

Common Management System (CMS) Sustainability Request For Proposal No. 90561

Background

The mission of Common Management Systems (CMS) is to provide efficient, effective, and high quality service to the students, faculty, and staff of the 23-campus California State University System (CSU) and the Office of the Chancellor. For more information about the CSU see: <http://www.calstate.edu/>

Utilizing a best practices approach, CMS supports human resources, financials and student services administration functions with a common suite of Oracle Enterprise applications in a shared Unisys managed data center, with a supported data warehouse infrastructure.

Context and Objectives

The CSU is driven to develop a long-range plan for CMS by several factors. The significant budget cuts and projected fiscal austerity make it imperative that CMS is operated as efficiently as possible. The Presidents' Information Technology Advisory Committee (ITAC) has proposed a review of all on-going Information Technology (IT) operations. New system level IT leadership and an expanded CMS Executive Committee bring a fresh perspective to on-going operations. In light of these factors, the CSU is seeking a consultant to:

- Identify strategies to reduce the cost of operating CMS to enable redeployment of resources to other strategic priorities.
- Recommend improvements to CMS governance, operations, and funding practices to contribute to long-term sustainability and to optimize the value of resources invested in CMS.

The recommendations will be documented in a five year plan for CMS.

Scope of Work

In order to develop the sustainability plan the selected consultant will focus on both strategic and tactical issues. At the strategic level, the project will include a review of CMS governance structures, decision-making processes and the near-term priorities for its upgrade and enhancement. The review will include the operations, organization and staffing of the CMS software development organization and evaluate changes that are being considered by CSU to its relationship with Unisys to provide CMS hardware and data center.

The analysis will require CSU to articulate its future direction for CMS and work with the selected vendor to define scenarios for the future. The analysis must be based upon the CSU's priorities for additional enhancements and upgrades to CMS as well as the number of shared vs. individual instances it will support. The selected consultant shall work with the CSU at the outset of the project to identify and validate working assumptions.

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Approach

The project consists of three phases. Phase I will assess the governance and strategy for CMS. Phase II will focus on the staffing and operations of the development and technical services organization and the Unisys relationship. The final phase will synthesize findings and recommendations into a five year plan for CMS sustainability. Upon completion of each phase of the project the CSU shall have the option to authorize the selected consultant to proceed with the next phase of the project or terminate the remainder of the contract. The activities for each phase are described below.

Phase I – Assess CMS Governance and Strategy

1. Review background documents including organization charts, budgets, operating procedures, CMS-Unisys relationship and projections of future workload for CMS support
2. Plan the retreat of the CMS Executive Steering Committee.
 - a. Conduct phone interviews with the Senior Director of CMS and the Chair of the Executive Committee.
 - b. Develop a detailed agenda and breakout exercises for the retreat.
 - c. Review the retreat results in a conference call with CMS leadership.
3. Conduct additional leadership interviews to complete assessment of governance and strategy.
 - a. Conduct in-person or phone interviews with the Executive Vice Chancellor for Finance and Business and the Chief Information Officer (CIO).
 - b. Conduct eight to ten in-person or phone interviews with representatives of existing CMS governance committees (Executive Steering Committee, finance users, Human Resource (HR) users, student users).
4. Document findings and discuss with CIO and Senior Director of CMS by conference call.

Phase II – Review CMS Operations and Staffing

1. Review Development and Technical Services staffing and operations
 - a. Conduct three to five in-person interviews with leaders of the CMS organization.
 - b. Review organizational charts, staffing skill mix and roles and responsibilities.
 - c. Walk through key operating procedures including – project management, development life-cycle, etc.
 - d. Understand baseline workload to support CMS as currently configured and keep pace with required updates.
 - e. Discuss options for reducing workload with CMS leadership.
2. Conduct fifteen to twenty phone interviews with campus stakeholders in CMS services including, functional leaders in HR, finance and student services, CIOs, and CMS project directors to solicit input and feedback on potential strategies to improve sustainability.
3. Review CMS- Unisys relationship
 - a. Interview System CIO and CMS Senior Director to identify potential changes to Unisys relationship.

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- b. Analyze impact on sustainability of proposed changes to scope of Unisys assistance.
4. Document findings and discuss with CIO and Senior Director of CMS in an in-person briefing.

Phase III – Prepare and Present Plan

1. Propose options for improving the sustainability of CMS operations including strategies to:
 - a. Reduce the costs of operating the CMS organization.
 - b. Reduce the costs of supporting CMS through changes to its present and future scope.
 - c. Improving governance and funding practices.
2. Review draft recommendations with System CIO and CMS leadership in an in-person meeting.
3. Present recommendations to Executive Committee.
4. Prepare a final report document findings and recommendations.

Deliverables

The deliverables for this scope of work include:

- An agenda and discussion questions for CMS Executive Committee meeting
- Interim briefings at the end of Phases I and II
- Presentations to Chancellor's Office leadership and the Executive Committee of findings and options for improving sustainability
- Draft and final versions of a written report

Schedule

Due to the criticality of this project, notice to proceed is estimated to be in May 2010.

Estimated duration of each phase:

- Phase I – 2 months from notice to proceed
- Phase II – 1 ½ months
- Phase II – 1 month

Pricing

Professional fees for this engagement shall be on a time and materials basis. Bidder's price proposal shall provide the following:

1. Professional fee rate per day for on-site work
 2. Professional fee rate per hour for off-site work.
 3. Estimated total professional fees for each phase of the project
- Complete and return Appendix A, Cost Proposal with your submittal.

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Professional fee rates proposed shall be fully loaded rates inclusive of all expenses other than travel expenses. (e.g. overhead, G&A, profit, etc.) Travel expenses shall be invoiced at their actual costs and shall be in compliance with CSU travel policies. See CSU travel policy: <http://www.calstate.edu/HRAdm/pdf2008/HR2008-10.pdf>

Invoices may be submitted for payment monthly.

Evaluation

A maximum total of 100 points is available for each proposal as detailed below.

Points will be awarded based on a combination of the vendor's written response and any follow-up initiated by the Chancellor's Office to complete the evaluation process.

The following items will be considered when evaluating vendors:

Criteria	Points
a. Qualification and experience - Evaluation in this category will include expertise and experience of the contractor to perform the work required. Include client references for 3 similar type projects.	45
b. Methodology- Contractor's proposal must show a clear demonstration of the understanding of the work required.	45
c. Cost - Evaluation in this category will be based on the billing rates proposed.	10

The lowest overall combined cost proposal shall receive the maximum points. Points on proposals with a higher overall price shall be determined by dividing the lowest proposal price by the higher proposal price and multiplying by the maximum points as follows:

$$\frac{\text{Cost of Lowest Proposal}}{\text{Bidder's proposal}} \times 10 = \text{Points Awarded}$$

Schedule of Events

Release of bid document: **April 21, 2010**

Last day to submit questions: **April 27, 2010, noon**

Questions will only be accepted via email. Send to: mkojima@calstate.edu

Responses to questions will be emailed to prospective bidders: **April 29, 2010**

Proposal Due Date: May 5, 2010, 11:00 a.m. (PST)

Late proposal will not be accepted.

Contract commencement: **May 10, 2010**

All proposals must be submitted via email by the due date and time to:

Email: mkojima@calstate.edu

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Phone: (562) 951-4591

Format of the Proposal

Please provide a detailed proposal that addresses the areas outlined in the scope of work and the evaluation criteria. The proposal is limited to 30 pages plus any required submission items. Resumes shall be included in page limit. The proposal should include a cover letter identifying the contact people for the firm, person who can negotiate for the firm, etc, and cknowledgement of the firm's intent to provide the work described herein.

CSU Terms and Conditions

See applicable terms and conditions for this project at:

<http://www.calstate.edu/CSP/crl/GP/GP.shtml> Click on "CRL050 CSU General Provisions for Information Technology Acquisitions."