

**STATEMENT OF WORK**  
**FOR**  
**DELIVERABLES-BASED INFORMATION**  
**TECHNOLOGY SERVICES**

**#CIO-22-144**

**Workday Training Engagement**  
***The Texas A&M University System***

Per the Department of Information Resources Deliverables-Based  
Information Technology Services (DBITS) Contract.

*February 8, 2022*

# A&M System Workday Training Engagement

## 1. Introduction

The purpose of this document is to define the requested services and deliverables the Texas A&M University System (A&M System) is seeking in the engagement, give the reader insight into the A&M System's Workday Training initiative, and request proposals.

## 2. Background

The A&M System will initiate a project to create Workday training curriculum for end users within each campus and agency (collectively referred to as "Members") of the A&M System. In 2017 the A&M System went live with Workday and has depended primarily on virtual webinars to train HR, Payroll and Benefits staff who have security roles and support employees in the Workday application. The Workday Services department within the Office of Informational Technology is responsible for developing and maintaining all training materials for the A&M System and seeks to create a digital library of eLearning courses and video to provide foundational Workday training for new and existing users. Existing eLearning's are primarily focused on employees and managers only.

## 3. Scope of Work (SOW)

The A&M System is seeking a provider for project management and digital content developers on this project.

This project will be a three-phase process:

- Phase 1: Planning the scope and timeline for project delivery as well as member engagement
- Phase 2: Content development
- Phase 3: Defined processes for rolling out materials, communication and training on navigating and effectively utilizing training materials

Anticipated services will include at a minimum:

- Project management leadership under supervision of the Associate Director for Education and Training within Workday Services. Development of project planning materials, planning and execution of meetings with relevant stakeholders, curriculum planning and guidance for content developers
- Content development under guidance of Project Manager in the areas of Core HR, staffing, compensation, payroll, benefits, time, absence, performance, recruiting, security and advanced Workday navigation.
- Guidance on appropriate communication and marketing of new curriculum and training materials necessary
- Providing accessible materials that meet WCAG 2.0 standards

## 4. Deliverables

Expected deliverables shall include at a minimum:

- A minimum of one eLearning in each core area published using Storyline that includes assessment and feedback for the learner
- Advanced navigation course for security roles published in Storyline
- 20 to 25 context based scenario videos on initiating major business processes such as Change Job, Hire and Termination produced in mp4 that includes an srt file to be utilized for closed captioning

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- A curriculum guidebook that explains materials available and the purpose of each item provided to the learner

### **5. Reports and Meetings**

- The Vendor is required to provide the A&M System project manager with monthly written progress reports of this project as specified in the deliverables.
- The monthly report shall cover all work performed and completed during the month for which the progress report is provided and shall present the work to be performed during the subsequent month.
- The Vendor will be responsible for participating in weekly status meetings with the A&M System project manager and/or the project leadership team. The meetings will be held at a time and place designated by the A&M System project manager. The meetings can be in person or over the phone as agreed by Vendor and the A&M System project manager.

### **6. Period of Performance**

Performance under an agreement pursuant to this Statement of Work shall commence upon execution of an agreement and will extend for two (2) years with an anticipated start date of May 1, 2022. This agreement may be extended for up to two additional one (1) year terms if requested by the A&M System and agreed to by both parties.

### **7. Invoices**

Invoicing will occur based on a deliverables completion and acceptance schedule agreed upon between the A&M System and the Vendor.

It is the policy of the A&M System and the state of Texas to make payment on a properly prepared and submitted invoice within thirty (30) days of the latter of any final acceptance of performance or the receipt of a properly submitted invoice, in conformance with the Texas Prompt Payment law. Generally, payment will be made on the 30<sup>th</sup> day unless a discount or other terms have been arranged within the agreement.

### **8. Customer/Vendor-Furnished Equipment and Work Space**

The Vendor should provide all necessary equipment for each Vendor staff member. A&M System will provide workspace for Vendor's staff when the Vendor is on-site as well as WiFi access to the internet. Onsite work will be event targeted. The project manager will be expected to perform some onsite work with primary focus on beginning engagements and facilitating milestones. Additional consultants may perform limited on site work that is also event targeted and only as needed with a primary focus on beginning the engagement.

### **9. Additional Customer Terms and Conditions**

Refer to the terms and conditions in Exhibit A.

### **10. Proposal**

The Respondents must demonstrate knowledge and expertise for the work to be performed through prior similar experience, staff credentials, or other means. This shall be evident through the information provided below or through interviews held with selected finalists.

A. Respondents shall provide a staffing plan specific to the SOW including:

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- Vendor project team organization chart
  - Resumes of key personnel that will be assigned to the project
  - Include an estimated amount of time each key personnel will be devoted to the project and in what role or function
- B. Respondents shall provide at least two (2) references willing to provide samples of completed eLearnings, preferably one from an institution of higher education with a similar project scope. Each reference shall include at least the following:
- Company name
  - Contact person name and title
  - Contact phone number and email address
  - General description of the completed scope and services provided

### 11. Pricing

Respondents shall provide a fee and payment schedule to include all applicable rates with estimated hours. The A&M System estimates that the total not-to-exceed cost for the two-year project will be in the range of \$200,000 – \$400,000.

### 12. HUB Subcontracting Plan

It is the policy of the state of Texas and the A&M System to encourage the use of Historically Underutilized Businesses (HUBs) in our prime contracts, subcontractors, and purchasing transactions. The goal of the HUB program is to promote equal access and equal opportunity in A&M System contracting and purchasing.

Based on the scope of this SOW, Respondents must determine if they can perform the entire scope with their own resources or if it will be necessary to subcontract any portion of the scope. Subcontracting opportunities are defined as those opportunities contracted with a vendor to provide services, supply commodities, or contribute toward completing work for a governmental entity.

Subcontracting opportunities are possible for this SOW and therefore a HUB Subcontracting Plan (HSP) is **required**. Failure to submit a comprehensive, acceptable HSP will be considered a material failure to comply with the requirements of the SOW and will result in rejection of the submittal. The HSP shall be submitted **with** the SOW response by the date and time specified. The applicable **HUB goal** to utilize for this RFP is **11%** for “all other services” and every effort shall be made to achieve this goal at a minimum. Respondents shall complete the A&M System HSP form (attached or [CLICK HERE](#)) and submit it with the RFP response.

If there are pre-existing agreements in place with companies who will be hired as subcontractors, the Respondent will show those vendors as subcontractors on the HSP and provide an explanation as to why solicitations were not done, e.g. contractual requirements. If no pre-existing agreements with companies who will be hired as subcontractors exist, then the Respondent will be expected to make a good faith effort according to the HSP instructions. Don't forget to include any backup documentation and sign the HSP form.

**If the Respondent is completing as self-performing**, a statement which attests that the respondent shall perform the subcontracting opportunities identified by the agency, with its own employees and resources is required. The sections in the HSP form to be completed for self-performing are Section 1, 2a (check “No”), 3 with your statement included in the open text field, and 4.

For information regarding the HUB Subcontracting Plan requirements, please contact Jeff Zimmermann

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from the A&M System's HUB Program at (979) 458-6410 or [soprocurement@tamus.edu](mailto:soprocurement@tamus.edu) for assistance in determining available HUB subcontractors and proper completion of the HSP. **Respondents have the opportunity to submit a draft of the HSP prior to submittal of their response to the SOW for review by Mr. Zimmermann.**

### 13. Response Submission Requirements

- Submittal Instructions

All proposals must be received by the A&M System, no later than **2:00 p.m. CST, March 1, 2022** electronically via email to [soprocurement@tamus.edu](mailto:soprocurement@tamus.edu) with the subject line of **"DBITS – Workday Training Engagement"**. The sent time indicated within the A&M System email server shall be used for the receipt and acceptance of the response. Late proposals will not be considered under any circumstances.

Submittal File Format: Submission shall be saved as three (3) separate files according to the items listed below and named as such; **I) "company name – Proposal", II) "company name – Pricing" and III) "company name – HSP"**.

- Proposal Components

The following documents and all requirements from noted sections are to be submittal as part of your proposal response. Failure to include these documents may be basis for response disqualification.

- I. Proposal (Section 10)
- II. Pricing (Section 11)
- III. HUB Subcontracting Plan (HSP) (Section 12)

- Questions

For questions regarding this request for proposals please submit them in writing to [soprocurement@tamus.edu](mailto:soprocurement@tamus.edu) with the subject line of **"DBITS – Workday Training Engagement"**. Answers to all questions submitted will be shared with all potential respondents.

### 14. Selection Process

A&M System will base its choice on demonstrated competence, qualifications, ability to meet the stated specifications and requirements, any other factors as deemed relevant by the A&M System, and on the reasonableness of the proposed price for the purchase; and if other considerations are equal, give preference to a RESPONDENT whose principal place of business is in the state or who will manage the agreement wholly from an office in the state. The A&M System at its sole discretion, may conduct interviews of selected Respondents as part of the evaluation process.

A&M System may perform reference checks and seek further information, as needed from all RESPONDENTS whose proposals A&M System, at its discretion, considers viable, based on the initial evaluation and scoring. The RESPONDENT's response to this proposal request officially authorizes A&M System to contact these organizations to discuss the services and other considerations which the RESPONDENT has provided to such organizations and authorizes the organizations to provide such information to A&M System and RESPONDENT shall and hereby does release and hold harmless A&M System, the state of Texas, and the organization of any and all liability whatsoever, in connection with providing and receiving all such information. Any negative responses received from reference checks may be grounds for disqualification of the proposal.

Submission of proposals indicates RESPONDENT's acceptance of the evaluation techniques and the recognition that subjective judgments must be made by A&M System during the evaluation process.