



C o u n t y o f S a n L u i s O b i s p o

General Services Agency

Janette D. Pell, General Services Agency Director

Helen McCann, Department Administrator

REQUEST FOR PROPOSAL PS RFP# 1000-08 SAP TECHNICAL UPGRADE CONSULTING SERVICES

August 22, 2008

The County of San Luis Obispo is currently soliciting proposals for professional services for SAP Technical Upgrade Consulting Services. The County will be upgrading SAP from version 4.7 to SAP ECC 6.0.

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception may be grounds for rejection. The County of San Luis Obispo reserves the right to reject all proposals and to waive any informalities.

County of San Luis Obispo
Phill Haley, Central Services
1087 Santa Rosa Street
San Luis Obispo, CA 93408

Proposals must be received by mail, recognized carrier, or hand delivered no later than 3:00 PM PST on September 19, 2008. Late proposals will not be considered. Submit six (6) printed copies and six (6) electronic copies of your proposal. The original submission shall be clearly marked "ORIGINAL." A representative authorized to commit the proposing entity in contractual matters must sign the copy marked "ORIGINAL". All printed copies of the Proposals submitted in response to this RFP shall be typed on 8½" x 11" white paper, printed on two sides, and place in ½" to 1" binders or similar notebooks or secure them with a metal clip. Electronic copies shall be submitted on CD-ROM in Microsoft Word 2003 **and** Adobe PDF file formats; proposed project plans shall be submitted in Microsoft Project 2003 **and** Adobe PDF file formats.

If you have any questions about the proposal process, please contact **Phill Haley, Buyer, at (805) 781-5904**. All other questions pertaining to the content of the proposal must be made in writing via e-mail to Jim Erb at jerb@co.slo.ca.us with "**SAP UPGRADE PROJECT**" in the subject line of the message. All questions will receive a response within two business days. The question and its response will be posted (anonymously) on the SAP Upgrade Requirements RFP Internet site: <http://www.slocounty.ca.gov/GSA/Purchasing>, except that the County reserves the right to determine the appropriateness of comments/questions that will be posted on the website.

PHILL HALEY
Buyer – General Services Agency
phaley@co.slo.ca.us

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Introduction

San Luis Obispo County is located on the Central Coast of California, approximately 200 miles south of San Francisco and 200 miles north of Los Angeles. The population of San Luis Obispo County is approximately 264,900. The largest incorporated city is the City of San Luis Obispo with a population of approximately 44,000.

The County is governed by a non-partisan Board of Supervisors. The County has a major responsibility for providing health and human services, elections, public safety (shared with some of the incorporated cities), county jail services, probation services, airport facilities, parks and recreation, maintenance of county roads and infrastructure, and housing for the courts.

The county budget is a legally adopted budget and is organized by Fund Centers which represent various departments. The county has approximately 2,700 employees and is the second largest employer located in the county.

In September 2003 the County began implementing SAP version 4.7 EA-PS 20. The County went live with the financial related modules of SAP in January 2005 and the human resources/payroll related modules in December 2005.

1.0 Local Vendor Preference

The County of San Luis Obispo has established a local vendor preference. All informal and formal proposals for contracts will be evaluated with a 5% preference for local vendors except when State law or other law or regulation precludes use of a local preference.

A "local" vendor will be approved as such when:

1. It conducts business in an office with a physical location within the County of San Luis Obispo;
2. It holds a valid business license issued by the County of San Luis Obispo or a city within the County of San Luis Obispo; and
3. Business has been conducted in such a manner for not less than six (6) months prior to being able to receive the preference.

As of March 3, 1994 individual County Buyers evaluate Proposals considering the local vendor preference described above. The burden of proof will lie with Vendors relative to verification of "local" vendor preference. Should any questions arise, please contact **Phill Haley, Buyer, at (805) 781-5904**. All prospective Vendors are encouraged to quote the lowest prices at which they are willing to furnish the items or services listed in County Request for Proposal.

All Vendors shall include in their proposal a completed and signed Local Preference Questionnaire found in Attachment 1.

2.0 PROPOSAL SUBMITTAL AND SELECTION

- a. All proposals, original plus five (5) copies and six (6) electronic copies, must be received by mail, recognized carrier, or hand delivered no later than 3:00 p.m. on September 19, 2008. Late proposals will not be considered.
- b. All correspondence should be directed to:

San Luis Obispo County
Department of General Services
1087 Santa Rosa Street
San Luis Obispo, CA 93408
ATTENTION: Phill Haley
Telephone: 805-781-5904
- c. Costs of preparation of proposals will be borne by the proposer.
- d. It is preferred that all proposals be submitted on recycled paper, printed on two sides.
- e. Selection of qualified proposers will be by an approved County procedure for awarding professional contracts.
- f. This request does not constitute an offer of employment or to contract for services.
- g. The County reserves the option to reject any or all proposals, wholly or in part, received by reason of this request.
- h. The County reserves the option to retain all proposals, whether selected or rejected.
- i. All proposals shall remain firm for 180 days following closing date for receipt of proposals.
- j. The County reserves the right to award the contract to the firm, who presents the proposal which in the judgment of the County, best accomplishes the desired results, and shall include, but not be limited to a consideration of the professional service fee.
- k. Selection will be made on the basis of the proposals as submitted. The Selection Committee may deem it necessary to interview applicants. The County retains the right to interview applicants as part of the selection process.
- l. The proceedings of the Selection Committee are confidential. Members of the Selection Committee are not to be contacted by the proposers.
- m. The total number of pages must not exceed one hundred (100) pages, double-sided.
- n. Do not spiral bind the proposal. Place proposals in ½" to 1" binders or other similar notebooks, or secure them with a metal clip that can be easily removed.

3.0 PROPOSAL FORMAT

A qualifying proposal must address all of the following points:

3.1 Project Title – “SAP Technical Upgrade Project, SLO County”

3.2 Applicant or Firm Name

3.3 Firm Qualifications (see sections 9.1 and 9.2)

- a. Type of organization, size, professional registration and affiliations.
- b. Names and qualifications of key personnel, consultants, subcontractors, or joint venture firms to be assigned to this project.
- c. Outline of recent projects completed that are directly related to this project. Consultant is required to demonstrate specific design and project expertise relating to the requirements of the Project Scope. Public Sector experience is preferred.
- d. Three client references from recent related projects, including name, address and phone number of individual to contact for referral.

3.4 Understanding of, and Approach to the Project (see section 9.3)

- a. Summary of approach to be taken.
- b. Description of the organization and staffing to be used for the project.
- c. Indication of information and participation the proposer will require from County staff.
- d. Indication of time frame necessary to complete the plan review once a Notice to Proceed is issued.

3.5 Project Fees (see section 9.4)

- a. Propose total fees to complete the project as described under Project Scope.
- b. Provide additional costs, if applicable, for bulleted items listed in Section 9.4

3.6 Services Contract Example Request

- a. Provide an example of the contract you would be submitting should your firm be selected.

4.0 Pre-Proposal Conference and Estimated Timeline

4.1 Pre-Proposal Conference

An optional pre-proposal conference will be held on Friday, August 29, 2008 at 1:00pm PDT, at:

1055 Monterey St., Room D220
County Government Center
San Luis Obispo, CA 93408

To attend this conference, please call Betty Mahoney at (805) 781-5041 by 5:00pm, on August 28, 2008 to make arrangements. You can also attend via Conference Call by dialing 805-788-2973, at the voice prompt press the number 9 to enter the meeting. The meeting pass code is 2973*.

4.2 Estimated Timeline

RFP Released	August 22, 2008 – Copies will be mailed upon request.
Pre-Proposal Conference	Friday, August 29, 2008 at 1pm (PDT)
Questions on RFP Contents	Contact Jim Erb at 805-788-2964 or e-mail to jerb@co.slo.ca.us
Proposals Due	September 19, 2008 by 3:00 pm (PDT)
Proposal Evaluations	October 3, 2008
Proposers Notified	October 10, 2008

5.0 Overview and Expected Outcomes

5.1 Overview

The County of San Luis Obispo (SLO or County) is seeking proposals for professional services to partner with the County's in-house SAP support team for an SAP upgrade from the Enterprise 4.7 to Enterprise Resource Planning Central Component (ECC) 6.0 version, including an upgrade from 6.0 to the 7.0 release of Portal.

The County's SAP environment is Windows/Intel based, running a total of approximately 2700 users, 2300 of whom are strictly Employee Self Service (ESS) Portal users. The current modules in use by the County are listed below in table 6.1. The County expects to include a migration from MS SQLServer 2000 to 2005, and a migration from 32 to 64 bit hardware and MS Windows operating system. Additionally, where feasible and supported by SAP, the County will run various servers within various layers of the landscape in a virtual environment using VMWare.

The scope of the project includes project planning including hardware specifications, installation, testing, implementation, County support team skills development and the development of a draft roadmap for future planning, looking ahead three years.

The expected outcome from this project are the DEV, QAS and PRD layers fully migrated to ECC 6.0, running without errors.

5.2 Lead Contractor and Consortiums

SLO County intends to award a single, responsive, responsible offer, but also encourages the development of a consulting team made up of qualified individual consultants from one firm or a consortium of firms.

If you are proposing as part of a team or consortium of firms, the lead contractor must submit a single proposal that includes Memoranda of Understanding (MOU) between all consultants or consulting firms that clearly identifies the individual consultants (by name) that will work on this project and what their roles shall be.

The lead contractor shall guarantee that the individual consultants referenced in their proposal and MOU are the actual assignees that will be working on the project. Substitutions of any individuals shall only be accepted and approved in writing by an authorized County Agent during contract negotiations. The County reserves the right to terminate the contract if replacement consultants that are satisfactory to the County cannot be identified by the Contractor.

The county may also use independent contractors, in conjunction with the consulting firm, for specific functional areas such as payroll and time management.

5.3 Funding

The County has budgeted funds for this project and must operate within budget, funding, and allowable expense constraints. The County anticipates consulting costs up to approximately \$400,000 including all expenses. Final contract approval is dependent on the acceptance by the Board of Supervisors and approval of the required funding appropriations.

Expenses can include consultant(s) cost per hour, and actual expenses for travel, lodging, and meals. Expenses must be reasonable, affordable and justifiable. The County travel policy provides reasonable guidelines (see section 9.4).

5.4 Contract Period

If a contract is awarded as a result of this RFP, it shall potentially be for a one (1) year period beginning on or around December 1, 2008. The County reserves the right to withdraw this RFP at any time, re-issue a subsequent RFP, or terminate any resulting contracts at any time.

5.5 Evaluation Process and Score Summary

Written Response

Each evaluator shall independently assign a score to each evaluation criterion based on the written proposals. Criteria scores will then be summed. If San Luis Obispo County does not elect to have an oral evaluation, the award will be given to the highest scoring proposal based on the written proposals.

Optional Oral Evaluation

If it is determined to be in the best interest of the County, an oral evaluation will be scheduled. The Proposers with the highest scores (**not more than 3**) will be invited to an oral tele-conference evaluation with the evaluation committee and members the SAP project team. The consultants named in the proposal will be included in the oral evaluation. The same criteria used to evaluate the written proposals will be used to evaluate the finalists during the oral evaluation. No additions, deletions or substitutions may be made to proposals during the oral evaluations that cannot be viewed as clarification.

After the oral evaluation, each evaluator shall independently assign a score to each evaluation criterion and the criteria scores for the oral evaluation will be summed. The oral evaluation scores and the written evaluation scores will be summed resulting in a final score.

Proposers must complete all questions under Section 9. Limit your responses as instructed for each question. These questions are to determine whether the Proposers have the qualifications to provide the required services. These questions will focus on past experience, consultant qualifications, approaches, and cost.

Proposers must receive enough points to have earned at least 70% of the available points. Proposers failing to achieve 70% of total points will not be eligible to receive a contract award under this procurement.

Company History and SAP Experience	45
Individual Consultant Qualifications	50
Plan, Approach, Timeline	45
Costs	60
	200 Points Possible
	70% = 140 Points

Consulting firms that qualify for local vendor preference will receive an additional 10 points.

6.0 Current Specifications

6.1 SAP Modules in Use

Area	SAP Modules
Financial	General Ledger (FI), Special Purpose Ledger (SPL), Funds Management (FM), Accounts Payable (AP), Accounts Receivable (AR, limited use), Controlling (CO), Project Systems (PS), Fixed Assets (AM)
Logistics	Purchasing (PU), Plant Management (PM), Inventory (INV)
Human Resources	Personnel Administration (PA), Organizational Management (OM), Payroll (PY) (26 pay periods annually), Time Management (PT), Cross Application Timesheet (CATS), Benefits (BN), Employee Self Service (ESS)
Reporting Tools	Report Writer, Report Painter, SAP Query, SAP Script
3 rd Party Add-ons	BSI, Intellicorp Live Compare, Epi-Use Data Sync Manager, Open Text Live Link (Document Imaging), Open Text Archiving, RWD InfoPak
Netweaver	Netweaver 2004 Enterprise Portal EP 6.0, Netweaver 2004s Solution Manager
Help Desk	C-Support – Not limited to SAP User requests – Not an SAP module

6.2 SAP Hardware Platforms in Use

Layer	Type	IBM Model or VM	Specifications
Sandbox	R/3 4.70	VM	2x2.00 GHz, 3 GB RAM
Development	R/3 4.70	x345	2x3.06 GHz/512 KB L2, 4GB RAM
	EP 6.0	x346	2x3.06 GHz/512 KB L2, 8GB RAM
	ITS 6.20	x335	2x3.06 GHz/512 KB L2, 2.5GB RAM
	R/3 4.70	x345	2x 2.8 GHz/512 KB L2/ 2MB L3, 4GB RAM
Quality Assurance	EP 6.0	x346	2x3.06 GHz/512 KB L2, 8GB RAM
	ITS 6.20	VM	2.00 GHz, 2GB RAM
	R/3 4.70	2x x365	2 each of 2x 2.8 GHz/512 KB L2/ 2MB L3, 12GB RAM
		2x x345	2 each of 2x 3.06 GHz/ 1M B L2, 6 GB RAM
Production	EP 6.0	4x x346	4 each of 2x3.06 GHz/512 KB L2, 8GB RAM
	ITS 6.20	2x x345	2 each of 2x3.06 GHz/512 KB L2, 4GB RAM
	R/3 4.70	x345	2x3.06 GHz/512 KB L2, 4GB RAM
Training	EP 6.0	VM	2.00 GHz, 2GB RAM
	ITS 6.20	VM	2.00 GHz, 2GB RAM
	R/3 4.70	VM	4x2.00 GHz, 4GB RAM
Support	R/3 4.70	VM	4x2.00 GHz, 4GB RAM

6.3 Technical Releases/Statistics

Item	Release/Statistic
Current SAP R/3 Version	4.7 EA 200
Current Basis Release	6.20
Current Kernel	6.40 Patch Level 221
Current RBDMS Vendor	Microsoft SQL Server
Current RBDMS Version	2000 8.00.2040 (will upgrade to 2005 before the project)
Current Hardware Platform	IBM
Current Operating System	Windows 2003
Number of SAP R/3 System in landscape	6
Size of production SAP R/3 Database	120 GB
Existing growth of the Production Database	1-3 GB per month
Name Users	3132
Number of Interfaces	46
Number of Sap Script	15
Number of Smart Forms	2
Z Versions of Sap Transactions	10
Modified SAP Code	93
User Exits	14
SAP Query Reports	50
Report Painter/Writer	48

Note: All custom ABAP programs confirmed as Unicode ready using SAP UCHECK transaction.

6.4 Application Statistics

Item	Statistic
Modules Implemented	19
Industry Solution	Public Sector
Number of Company Codes	1
Number of Plants	1
PM Work Orders created in 1 year	10098
Number of Bargaining Units	13
Payroll period	26 to 27

7.0 Project Requirements and Considerations

7.1 Existing SAP Support Structure

Role	Count
Steering Committee	7
EFS Advisory Committee	7
SAP Support Manager (overall)	1
Functional Leads	3
Finance – Functional	3
HR/Payroll – Functional	3
Technical Lead	1
Software Engineers – ABAP	3
Software Engineers – BASIS	3

The County intends to use all of the functional and technical staff, if required, for the upgrade. The contractor should be aware that the Support Team will also be supporting daily operations during the upgrade period. While we will limit any new initiatives, however, there may be times when current operations require our immediate attention.

7.2 Important Considerations

- a. San Luis Obispo County is committed to enhancing the knowledge and abilities of the County SAP Support Team through knowledge transfer when consultants are brought in for project implementations.
- b. Responders should be aware that support and subject matter expert positions will not be backfilled while participating on the SAP upgrade project. The result is that regular work schedules and SAP production support may compete for time and team resources.
- c. The County maintains significant test scripts from its annual SAP patching process and intends to reuse these scripts along with staff from stakeholder departments to complete the final testing process. The County requests that these processes be reviewed near the beginning of the upgrade, thereby allowing time for improvement and modification before entering the testing cycle. County support staff will perform the test scripts in the upgraded clients.

7.3 Consultant Qualifications

The contractor shall provide services in a leadership role to assist the County's SAP support team and stakeholders with the implementation and final acceptance of this project. This shall include knowledge transfer and County SAP technical support staff training for the correct operation of the upgraded version. Consultant(s) selected for this project shall have:

- a. Personal experience with SAP implementation and upgrade projects, and must be qualified to take the lead role in this project.
- b. Experience with public sector solutions of SAP 4.7 and upgrade projects to SAP ECC 6.0 and Portal 7.0 or 7.1 are required.
- c. One individual consultant will be designated as the lead to manage other consultants on the project, working closely with the County's SAP Support Manager or their designee, to ensure the project is progressing as planned. The lead consultant must also provide expertise in at least one technical or functional area germane to the project.
- d. If the selected proposal includes subcontracted consultants, the lead must come from the primary contractor.
- e. Consultants for this project must have experience with at least two SAP installations or upgrade projects in agencies of similar size and scope to San Luis Obispo County.
- f. Consultants for this project must have combined SAP skills in the following areas:
 - Technical skills and journey level experience in BASIS, Security, ABAP, JAVA, Netweaver Development Studio, and the implications of applications using Netweaver.
 - Functional skills and working knowledge experience in all modules listed in section 6.1, for the public sector.
 - Implementing SAP in a VM Ware environment

7.4 Expected Consultant Resources

The County has an initial expectation that the following minimum resources will be supplied by the contractor and that individuals will be named and present supporting qualifications during contract negotiations:

- | | | |
|-----|---------------------------|---|
| (1) | BASIS staff | onsite full-time or as negotiated |
| (1) | ABAP staff | onsite full-time or as negotiated |
| (1) | Project manager | onsite half-time or as negotiated |
| (?) | Periodic functional staff | onsite or offsite as needed for specific issues |

Note:

- Expertise in running in a VMWare environment will be required at times during the project and supporting consultant qualifications must be presented.
- A bucket of functional staff hours should be included to assist with functional problems that arise during the course of the technical upgrade.

7.5 Project Management

The County's SAP Support Manager or their designee will serve as the overall project manager and decision maker. The consultant will provide an experienced project manager to provide a road map and develop and track an actual project plan developed in Microsoft Project.

SAP's Solution Manager will be used where applicable, by agreement between the contractor and the County, for design, documentation, implementation, completion, and final acceptance of this project.

Consultant project management tasks will include, but are not limited to:

- a. Detailed work plan that reflects the journey level knowledge of consultant staff
- b. Coaching for the combined consultant and County project work team
- c. Production planning for a cutover in mid-fiscal year
- d. Emphasize joint consultant-County problem solving
- e. Develop testing schedules
- f. Ensure consultant staff is on-site for agreed upon schedule, to be established in contract negotiation.

7.6 Timeline

It is anticipated that this upgrade project will take approximately 6 months. The project is expected to start on approximately December 1, 2008, and cut over to Production in May of 2009. Contractor(s) must be available at this time to begin working full time on the project, with only approved (in advance by the County) time off. Contractor(s) must be available through project completion.

The project will be deemed complete after a successful payroll and month end fiscal closing has been approved in the upgraded production system.

Contractor shall be expected to specify a detailed timeline for the overall project, as well as to break the project down into measurable phases indicated by project milestones.

7.7 Reporting and Communication Requirements

Contractor will provide bi-weekly progress reports to the County's SAP Support Manager. These progress reports will include a timeline check against the baseline project plan, any concerns or risks to the project, and progress made since the last report. This report should include technical issues discovered and areas for future recommended changes/corrections.

7.8 Project Billing and Accounting

Itemized invoices will be submitted periodically based on project progress and milestones against a schedule to be negotiated.

All invoices shall be prepared on Contractor's letterhead or standard invoice form and shall include; 1) Contractor's name and business contact information, 2) Purchase order number, 3) Date, 4) Billing Period, 5) Detailed billing information.

7.9 Performance Measures

The performance measures and associated project billing and payment will be negotiated between the County's SAP Project Manager/Steering Committee, and the selected contractor. Measures will be based on the scope of work, timeline, and effectiveness of the consultants.

Examples of measures may include:

- a. Milestone delivery
- b. On-time implementation
- c. Initial post-upgrade payroll without errors
- d. Initial fiscal month-end closing without errors
- e. Effectiveness in enhancing the County project team skills

7.10 Indemnification Policy

The County requires that all contracts include the indemnification language developed by our County Counsel and required by the County's Risk Management Department, see Attachment 2.

7.11 Insurance Requirements

The selected Consultant will be required to provide insurance coverage in the amount of \$1,000,000 General Liability Insurance and \$1,000,000 of Professional Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.

The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.

8.0 Scope of Work

8.1 Project Management Tasks

The consultants will be required to perform the following project management tasks for the areas they are assigned:

- a. Provide a detailed work plan for the upgrade that reflects understanding of the SAP system requirements and functionality which will need to be addressed by the County
- b. Provide coaching for the project team, and assist in management of project progress
- c. Provide instruction and assistance in using SAP Solution Manager
- d. Provide a strategy for implementing an upgrade cut-over to SAP ECC 6.0 in mid fiscal year
- e. Identify and address functional and policy issues that will/may arise during the project
- f. Emphasize knowledge transfer, joint problem-solving, and issue discussions in daily interactions with the project staff

- g. Reflect a working attitude and style that emphasizes equality and respect among all team members
- h. Assist County's Project Team members with best methods for troubleshooting problems and contacting OSS to resolve SAP technical issues as timely as possible
- i. Help design and implement adequate testing schedules
- j. Be on-site for at least 40 hours per week, 4-5 days per week (5 days preferred) for relevant portions of the project

8.2 Communication Tasks

Consultants will be required to provide leadership and expertise to:

- a. Assist SAP Project teams with communication and change management to all levels of involved County personnel, as requested by the County.
- b. Identify and document changed functionality and business processes during the upgrade
- c. Provide bi-weekly status reports to the County's project management.

8.3 Technical Upgrade Tasks

Consultants will be required to provide leadership and expertise to:

- a. Upgrade the County's SAP system to ECC 6.0 for all above listed landscape and functional application systems
- b. Support a hardware/OS upgrade with the SAP application upgrade
- c. Provide the best approach to make technical changes in BASIS, Security, ABAP and other programs
- d. Identify any security standards automation tools and/or processes that are recommended or required for SAP ECC 6.0
- e. Assist technical support team to identify best methods, tools, processes, and procedures used to determine what needs to be modified on the ABAP and Netweaver environments
- f. Test technical aspects including security, custom code and programs
- g. Assist technical and development teams to modify all custom reports/interface programs and all modified objects affected by the upgrade
- h. Instruct County development staff in configuration, development and testing (County team will do the actual configuration, program changes, and testing)

- i. Assist County staff in upgrading the Portal and provide the technical support needed to convert customizations.
- j. Understand Unicode conversion and provide the technical support needed to troubleshoot problems.
- k. Ability to troubleshoot issues associated with VM Ware platform.

8.4 SAP Functional Support Tasks

Consultants will be expected to provide the following services for functional application and business process support:

- a. Assist functional teams to test and resolve issues resulting from the upgrade of County's SAP system for all existing configured applications
- b. Provide guidance and assistance in finding and reviewing SAP Delta's from 4.7 to ECC 6.0, highlighting areas that may have more changes and will need greater attention
- c. Assist in testing to identify and adjust configuration for all changed functionality in the County's FI/CO, PS, MM, PM and HR configured system, with special attention for Payroll.
- d. Clearly document the issues, options, and implications of SAP functionality for County business as consultants learn about the County requirements
- e. Instruct The County functional staff in configuration, development and testing (County team will do the actual configuration, program changes and testing)
- f. Help functional teams re-design adequate integration testing scenarios for all existing business processes
- g. Provide guidance and assistance in finding and reviewing SAP Delta's from EP 6.0 (Enterprise Portal 6.0) to EP 7.0 (Enterprise Portal 7.0) highlighting the areas that may have more changes and will need greater attention.

9.0 Proposal Questions and Evaluation Criteria

9.1 Company History and SAP Experience (45 points)

- a. Demonstrate that your firm has the capacity to provide these services within the proposed time frame. Provide a brief history and profile of your company; describe other projects your firm is committed to through the end of calendar year 2008 and 2009. (15 points)
 - Attach a recent financial statement, audited preferred (Labeled attachment A.)
 - If proposer is submitting a proposal as the lead agency providing services through subcontracts, a draft copy of the working agreement or Memorandum of Understanding (MOU) between the lead entity and all the participating subcontractors must be included with the proposal. (Labeled attachment B)

- b. Describe your firm's experience with SAP implementations and upgrades. Discuss how long your firm has been delivering SAP consulting services. (30 points)
- Describe the SAP consulting services you have provided over the last two years. List SAP versions, and functionalities you have implemented. In what capacity were your services provided? For example; functional, technical, project management etc.
 - Describe your experience with SAP functionalities listed in this RFP section 6.1. In particular describe your experience with Solutions Manager, Netweaver, Public Sector Solutions and Upgrades of Payroll from R/3 4.7 to SAP ECC.
 - Describe what makes your firm uniquely qualified to perform the services requested in this RFP.
 - Describe your experience with Public Sector Clients.
 - Describe your experience with implementing SAP on virtual servers, specifically VM Ware
 - Provide 3 references from your SAP clients, (Public Sector preferred) (1 additional page):
 - Reference Contact Name,
 - Company name and address
 - Contact phone number
 - Services Performed

Evaluation Criteria:

- *Proposal demonstrates that the consulting firm is financially sound, and has demonstrated the capacity to provide these services.*
- *Proposal demonstrates recent experience in consulting for an SAP Upgrade from 4.7 to SAP ECC 6.0, experience with Solutions manager, Netweaver, Public Sector solutions, Implementing SAP on virtual servers, and 3 references were provided (Public Sector references preferred.)*

9.2 Individual Consultant Qualifications (50 points)

Describe the qualifications of the consultants who will be assigned to this project should your firm be awarded the contract. Provide assurances that the consultants referenced here will be the ones assigned to the project.

- a. Submit a resume (limit of two pages) for each individual consultant proposed to work on the project. It should include all relevant SAP work and include at least 2 references in the United States. Describe the consultant qualifications to lead the upgrade tasks in the areas of their expertise. Include the functional or technical area(s) of expertise as well as coaching, knowledge transfer, documentation, project planning, or change management, where applicable.

- b. Include a staffing plan using the following format describing the functional, technical or support areas that each consultant would be assigned to. (add rows as needed, limit 1 page)

Consultant Name	Proposed assignment to SAP Area(s) and project roles	Hours Assigned to the Upgrade Project

Evaluation Criteria:

- *Proposed consultant resumes demonstrate the combined, required qualifications as required in section 7.3 of the RFP.*
- *Proposed staffing plan covers all areas of Basis, technical development, Human Resources, Finance, and Logistics functionalities and demonstrate public sector SAP upgrade experience and knowledge of ECC 6.0.*
- *Proposal identifies a lead consultant to work with Project Manager.*
- *Proposed consultant resumes demonstrate experience to facilitate the exchange of ideas for project design, and implementation discussions for decision making*

9.3 Plan, Approach, and Timeline (50 points)

- a. Describe the approach you will take to complete a technical SAP upgrade from 4.7 to ECC 6.0. How will you work with the County resources to plan and manage the required tasks? If the proposal includes subcontracting with other consulting firms, include all resources in your response. (20 points)
- Describe any known technical and functional issues to be addressed with this upgrade, in particular with public sector functionalities, or a mid-year cut-over.
 - Describe of how your consultants will provide leadership in individual areas of expertise, ensuring tasks are completed in a timely manner while working within the framework of the SAP Support Team’s management structure.
 - Describe how you would work with the County Staff; and techniques to provide knowledge transfer to the SAP Support team for skills building such as using the SAP solution manager, testing support, problem resolution, and functional research.
 - Describe your approach to change management and communications.
 - Discuss the consultant and client staffing commitment required to successfully upgrade SAP systems.
 - Provide an example of a bi-weekly report to the County’s Project Management.
- b. Based on the information supplied in Section 7.6 of this RFP, develop a tentative project plan for the County’s SAP Technical Upgrade Project. Include a Timeline with key milestones, decision points, and showing which consultants are available for each phase. (10 points)

Evaluation Criteria:

- *Proposal describes an approach to the project that includes any known technical and functional issues to be addressed with this upgrade, how proposed consultants will work with the SAP Support Team management structure, skills-building and knowledge transfer, change management and communications based on the specifications of Section 7 of this RFP.*
- *Proposal includes a tentative project plan for the County's SAP Technical Upgrade Project including a timeline with key milestones, decision points, and showing which consultants are available for each phase.*

9.4 Costs (60 points)

Prepare an estimated budget plan for the project. List consultant costs by hourly rate.

To use as a guideline, the County reimburses travel expenses at actual cost not to exceed a maximum amount. Current maximum travel reimbursement rates are as follows:

- Lodging = \$150/day
- Meals = \$54/day
- Mileage = \$.585/mile
- Common carrier = actual reasonable cost

Overhead charges should be reasonable and relate to agency administrative fees.

If contractor is an individual or a partnership, and would not be expected to have agency overhead costs, and is including an amount for overhead, please be sure to provide a rationale for that charge; include why those charges are not built into the consultant's hourly rates.

Additional costs, if applicable to include the following, should be responded to individually:

- A Unicode conversion of the database (notes: All locally customized ABAP programs have been confirmed as Unicode ready using SAP UCCHECK transaction, AND we are running with a single code page)
- Upgrade to Portal release 7.1
- Additional use of Solution Manager of the basic functions required for the upgrade
- Implementation of the Manager's Self Service module

Describe any other expenses as fully as possible.

Evaluation Criteria:

- *Consultant prices and expenses as a percentage of total cost appear reasonable and other costs are relevant to the project.*
- *Consultant hours and assignments are consistent with timeline and staffing plan.*

ATTACHMENT 1 – RFP #1000

TO: ALL PROSPECTIVE PROPOSERS

SUBJECT: LOCAL PROPOSERS PREFERENCE

The County of San Luis Obispo has established a local vendor preference. All informal and formal Request for Proposals for contracts will be evaluated with a 5% preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor will be approved as such when, 1) It conducts business in an office with a physical location within the County of San Luis Obispo; 2) It holds a valid business license issued by the County or a city within the County; and 3) Business has been conducted in such a manner for not less than six (6) months prior to being able to receive the preference.

As of March 3, 1994 individual County Buyers evaluate RFP's (Request For Proposals) considering the local vendor preference described above. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200. All prospective proposers are encouraged to quote the lowest prices at which you can furnish the items or services listed in County proposals.

	YES	NO
Do you claim local vendor preference?		
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		
Business Address: _____ _____		
Years at this Address: _____		
Does your business hold a valid business license issued by the County or a City within the County?		
Name of Local Agency which issued license: _____		

Business Name: _____

Authorized Individual: _____ Title: _____

Signature: _____ Dated: _____

ATTACHMENT 2 – RFP# 1000

COUNTY’S INDEMNIFICATION POLICY

SAN LUIS OBISPO COUNTY

CONSULTANT - NON CONSTRUCTION

Indemnification:

Consultant shall defend, indemnify and hold harmless the County, its officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, liabilities or other losses that may be asserted by any person or entity, and that arise out of or are made in connection with the acts or omissions relating to the performance of any duty, obligation, or work hereunder. The obligation to indemnify shall be effective and shall extend to all such claims and losses, in their entirety, even when such claims or losses arise from the comparative negligence of the County, its officers and employees. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the County, its officers and employees.

The preceding paragraph applies to any theory of recovery relating to said act or omission, by the Consultant, or its agents, employees, or other independent contractors directly responsible to Consultant including, but not limited to the following:

1. Violation of statute, ordinance, or regulation.
2. Professional malpractice.
3. Willful, intentional, or other wrongful acts, or failures to act.
4. Negligence or recklessness.
5. Furnishing of defective or dangerous products.
6. Premises liability.
7. Strict Liability.
8. Violation of civil rights.
9. Violation of any federal or state statute, regulation, or ruling resulting in a determination by the Internal Revenue Service, California Franchise Tax Board or any other California public entity responsible for collecting payroll taxes, when the Consultant is not an independent contractor.

It is the intent of the parties to provide the County the fullest indemnification, defense, and “hold harmless” rights allowed under the law. If any word(s) contained herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this contract and the remaining language shall be given full force and effect.

ATTACHMENT 3 – RFP# 1000

Confidential Information Statement

1. California Public Records Act – Although the California Public Records Act (CPRA) recognizes that certain confidential trade secret information may be protected from disclosure, the County may not be in a position to establish that the information submitted in a proposal is a trade secret. If a request is made for information marked “Confidential,” “Trade Secret”, “Proprietary”, or any other similar designation, the County will provide the party submitting such information with reasonable notice to allow the party to seek protection from disclosure by a court of competent jurisdiction.

2. Generally, each proposal and all documentation submitted to the County are not disclosed until the contract is awarded, after which such documents become public records under the CPRA. If a submitting party contends that a portion of the proposal is confidential even under the CPRA, the party: 1) must clearly label each document deemed a trade secret, 2) must actively defend against any request for disclosure of information which the party has determined should not be released, and 3) must indemnify and hold harmless the County from any loss, claim or suit, including attorneys’ fees brought by the person challenging the County’s refusal to release the documents. The County will not, under any circumstances, incur expenses, or be responsible for any damages or losses incurred by a party submitting a proposal or any other person or entity, because of the release of such information. The County will not return the original or any copies of the proposal or other information or documents submitted to the County as part of this RFP process.