



Appendix A - Statement of Work
System Implementation Services

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Enterprise Resource Planning (ERP) System Implementation Services

1.1 Full Life-Cycle Implementation Approach

As part of the RFP process, BPCA is relying on the Proposer to provide input, from your experience, on a valid implementation approach, which includes sequencing, timeframes, staffing, and estimated costs. The system implemented must meet the requirements for Core HR, Timekeeping, Absence Management and Payroll, attached in **Appendix E - BPCA ERP Requirements Excel workbook**.

Although BPCA will have additional, ongoing projects over the course of this program, BPCA is committed to this program as a top priority.

BPCA expects that a qualified Proposer will be able to utilize the information provided in this RFP along with experience gained from other similar and successful implementations to provide a specific approach, plan, sequence, and staffing estimates/coverage to deliver a high quality implementation for the modules/processes required. We expect that your approach will be both cost-efficient and effective in ensuring that business disruption is minimized and adoption is maximized. In your response, we would like focused attention to the following areas (at a minimum) to describe your implementation approach rationale:

- One of our key objectives is to implement one fully integrated ERP solution across all functions of the organization. This will enable simplification of our ERP/IT environment and will also enable business shared services to be extended to many back-office and field support operations. We think there are two fundamental approaches: (1) deploy process/modules in phased approach; (2) deploy all processes/modules at one time.
- Please provide your recommendation along with your rationale. Highlight the advantages and disadvantages of your recommendation and how you would mitigate any key risks associated with your recommended approach.
- Please describe how the System Integrator proposes to continue to implement subsequent waves while simultaneously providing the necessary site and warranty period support for waves that are already in/have just gone into production.
- Please ensure that the staffing plan and costs are aligned with your recommended approach.
- Please provide all key assumptions.

1.2 Services, Roles & Responsibilities

This section defines the key work streams that are directly related to this project. All services and deliverables performed within the scope of this work will fall into one of the work streams depicted below. Each work stream is described in terms of key activities and responsibilities as well as the minimal set of deliverables that should be produced from each work stream throughout the proposed services.

As part of your response, it is mandatory that the Proposer confirms/refines all responsibilities and defines the complete set of deliverables within each work stream. The deliverables should be mapped to the phase in which they are produced (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support). This will form the basis for specific scope of work for the chosen vendor.

Figure 1. Work Streams



The following outlines the high-level roles and responsibilities of both BPCA and the System Integrator overall and for each deliverable.

The following table identifies the roles and responsibilities associated with the services. The columns on the following tables include:

- PR — Proposer(s), including designated subcontractors
- BPCA — BPCA including affiliates/locations where required

Role Definition:

- R — Responsible for delivery; leads the activity and responsible for all work product and deliverables from the activity
- A — Approval authority
- P — Participates in the completion of the deliverable/activity

BPCA maintains full ownership of this project. However, when the Proposer is in the “Responsible” role for a given deliverable, BPCA expects the Proposer to provide leadership, direction and full accountability for the deliverable, including direction of BPCA personnel assigned to the area.

1.2.1 Program/Project Management & Governance

The Proposer will collaborate with BPCA throughout the program to ensure world-class program/project management and governance processes are defined, designed, executed, and refined, as needed. The table below is provided to ensure clarity and guidance as to BPCA’s expectations within this work stream.

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 1. Program/Project Management & Governance

Roles and Responsibilities	PR	BPCA
Program/Project Management		
Develop Overall ERP Charter	P	R/A
Establish and retain a resourceful BPCA project team who can address all aspects of the project scope and produce the required deliverables	-	R/A
Establish and retain a resourceful System Integrator project team who can address all aspects of the project scope and produce the required deliverables	R	A
Establish procedures for knowledge transfer between BPCA and System Integrator	R	P/A
Provide knowledge of BPCA's Enterprise Strategy, current Operating Model, and future state direction	P	R
Verify that a project budget has been established and that the appropriate tracking mechanisms are in place	P	R/A
Proactively identify System Integrator resource needs throughout the project	R	A
Proactively identify BPCA resource needs throughout the project	P	R/A
Track the overall progress of the project according to the work plan and ensuring that regular status reports are produced, distributed, and reviewed in a timely basis	R	P/A
Verify that regular project/cross-team communications are produced and are available to the core and extended project team members	R	P/A
Develop an issue management process and tracking tool	R	P/A
Monitor and manage project issues	R	P/A
Verify that Quality Assurance procedures and processes are in place that will help generate high-quality work products and deliverables and a final product that meets the business requirements	P	R/A
Develop a risk management plan	R	P/A
Regularly analyze project risks and establish processes and procedures to prevent or manage these risks	R	P/A
Establish procedures and processes for capturing, escalating, and resolving the various types of project issues	R	P/A
Vendor management and handle any additional procurements needed	-	R/A
Governance		
Establish and refine change control procedures and processes throughout the project life cycle	R	P/A
Document and facilitate key design decisions and ensure the right inputs are being provided by the right parties on time to the right decision-makers	R	P/A

1.2.2 Organizational Change Management (OCM)

The objectives of the activities in this work stream are to verify that BPCA understands the need for the specified change and its effects and that BPCA possesses the capabilities and motivation to change. More specifically, the activities will assist in:

- Accelerating BPCA's adoption of the changes required to fully use ERP
- Reducing the drop in performance that is typically associated with large-scale ERP implementations
- Helping to verify that BPCA is prepared to work with a new or changed set of processes that are enabled by the technology embedded in the ERP solution
- Transferring knowledge to BPCA, developing methods and content for user adoption and ongoing support of desired job performance

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 2. Organizational Change Management (OCM)

Roles and Responsibilities	PR	BPCA
Overall Communications and Change Leadership		
Create specific frameworks and communications to describe intended evolution of Enterprise Strategy and Operating Model to help transform BPCA into common, standard, and shared structures, processes, and resources	R	P/A
Create and implement communication strategies and plans and prepare for large-scale communication events	R	P/A
Ensure that consistent and effective messaging (i.e., style, breadth/depth, format, mechanism) is being used across all communications	R	P/A
Execute cascaded communications across the impacted business segments, regions, and locations	P	R/A
Create and manage change networks and institute change champions or super users to help drive the changes through the impacted business segment	P	R/A
Specific Process Change Readiness		
Assess and document the users' perspectives on the process changes that result from the move to ERP	R	P/A
Verify that appropriate client stakeholders have the information, capabilities, and tools they need to transition to new and changed business processes and to adopt the technology changes	R	P/A
Design specific roles and organization structures to achieve ERP adoption and expected benefits	R	P/A
Modify specific roles and organization structures to achieve ERP adoption and expected benefits	P	R/A
Assemble and maintain a business case that articulates and tracks process-specific benefits	R	P/A

Roles and Responsibilities	PR	BPCA
Determine and commit to quantified benefits for business case	P	R/A
Training & Knowledge Transfer		
Create a systematic process for business and IT knowledge transfer through the project life cycle in order to build skills and capabilities for delivering and supporting the implementation	R	P/A
Provide support to enable the project team to fully understand the current business processes and the existing legacy environment as well as the identified gaps and challenges in deploying to BPCA	P	R
Develop and deliver a role-based learning program and materials to equip the end-user community with training sessions and materials so it can work effectively in the ERP environment	R	P/A

1.2.3 Functional/Process Design, Configuration, and Testing

The objective of this work stream is to realize the required ERP solution so that the BPCA regions and businesses are fully supported across their end-to-end business processes. More specifically, the activities in this work stream will assist in:

- Ensuring consistent and full use of the configuration capabilities of the ERP solution
- Ensuring full understanding of identified gaps and challenges so that optimal decisions are made with respect to business process changes vs. package configuration changes vs. extensions
- Ensuring all upstream dependencies and down-stream impacts are factored into design and configuration decisions
- Delivering a fully integrated solution, inclusive of key integration points with identified non-ERP applications that will coexist with the ERP
- Involving operational users early and often throughout the project life cycle to ensure full understanding of the design and its impact on existing business processes
- Helping translate improved business processes and leveraging the ERP configuration into operational benefits
- Validating that technology, process, and people can work together as designed prior to go-live

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 3. Functional/Process Design, Configuration, and Testing

Roles and Responsibilities	PR	BPCA
Design		
Review and understand the existing requirements, gaps, and challenges already identified with respect to the business needs	R	P
Provide ongoing current state business process and legacy solution content, materials and BPCA subject matter personnel to ensure ownership of requirements, design, configuration, and testing priorities, decisions, deliverables, and results	-	R
Provide experienced ERP and process consultants who can expose best practices leadership and solutions to the functional gaps, challenges, and requirements required for ERP	R	A
Create design documentation that specifies package configuration choices and recommended options based on understood requirements	R	P/A
Develop white papers and stakeholder communication content, via high quality and clear documentation, for all applicable new designs, business rules, and key decisions that need to be understood and accepted	R	P/A
Develop functional specifications for all applicable new designs, interfaces, workflows, and extensions	R	P/A
Design role-based security for the user community	R	P/A
Develop and ensure the end-to-end process architecture across ERP and non-ERP solutions is fully accounted for within the final design	R	P/A
Configuration		
Define ERP implementation configuration and development standards and best practices that should be leveraged	R	P/A
Ensure baseline and detailed configuration is aligned with requirements, including setup hierarchies, master files, transaction processing, workflows, and interaction with interfaces and extensions	R	P/A
Testing		
Provide test plans, tools, scripts, cases that can be reused	R	P/A
Develop a comprehensive testing strategy, plan, and schedule for BPCA's regions and businesses, including integration, user acceptance, performance, and regression testing	R	P/A
Ensure clear documentation and execution of all defined test scenarios	R	P/A
Monitor testing and provide test results/status and action plans to fix defects	R	A
Execute integration, performance, and regression testing	R	P/A
Execute User Acceptance Testing (UAT)	P	R/A

1.2.4 Data Cleanse/Governance/Conversion

The objective of this work stream is to ensure accurate and reliable data is available in the ERP solution for each go-live at each location during the implementation. More specifically, the activities in this work stream will assist in:

- Ensuring consistency across the BPCA enterprise for data design, data standards, and data governance
- Enabling improvements in data quality so that reporting and resulting decision-making is more effective
- Reducing work-around, re-work, and reconciliation associated with poor data quality

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 4. Data Cleanse/Governance/Conversion

Roles and Responsibilities	PR	BPCA
General		
Ensure that data design documentation and knowledge of required data entity relationships are provided to BPCA	R	P
Ensure that data design related to new ERP functionality from the selected ERP solution is understood by BPCA	R	P
Provide experience, knowledge, and guidance for all local regulatory data requirements for all in-scope geographies and agencies	P	R
Data Cleanse		
Identify all sources for master file and transaction file data within the legacy environments	P	R/A
Ensure that legacy data requiring conversion is cleansed and rationalized prior to loading into the ERP solution	P	R/A
Data Governance		
Determine the business need and approach for historical data conversion and retention	P	R/A
Define data standards across the BPCA enterprise	P	R/A
Define master data maintenance processes and workflows in support of business requirements	R	P/A
Design new data governance processes and organizational model required for the ERP implementation	R	P/A
Identify and secure accountability for required data stewards within the BPCA regions and businesses	P	R/A
Ensure compliance with data standards and data governance processes	-	R/A
Implement new data standards and governance across the BPCA enterprise	P	R/A
Data Conversion		
Develop Data Conversion Strategy and Plan as per implementation schedule	R	P/A
Develop data mapping and related specifications for automated conversions	R	P/A
Develop procedures for all manual conversions/loads	R	P/A

Roles and Responsibilities	PR	BPCA
Design and execute mock migrations as per implementation schedule	R	P/A
Develop the automated conversion program and associated code	R	P/A
Execute all manual conversions/loads	P	R/A
Validate converted data throughout the testing processes, including mock migration	P	R/A

1.2.5 *Technical Design/Environment Management/Development*

The objectives of this work stream are to ensure that the technical solution supports the end-to-end functional design and that the overall technical development and production environments are reliable, stable, and meet performance requirements throughout the project life cycle. More specifically, the activities in this work stream will assist in:

- Ensuring compliance with, and leverage of, established BPCA technical and architecture standards
- Ensuring approved development objects are delivered to the testing cycles when needed
- Ensuring that the technical environment does not become a constraint or bottleneck at any time
- Delivering technical objects that support the end-to-end design and associated functional requirements

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support)) that aligns with your commitment, staffing, and pricing.

Table 5. Technical Design/Environment Management/Development

Roles and Responsibilities	PR	BPCA
General		
Ensure that technical design documentation and knowledge of existing environment that ERP will need to coexist with is provided to System Integrator	P	R
Ensure that solution architecture related to new ERP functionality is understood by BPCA	R	P
Provide technical environment, architecture, and development standards that BPCA subscribes to	-	R/A
Adhere to BPCA's established technical environment, architecture, and development standards	R	
Technical Design		
Management of technical design schedule and resources	R	P/A
Develop technical requirements documents to describe platform, security, architecture, controls, and integration requirements	R	P/A

Roles and Responsibilities	PR	BPCA
Develop all specifications for applicable development objects agreed to during Design	R	P/A
Ensure that solution architecture is well-documented and fully depicts and describes the end-to-end solution that aligns with the end-to-end business processes supporting the ERP target state environment	R	P/A
Provide experienced ERP technical consultants who can expose best practices leadership and solutions to the technical gaps, challenges, and requirements required for ERP	R	A
Environment Management		
Monitor Pre-Production Environments	R	P
Manage Environment Configuration and Build Control	R	P
Ensure System Performance and Reliability	R	P/A
Prepare system for production release	R	P/A
Procurement of all required hardware or software to support the implementation	-	R/A
Certify that the installation of the ERP system instance and environment, including database sizing and partitioning, are in compliance with the standards for the respective software release	P	R/A
Ensure that all activities comply with the ERP system standards for the respective software release	P	R/A
Development		
Management of development schedule and development resources	R	P/A
Coding and unit testing of all approved development objects	R	P/A
Performance testing	R	P/A

1.2.6 Reporting

There are three main objectives of this work stream:

1. To address root causes of any existing data quality and reporting process deficiencies so that prioritized process and data governance improvements can be delivered along with the new technology solution
2. To meet the reporting needs for the BPCA regions and businesses
3. Ensure that the first two objectives are delivered within a new ERP reporting architecture and solution that provides the foundation for a significantly improved user experience at executive, operational management, and end user levels

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 6. Reporting

Roles and Responsibilities	PR	BPCA
Improve Data Quality and Reporting Processes		
Assess data quality and governance processes and identify improvement opportunities	R	P/A
Develop data quality and governance strategy and plan	R	P/A
Implement cross-regional data quality standards, governance processes, and business accountability	P	R/A
Meet BPCA Reporting Needs		
Identify reporting needs	R	P/A
Create and approve inventory of reporting development objects to meet gaps	R	P/A
Ensure development approach is consistent with reporting architecture defined by Solution Architecture team	R	P/A
Build and unit test reports	R	P/A
Incorporate reporting into end-to-end integration and UAT test plans	R	P/A
Execute integration test	R	P/A
Execute UAT	P	R/A
Develop reporting training materials	R	P/A
Deliver reporting training	P	R/A
Establish ERP Reporting Solution		
Design reporting architecture for dashboards, analytics, and user queries	R	P/A
Establish standard toolsets for each reporting need	R	P/A
Implement reporting architecture in conjunction with BPCA reporting needs	R	P/A
Establish reporting user group for sustained and optimized usage and continuous improvement	P	R/A

1.2.7 Deployment and Immediate Post Go-Live Support

The objective of this work stream is to ensure an accelerated and high quality implementation followed by a focused and experienced support effort. The ultimate goal is to minimize business disruption and maximize user adoption. More specifically, the activities in this work stream will assist in:

- Providing an implementation schedule and associated staffing that can meet the demands of a phased, multi-site rollout in an efficient manner
- Ensuring site readiness prior to cutover
- Ensuring BPCA support organization readiness to provide expanded support of the ERP solution to internal and external stakeholders
- Ensuring that BPCA is self-sufficient in providing ongoing support

In your response, we will require you to confirm or make recommendations to the responsibilities outlined below. We also require you to provide a complete list of deliverables, by phase (i.e., Project Preparation, Design, Build/Test, Final Prep, and Go-Live/Support) that aligns with your commitment, staffing, and pricing.

Table 7. Deployment and Immediate Post Go-Live Support

Roles and Responsibilities	PR	BPCA
Support Transition		
Develop training materials	R	P/A
Deliver training	P	R/A
Support Transition		
Assess BPCA's current support model for its level of fit and, based on successfully implemented support models, determine changes to the existing structure and processes	R	P/A
Develop site-specific transition plans that encompass business process, operations, and organization alignment (Business and IT)	R	P/A
Establish backup, Disaster Recovery and other infrastructure related activities for ongoing support and maintenance of ERP and Non-ERP applications	P	R/A
Conduct knowledge transfer sessions and establish a Knowledge Management Repository to deal with issues, incidents, support and other problems	R	P/A
Provide help desk management personnel to approve the transition plan and to accept responsibility for ongoing applications maintenance services		R/A
Design/refine, develop, and implement the technical support infrastructure, including help desk procedures, telecommunications, and issue-tracking systems	P	R/A
Establish ongoing production support organization (IT and Business)	P	R/A
Deployment & Go-Live		
Assess implementation options and determine optimal implementation plan, sequencing, schedule, resource loading, accountability, etc.	R	P/A
Perform data migration from existing systems to new systems, by either electronic or manual methods, and perform selected integration and stress testing to validate that the solution is ready for production	R	P/A
Deliver site-specific system and user documentation	R	P/A
Conduct pre-installation site surveys to assess site readiness against a set of best practices checklist criteria	R	P/A
Review and approve readiness of cutover deliverables	P	R/A
Coordinate implementation and support activities with BPCA and site management teams	R	P
Perform the Go-Live cutover to the production system	R	P/A

Roles and Responsibilities	PR	BPCA
Provide on-site support for an appropriate period of time to ensure stabilization (min of 3 months per implementation phase)	R	P/A
Post Go-Live Operations		
Conduct post-implementation acceptance tests	P	R/A
Conduct Lessons Learned activities with each deployment	R	P
Identify and implement system fixes to correct system level performance problems (warranty period). These could be related to configuration, coding, data, training, root causes, etc. Update all documents associated with these fixes, as applicable.	R	P/A
Provide personnel to manage Warranty Service requests and related tracking through resolution and sign-off	R	P/A
Approve all Warranty Service fixes with formal sign-off	P	A
Perform System Monitoring activities to support post go-live operations	P	R
Continuous Improvement		
Establish an ongoing assessment and evaluation process to determine if the project goals were achieved and to identify additional areas for improvement	P	R/A

1.3 Team Structure and Key Personnel

All proposed key personnel must be approved by BPCA and named as “key personnel” in the contract. System Integration key personnel shall include, but not be limited to, the positions described below.

Senior Executive

A Senior Executive shall have P&L responsibility for the proposed services. The Senior Executive will be BPCA’s primary point of contact throughout the project. Among other qualifications and responsibilities, the Senior Executive shall: (a) be knowledgeable about the services of the Proposer and its subcontractors’ products and services; (b) be experienced in operating similar systems for clients similar to BPCA; and (c) provide direct line of sight authority to secure sustained commitments from Proposer throughout the implementation.

Program/Project Manager

The Program/Project Manager will serve as the day-to-day, on-site System Integrator lead and work directly with his/her counterpart at BPCA. This role is widely held as the most critical role for a Proposer to successfully support an ERP implementation. The Program/Project Manager must be a seasoned veteran with a successful track record in multiple full life cycle ERP implementations in the public sector.

Functional/Process Leads

The Proposer will identify persons to serve as leaders of each of the functional/process teams. These leads will provide project management capabilities for their functional/process domain and will be paired with BPCA leads for each domain. These individuals must possess deep knowledge of the software modules being implemented as well as process, configuration and integration best practices. These leads will be able to proactively guide BPCA’s team through cross-functional

considerations and change management considerations so that design and configuration decisions are fully exposed to upstream and downstream impacts as well as all affected stakeholders.

Organization Change Management Lead

The System Integrator will designate a Change Management lead that has successfully held this role on other large-scale ERP implementations for other public sector clients. This lead will be seasoned in all methodologies and leading practices to help drive effective communications; organization and process change understanding, advocacy, and acceptance; and effective/efficient training.

Technical Lead

The System Integrator will designate a Technical Lead who has successfully held this role on other large-scale ERP implementations for other public sector clients. The Technical Lead must be a seasoned project manager who can provide direction and ensure knowledge transfer for all development activities and resources, tools and utilities, environment management, performance testing, and technical cutover activities and support.

Solution Architect

The System Integrator, in conjunction with the Software Vendor, will designate a Solution Architect Lead who has successfully held this role on other large-scale ERP implementations for other public sector clients. The Solution Architect must be seasoned in helping define, design, build, test, and deploy a technical architecture that supports the necessary process architecture defined by the end-to-end solution and business processes. The Solution Architect will be critical to ensuring that integration, services, data, reporting, mobile, portal, and security architectures are robust, flexible, interoperable, and meet system performance requirements. The Solution Architect must also help ensure that the Solution can be scalable and supportable at a low total cost of ownership.

1.3.1 Key Staffing Assumptions

Retention

The assigned staff must be able to work across the required geographies throughout the engagement with minimal turnover. Any unavoidable turnover must be communicated to BPCA with no less than 30 days' prior notice and an immediate knowledge transfer plan must be put into action that requires an overlap period of the outgoing and incoming resources working together on-site. During this overlap period, BPCA will pay only for the time and expenses for one resource.

Full-Time Project Resources

The System Integrator will ensure that all Key Personnel are staffed full-time to fulfill System Integrator's responsibilities under the contract. Any periods of part-time staffing should be clearly explained in the Proposal.