

EXHIBIT B
RFQ # 14-03 PeopleSoft Upgrade Consulting Services
Project Management

PROJECT MANAGEMENT

1.1 MINIMUM PERFORMANCE REQUIREMENTS

The requirements are the minimum performance requirements for this RFQ/Project. They are not intended to limit competition nor specify any particular Bidder. All quotes and project plans shall be considered which meet or exceed the summary of work. Any exceptions or alternates must be clearly identified and explained in writing and included in the quote and project plan. The apparent silence of the specifications or any supplemental specifications as to details or the omission from the same of any detailed description concerning any point shall be regarded as meaning only the best commercial practices shall prevail and that only materials and/or services of first quality and correct type, size, and design shall be used. All interpretations of specifications shall be made upon the basis of this clause.

1.2 PERSONNEL QUALIFICATIONS

The successful Bidder warrants and represents that its personnel and/or its subcontracting Personnel have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character and licenses as necessary to perform the services described herein, in a competent and professional manner. If requested, bidder will submit names and qualification description of all staff members and subcontracting Personnel involved in the implementation and testing of said project.

1.3 PROJECT CONFERENCES/MEETINGS

The Contractor will assume the lead in the management of the Project. The Contractor will coordinate the successful execution of the Project and direct all Project activities on a day-to-day basis, with advice and consent of the Project Coordinator. The Contractor will be responsible for all communications regarding the progress of the Project and will discuss with the Project Coordinator any issues, recommendations, and decisions related to the Project.

In an effort to prevent any misunderstanding regarding the scope of the work, all meetings with the users must be attended by a member of the Clerk's Information Technology Department. The Clerk's Office does not expect the user department to be completely familiar with the project scope; therefore, this requirement is mandatory.

The Contractor will be responsible for obtaining and paying for all official permits, approvals, and similar authorizations required by the Clerk and/or any local Palm Beach County Office.

1.4 COMMUNICATION AFTER PROJECT BEGINS

Oral discussions pertaining to the scope of the project must be confirmed through written communication (e-mail, faxes, memos, etc.). At no time will verbal communications be binding to the Clerk.

The Clerk expects the Contractor to be competent in project management skills. To address how project management issues can be minimized, the Bidder's must comply with the following.

1. Project plans (Microsoft Project Plan) should be part of normal daily activities
2. Resource planning should occur in conjunction with the Clerk's IT department.
3. Escalation of project issues should have an established path to account management.
4. Risk and scope management should be included as part of the normal process.
5. Project management should provide reports on progress of project objectives, to ensure continued project support
6. Provide a Project Manager (PM) to oversee all aspects of the project. This project manager will establish a detailed Microsoft Project Plan with roles and responsibilities and a time line for the project.
7. Individual tasks cannot exceed 40 hours. If a task requires more than 40 hours, PM must create a deliverable that can be tracked for end of week reporting.

PeopleSoft Upgrade 9.0 to 9.2 Statement of Work

8. This PM will start the planning and approval process immediately upon notification of award and coordinate plan with the PM.
9. The Contractor's project manager must be committed to this project and excluded from others for the duration of the project. Depending on the scope of the project the PM might be needed to spend a considerable amount of time on site to coordinate and manage the resources of the project.
10. The Contractor's project manager must conduct weekly project status meetings and provide weekly status reports. Meetings may only be skipped with the permission of the Clerk. Conference calls are an acceptable substitute under unusual circumstances.
11. The project plan should be organized in a phased approach that provides achievable and demonstrable milestones and deliverables. The engagement should be managed to meet specific milestones with an established method of reporting project status, including cost management, risk management, scope management, communication management, quality management, time management, procurement management, and integration management.
12. The Contractor will be paid upon achievement of agreed-upon milestones.
13. The Clerk strongly recommends that only one PM be assigned to the contract until completion. The Clerk will not pay for any additional costs associated with the knowledge transfer as the result of changes in the project team. The contractor is responsible for these costs. It is preferred that the Contractor's PM be PMP certified and manage the project utilizing PMBOK principles.
14. The Clerk's IT Department will have complete access to monitor the project and serve to assist all project participants to mitigate risk and mediate issues.

1.5 THE CLERK'S IT RESPONSIBILITIES

1. Clerk's IT will provide access to the data center for project team members as identified in the project plan. Clerk's IT will provide access to system administrators.
2. Clerk's IT will make available telephones, fax machines, copiers and network connections to team members. The vendor is to provide long distance service to their employees.
3. Clerk's IT will provide a meeting room with a data projector for the project team.

1.6 VENDOR RESPONSIBILITIES AND DELIVERABLES

The Contractor will deliver all hardware and software licenses necessary to install and complete the configuration of it as described in the RFQ, this document, and Exhibit B. The installation and configuration includes accessing all data from the Clerk's network through the systems. (Turn-key installation)

1. Vendor hardware and software must be installed by certified vendor engineer.
2. Services to include:
 - a. Installation
 - b. Configuration
 - c. Testing
 - d. Submit a statement of work with the contract