example:

- ▶ If your chosen methodology is Agile/Scrum, your billing schedule will likely be structured by Releases and Sprints.
- ▶ If your chosen methodology is Waterfall, your billing schedule will likely be structured by environment completion and acceptance.

4.5.3 Operation Managed Services Costs

- Document post-project managed services offering / available SLA package choices, including:
 - ▶ Monthly maintenance costs;
 - ▶ Allotted hours for support;
 - ▶ Allotted hour for development;
 - ▶ Response and resolution KPIs.

4.5.4 Operation Managed Services Billing Schedule

- Present the proposed billing/invoicing schedule for long-run managed services delivery.

4.6 Demonstration

The Offerors who rank within Top 3 – after evaluation of their Company Information, Technical Proposal and Cost Proposal – will be invited to present a Demonstration of their services and capabilities offering.

Selected (invited) Offerors are requested to prepare their Demo based on the following considerations:

- Offerors should plan for a Demo session timeboxed to two (2) hours, including a 10 min. mid-time break.

Demo sessions will start and end on time as scheduled, with no extension allowed.

- Offerors should consider allocating enough time for discussions and questions & answers (Q&A).
- Offerors must demonstrate their capabilities as requested in Appendix B. Demo of Capabilities.

The capability demonstration may be presented in any suitable form, such as:

- Demo of capability scenarios;
- Slide deck presentation summarizing the capabilities;
- Capability document/specification review;
- etc.

IIE does not require any specific order for demonstrating each capability area, but does require that ALL listed capabilities be demonstrated.

Failure to address any of the listed capabilities will result in lower demo scores.

- Offerors should focus on making sure their demo is directly responsive to the showcasing requested, is concise and complete – to the point, and is delivered within the allocated session time.

Demos that lack focus, fail to address the essence of each capability, or divagate from the agenda will receive lower scores.

4.7 IT Security Assessment

Following full evaluation of Offerors' RFP participation – in accordance with all the Evaluation Criteria described below – **the winning Offeror and the first runner-up** will be asked to undergo the IIE's Third-Party IT Risk Management Process (TPRM).

Completing an IT Security Questionnaire will be required prior to signing a contract, if the Vendor will process IIE proprietary data or Personal Data (according to GDPR's definition) on behalf of IIE, or will connect to IIE's network.

- Vendors who can provide evidence of an ISO 27001 Certification are asked to attach such documentation and to submit their up-to-date System and Organization Controls (SOC) 2 Type 2 Attestation.
- Vendors who cannot provide evidence of ISO 27001 Certification will be asked to submit a SOC 2 Type 2 Attestation and complete a security assessment mapped to the National Institute of Standards and Technology (NIST) Cyber Security Framework (CSF).

NIST is a guidance – based on existing standards, guidelines and practices – for organizations to better manage and reduce cybersecurity risk.

The NIST CSF consists of five concurrent and continuous Functions: Identify, Protect, Detect, Respond, Recover. When considered together, these Functions provide a high-level, strategic view of the lifecycle of an organization's cybersecurity risk management.

- IIE uses the third-party OneTrust platform to complete the security assessment.
- The RFP Contact (or the IIE Project Manager, or the IIE Project Sponsor – if different) will automatically initiate the IT TPRM process.
If you are the winning Offeror or the first runner-up, you are encouraged to coordinate with the RFP Contact to ensure this process is kicked-off.
- When the process is initiated, you will receive an email with a link and instructions directly from OneTrust.
The time to complete the assessment is completely dependent on your response time: the sooner you complete the questionnaire, the shorter the assessment time.
- If your organization does not wish to complete this request using the automated OneTrust platform, you have the option to visit the "Welcome" screen of the IT Security Questionnaire (using the emailed link from OneTrust) and click "Complete Offline Using Excel", to download the Excel version of the NIST CSF assessment. Make sure to upload the completed file to OneTrust using the same path and Submit it.



5. Evaluation Criteria

IIE will select the Offeror whose proposal package represents the best overall value to IIE in terms of the selection criteria specified below. Offerors who do not follow the instructions in this RFP may be disqualified from consideration.

Offers must first and foremost meet the mandatory requirements, before their Technical and Cost Proposals are reviewed. Bids not meeting the mandatory requirements will be rejected.

The following table summarizes the evaluation approach:

Evaluation Section	Evaluation Criteria	Scoring
Mandatory		Pass/Fail
	<ul style="list-style-type: none"> Offeror organization is legally registered to do business in the United States: Offeror provided a copy of its registration document along with the Technical Proposal. 	Yes/No
	<ul style="list-style-type: none"> Offer passed IIE’s Responsibility Determination: IIE checked and confirmed that the final offer was not listed under terrorism list of U.S. Treasury Department, United Nations, and was not listed as an excluded party under the System for Award Management www.sam.gov. 	Yes/No
RFP Proposal		100 points
Part A: Company Info	<ul style="list-style-type: none"> Offeror provided proven documentation of: <ul style="list-style-type: none"> Industry position, organization stability, overall expertise; Expertise directly relevant to the RFP: <ul style="list-style-type: none"> Expertise in the cloud platform selected for hosting PeopleSoft environments; PeopleSoft general expertise and accreditation; PeopleSoft Managed Services expertise; PeopleSoft project management expertise; Experience directly relevant to the RFP: <ul style="list-style-type: none"> Background of PeopleSoft Managed Services delivery; Positive testimonials from referenced previous clients (min. 3). 	20 points



Evaluation Section	Evaluation Criteria	Scoring
Part B: Technical Offer	<ul style="list-style-type: none">● Offeror’s Technical Proposal met the expectations:<ul style="list-style-type: none">▪ High-quality:<ul style="list-style-type: none">▶ Well-structured/organized, to-the-point;▶ Professionally presented;▪ Complete:<ul style="list-style-type: none">▶ Meeting all RFP/info requirements – including specific requirements listed below:<ul style="list-style-type: none">- Including proposals for both Transition Project delivery and Managed Services delivery;- Including proposed resource roles & resumes;- Including proposed SLA;- Including rate card;▪ Compelling:<ul style="list-style-type: none">▶ Demonstrating good overall understanding of RFP content and IIE needs;▶ Demonstrating cost-effective Managed Services capabilities for IIE benefit;▪ Compatible:<ul style="list-style-type: none">▶ Providing Managed Services as requested – per SOW/SLA specs (operationally);▶ Providing Project Management as requested – per PMO methodology (occasionally).	35 points

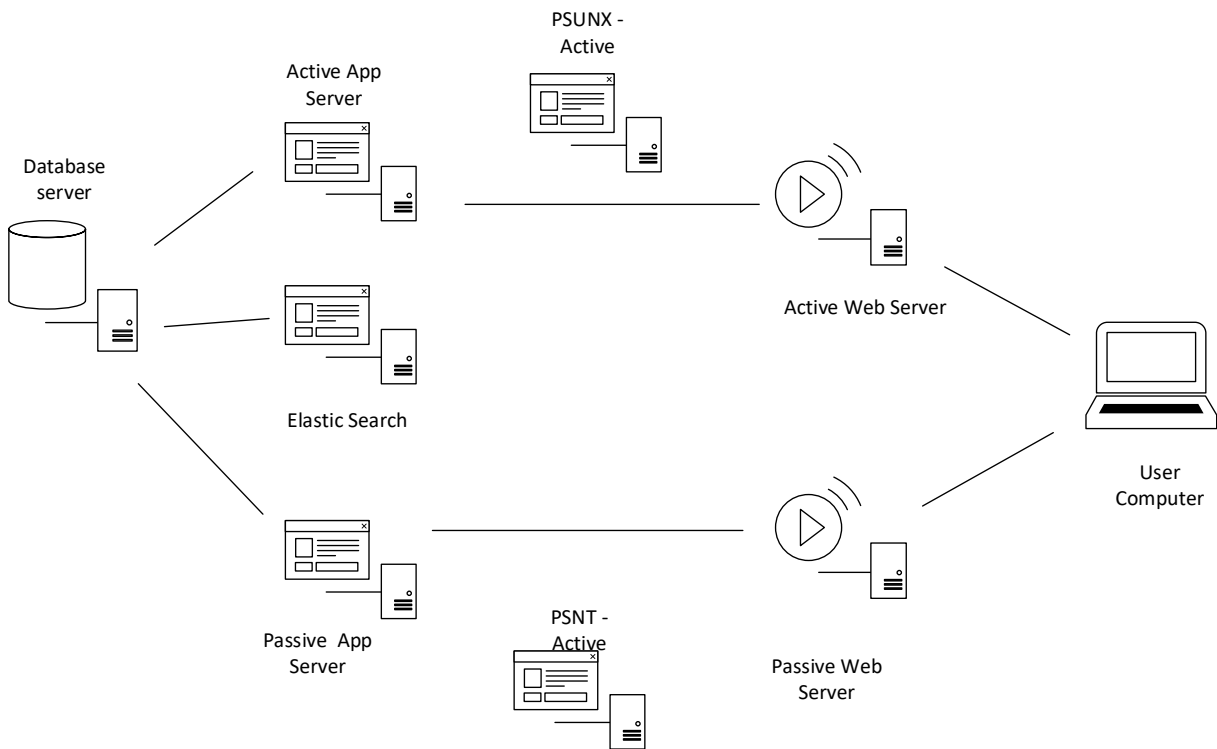
Evaluation Section	Evaluation Criteria	Scoring
Part C: Cost Offer	<ul style="list-style-type: none"> ● Offeror’s Cost Proposal met the expectations: <ul style="list-style-type: none"> ▪ Complete: <ul style="list-style-type: none"> ▶ Proposed budget matching contents of Technical Proposal; ▶ Including cost proposals for both Transition Project delivery and Managed Services delivery; ▶ Including cost for provisioning a dedicated full time functional consultant supporting IIE business needs under the Managed Services contract; ▪ Realistic: <ul style="list-style-type: none"> ▶ Acceptable Vendor quotations (per current market standards). 	25 points
Part D: Demo	<ul style="list-style-type: none"> ● Offeror’s Demo met the expectations: <ul style="list-style-type: none"> ▪ Complete: <ul style="list-style-type: none"> ▶ All demo cases properly addressed during the allocated time; ▪ Relevant: <ul style="list-style-type: none"> ▶ Demonstrated understanding of IIE needs; ▶ Demonstrated valuable expertise in the subject area; ▶ To-the-point info provided (not generic one-fits-all demo); ▪ Professionally delivered: <ul style="list-style-type: none"> ▶ Well planned, well timed, well presented (well rehearsed, if needed); ▶ Q&A time properly allocated; ▶ Referenced materials provided one business day pre/post demo (e.g. slide decks, docs, specs). 	20 points

Appendix A. Current Infrastructure & Configuration

IIE has implemented PeopleSoft HCM in 2015 (HR, Benefits and Payroll Interface) and PeopleSoft FSCM in 2016 (Grants, Contracts, Billing, Cash Management, Accounts Receivables, Accounts Payables, eProcurement, Purchasing, General Ledger).

Description	HCM	FSCM
Application Version	9.2	9.2
Application PUM version	PUM 45	PUM 46
People Tools version	8.59.xx	8.59.xx
Database Version - Oracle	19 G	19 G
OS	Linux - OEL7	Linux - OEL7
Web Server	Linux - OEL7	Linux - OEL7
Windows Server	2019	2019
Database Server	Linux - OEL7	Linux - OEL7

HCM Production Architecture



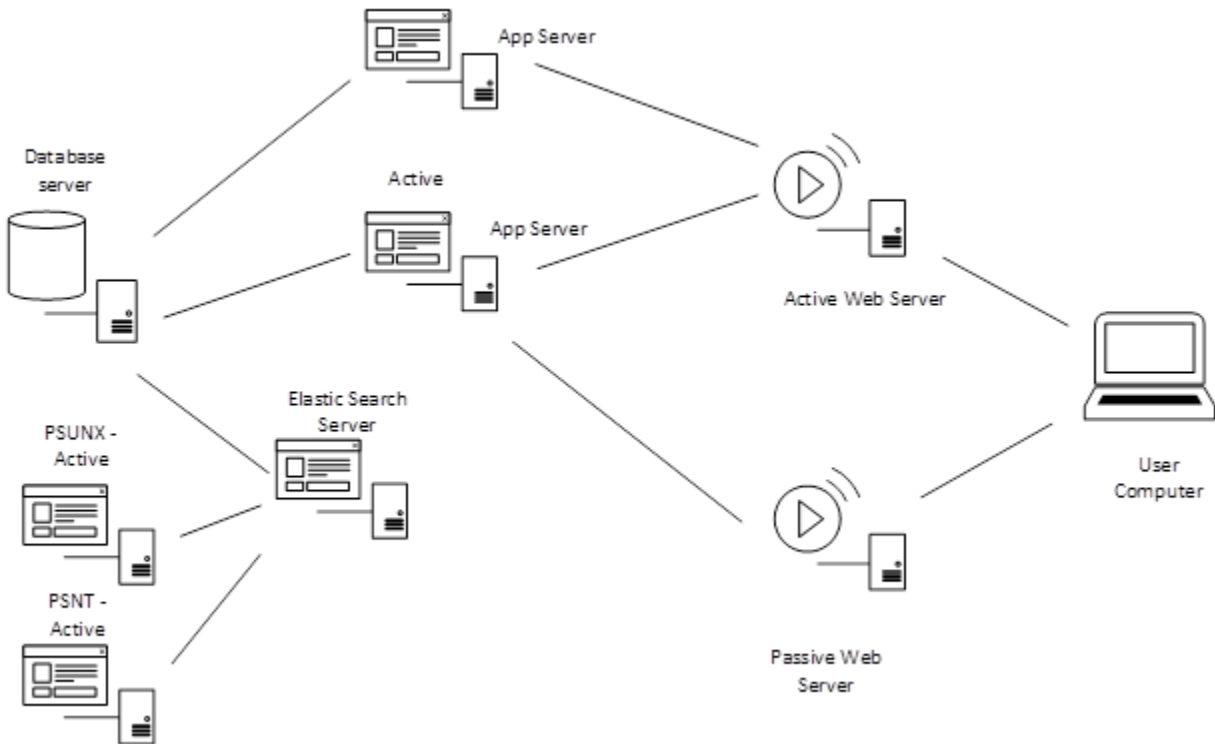


HCM Environment Details: IIE HCM 9.2.45 & PeopleTools 8.59.10

Environment	OS	Server_Type	CPU	Disk Space
Jump server				
SMTP - localhost port 25 (ESMTP setup locally on all servers)				
Demo	Windows 2019	Web/App/Pracs	APPDOM	peoplesoft
HCDV1	Linux - OEL7	Appserver/Web	4	100G
	Linux - OEL7	Psunx	4	100G
	Windows 2019	Psnt	4	399Gb
	Windows 2019	Es	8	399Gb
	Linux - OEL7	Database	16	700G
HCDV3	Linux - OEL7	Appserver/Web	4	100G
	Linux - OEL7	Psunx	4	100G
	Windows 2019	Psnt	4	D:\ 499Gb
	Windows 2019	Es	8	D:\ 399Gb
	Linux - OEL7	Database	16	700G
HCQA1	Linux - OEL7	Appserver/Web	4	100G
	Linux - OEL7	Psunx	4	100G
	Windows 2019	Psnt	4	D:\ 499Gb
	Windows 2019	Es	8	D:\ 399Gb
	Linux - OEL7	Database	16	700G
HCMUPG	Linux - OEL7	Appserver/Web	4	100G
	Linux - OEL7	Psunx	4	100G
	Windows 2019	Psnt	4	D:\ 399Gb
	Windows 2019	Es	8	D:\ 399Gb
	Linux - OEL7	Database	16	700G
HCQAUPG	Linux - OEL7	Appserver/Web	4	100G
	Linux - OEL7	Psunx	4	100G
	Windows 2019	Psnt	4	D:\ 499Gb
	Windows 2019	Es	8	D:\ 399Gb
	Linux - OEL7	Database	16	700G

Environment	OS	Server_Type	CPU	Disk Space
HCPRD	Linux - OEL7	Appserver	4	100G
	Linux - OEL7	Appserver	4	100G
	Linux - OEL7	Psunx	4	100G
	Linux - OEL7	Web	4	100G
	Linux - OEL7	Web	4	100G
	Windows 2019	Psnt	4	D:\ 399Gb
	Windows 2019	Es	8	D:\ 699Gb
	Linux - OEL7	Database	8	100G

FSCM Production Architecture





FSCM Environment Details: IIE FSCM 9.2.46 & PeopleTools 8.59.10

Environment	OS	Server_Type	CPU	Disk Space
Jump server				
SMTP - localhost port 25 (ESMTP setup locally on all servers)				
Demo	Windows 2019	Web/App/Pracs	APPDOM	peoplesoft
FSDV1 / FSUPG	Linux - OEL7.9	Web/App	29GB	400gb
	Linux - OEL7.9	psunx	29GB	400gb
	Windows 2019	PSNT	30gb	500gb
	Windows 2019	ES	60gb	850gb
	Linux - OEL7.9	Database	117gb	3.7TB
FSDV3	Linux - OEL7.9	Web/App	29gb	400gb
	Linux - OEL7.9	psunx	29gb	400gb
	Windows 2019	PSNT	30gb	500gb
	Windows 2019	ES	60gb	850gb
	Linux - OEL7.9	Web/App	29gb	400gb
FSQA1 / FSQAUPG	Linux - OEL7.9	Web/App	29gb	400gb
	Linux - OEL7.9	psunx	29gb	400gb
	Windows 2019	PSNT	30gb	500gb
	Windows 2019	ES	60gb	850gb
	Linux - OEL7.9	Web/App	29gb	400gb
FSRED	Linux - OEL7.9	Web/App	FSRED	FSRED
	Linux - OEL7.9	psunx	NA	NA
	Windows 2019	PSNT	NA	NA
FSPRD	Linux - OEL7.9	APP	29gb	400gb
	Linux - OEL7.9	APP	29gb	400gb
	Linux - OEL7.9	Web/APP FSPRD - main FSPRDINT - IB	29gb	400gb
	Linux - OEL7.9	Web	29gb	400gb
	Linux - OEL7	PSUNX	29gb	400gb
	Windows 2019	PSNT	30gb	400gb



Environment	OS	Server_Type	CPU	Disk Space
	Windows 2019	ES	50gb	850gb
	Linux - OEL7.9	Database	31gb	1.7TB

HCM & FSCM Interfaces

- 11 interfaces for HCM;
- 9 interfaces for FSCM.

Appendix B. Demo of Capabilities

IIE is interested in Offerors showcasing the following:

1. Support Structure:

- ▶ SLA;
- ▶ Ticket/Incident fulfillment;
- ▶ Production Support provisioning;
- ▶ Non-production Support provisioning;
- ▶ Escalation procedure;
- ▶ Team Structure (Account Manager/Service Manager, size of team offshore/onshore).

2. Documentation:

- ▶ Run Book;
- ▶ Ticket Look-up;
- ▶ Transition Planning (Contingency/ Knowledge Transfer/Handover procedures).

3. Maintenance:

- ▶ Server Patching & Upgrades;
- ▶ Application Patching;
- ▶ Application Upgrades;
- ▶ Disaster Recovery (Backup/Restore).

4. Monitoring:

- ▶ Application Monitoring;
- ▶ Infrastructure Monitoring.

5. Application Development / SDLC:

- ▶ Customizations;
- ▶ Integrations;
- ▶ Reports;
- ▶ Fluid Development.

6. Information Security:

- ▶ Application Security;
- ▶ Server Security;
- ▶ Data Security;
- ▶ Compliance - Industry/SOC;
- ▶ Audit Support.

Appendix C. List of Acronyms and Abbreviations

Acronym	Description
A	
AWS	Amazon Web Services
B	
B&FO	Best & Final Offer
BFO	Best and Final Offer
C	
CSF	Cyber Security Framework
D	
E	
ERP	Enterprise Resource Planning
F	
FFP	Firm Fixed Price
FSCM	Financial Supply Chain Management
G	
H	
HCM	Human Capital Management
I	
IIE	Institute of International Education
IO	International Office
J	
K	
KPI	Key Performance Indicator
L	
M	
MSA	Master Service Agreement
N	
NDA	Non-Disclosure Agreement
NIST	National Institute of Standards and Technology
NOI	Notification of Intent
O	
OCI	Oracle Cloud Infrastructure
P	



Acronym	Description
PfM	Portfolio Management/Manager
PgM	Program Management/Manager
PM	Project Management/Manager
PMO	Project Management Office
PS	PeopleSoft
Q	
Q&A	Questions & answers
R	
RFP	Request for Proposal
S	
SLA	Service Level Agreement
SOC	Security Operations Center
SOC	System and Organization Controls
SOW	Statement of Work
T	
T&M	Time & Materials
TPRM	Third-Party IT Risk Management Process
U	
UM	Unit of Measurement
V	
W	
X	
Y	
Z	