Purpose

This document provides some helpful tips the Florida PALM Project has used when going through the Staff Augmentation Procurement Process. Procurement guidance and processes are the responsibility of DMS and your agency. These best practices may be helpful to you when procuring the support services to help your agency transition to the implementation of Florida PALM.

Planning

Identify the Project Needs

It's essential to begin by clearly identifying your project needs. Consider the following areas when assessing your needs:

- Business
- Technical
- Change Management
- Project Management
- Readiness Workplan

Take the time to review the plan. This will play a major role in identifying the needs and setting the foundation for the project.

Identify Source of Funds and Budget

Assessing the available funds and their restrictions or guidelines. Whether you're utilizing Administered or direct appropriation funds, it's crucial to align expenditures with your Florida PALM transition needs, while maintaining documentation of the benefits to your Florida PALM Readiness. Consider establishing a budget that accounts for both expected and unforeseen expenses.

Identify the Method of Payment

Fixed hourly rate-based payment is the standard per the State Term Contract.

Identify Contract Vehicle

The State Term Contract (STC) 80101507-23-STC-ITSA, Information Technology Staff Augmentation Services most commonly.

FACTS presents unique opportunities to search for executed contracts, grants and purchase order details for all agencies or all commodity groups. This approach will help gather information based on other agencies' experiences.

Identify Roles and Responsibilities

In any project, clarifying roles and responsibilities is essential for ensuring accountability and smooth coordination. Consider establishing a team panel, made up of an odd number of members, including but not limited to:

- Contract Manager
- Contract Administrator
- Project Manager
- Content Experts – Florida PALM Readiness / CCN members; business system owners / technical support

Include key stakeholders for areas related to change and project management.

Once the team panel is established, clearly define the roles and responsibilities of each member. This ensures everyone understands their contributions and commitments to the project. Regular communication and coordination among team members will help ensure successful project outcomes.

Development

Develop Timeline of Project

Creating a comprehensive timeline is crucial for ensuring the smooth execution of your project. Key steps to consider when developing timelines:

- *Services Timeline:* Identify the key services or deliverables required for the project. Estimate the time needed to complete each service. Consider dependencies between services and any external factors that may impact timelines.
- *Procurement Timeline:* Allocate time for each step in the procurement process, considering legal requirements and organizational procedures. Communicate the procurement timeline to team panel.
- *Work Specific Timeline:* Develop timelines for specific tasks or workstreams within the project. Break down larger activities into smaller, manageable tasks with clear deadlines. Assign responsibilities for each task and communicate expectations to team members. Regularly review and update the work-specific timeline to track progress and address any delays or obstacles.

Develop the Statement of Work

When developing a Statement of Work (SOW), it's essential to provide clear guidance and expectations for vendors. Clearly communicate roles and responsibilities to both internal and external team members to foster collaboration and accountability. For example, clearly outline the Vendor's Responsibilities as shown in the examples below:

Vendor Responsibilities Example (this is just an example, and each agency should define their specific needs):

The Vendor shall provide one (1) or more Enterprise Resource Planning (ERP) Resource(s) to assist in the support of project activities related to ERP. The ERP Resource(s) shall be available to perform services on-site during the normal business hours of 8:00 AM to 5:00 PM ET, Monday through Friday (flexible schedules and remote work locations may be considered but must be approved by the Department's Project Director). The ERP Resource(s) shall work with all project stakeholders, including but not limited to, the Project Director, Deputy Project Director, Project Architects, and project team members, as requested. Additionally, the ERP Resources may be requested to work with the SSI Vendor and other state policy groups to solve complex issues and *identify improvement opportunities. All tasks to be performed by the ERP Resource(s) will be directed and communicated by the Department's Contract Manager or delegate. The ERP Resource(s) shall perform the following tasks throughout the term of the PO:*

- *Take day-to-day direction from the Department's Contract Manager or delegate and work with project team members to support all activities related to ERP and PeopleSoft.*
- *Use and share lessons learned, and best practices associated with the area of ERP that may promote efficiency and help to identify and mitigate potential risks.*
- *Serve as an ERP and/or PeopleSoft subject matter expert, which includes:*
  - *Providing Solution recommendations;*
- *Evaluating designs and configurations for alternatives, including but not limited to:*
  - *Financials and Payroll implementations*
  - *Data warehouse/business intelligence implementations*
  - *Data cleansing and conversion*
  - *Data integration*
  - *System, integration, and end-user testing*
  - *Cutover planning and execution*
- *Complete knowledge transfer/training activities to the identified parties, as directed by the Department's Contract Manager or delegate.*
- *Provide overall project support, which includes:*
  - *Providing updates to project status reporting;*
  - *Coordinating with the Directors and Architects to develop/update templates for project use;*
  - *Facilitating meetings, promoting teamwork, and providing training as requested;*
  - *Tracking, mitigating, and escalating risks and issues;*
  - *Maintaining tools for the project team's use;*
  - *Researching, collecting, evaluating, and refining data/tools necessary to meet project goals.*
  - *Keeping the project team up to date on the latest PUMS, patches and other releases by PeopleSoft that may impact the currently implemented or to be implemented parts of the Solution.*
- *Perform other duties as assigned by the Department's Contract Manager, and/or their delegate.*
- *Complete transition services, including facilitating lessons-learned meetings; creating a lessons-learned document related to ERP support services; and providing all the documents, software, software licenses, and other project artifacts to the project team as it relates to the work performed under the PO.*
- *Assist the project team to trouble shoot and resolve issues in the production system as requested.*
- *Serve as the emergency back-up technical team to keep the production system stabilized in case the SSI Vendor's contract is Terminated or Expires (emergency back-up activation event) prior to execution of a new contract. This service would be as activated and directed by the Department in case of such an event.*

Include qualification language or requirements and detail your expectations regarding how the vendor will engage and perform their work, including meeting participation, onsite vs. remote work, and hours per week. Below are examples of Qualifications Florida PALM has used for Staff Augmentation, ERP Resources:

Preferred Experience Example (this is just an example, and each agency should define their specific needs):

- *Experience working with the State or with other state governments similar in size in terms of annual budget and full-time equivalent (FTE) employee count.*
- *Bachelor's Degree in Computer Science, Information Systems, Information Technologies, Business Management, Accounting, or related field.*
- *Experience implementing*
  - *data warehouse/business intelligence solutions.*
  - *Financials and Payroll implementations*
  - *Data cleansing and conversion*
  - *Data integration*
  - *System, integration and end-user testing*
  - *Cutover planning and execution*
- *Knowledge of PeopleTools 8.59+ and fluid page development.*

Develop Interview Questions

Ensure that the questions clearly reflect the expectations and requirements of the role. Make questions specific and tailored to the skills and experience needed for the position. Consider including questions that probe candidates' problem-solving abilities, communication skills, and fit with your project team culture.

Evaluate and Award

Evaluate the Responses from Vendors

Utilize the team panel to review and evaluate the responses from the vendors. These reviewers bring perspectives and expertise to the evaluation process, ensuring thorough consideration of each vendor's proposal.

During the evaluation process, to ensure consistency, responses from vendors should be presented in a standardized format. When the responses are received:

- Compile all responses into a spreadsheet.
- Include relevant details such as pricing, proposed solutions, timelines, qualifications, and any additional information provided by vendors.
- Use clear headings and columns to categorize and compare responses, making it easy to identify key differences and similarities.
- Provide a summary or overview highlighting key findings, strengths, weaknesses, and any outstanding questions or concerns.

You may find it helpful to develop a Skills Matrix as a requirement document for vendors submitting their candidate details. This document provides a standard format for providing the response to each candidate's required (or preferred) experience and knowledge, skills, and abilities (KSAs), including the years of experience, role(s) served, and details describing the experience. By having the vendor include these specific details in the Skills Matrix, the submissions can be used to evaluate and compare vendors more efficiently.

Interview Phase

The Contract Manager leads the interview, freeing up the others on the team panel to concentrate on the interviewee's responses. This ensures that the interview process runs smoothly and effectively, ultimately helping to identify the most qualified candidates for the position.

Since many responding vendors are located outside of Tallahassee, you can make the decision to conduct interviews in person or virtually (e.g., Teams). If conducting virtually, contemplate requiring the use of webcams for more personal interactions. For top candidates, it is also beneficial to schedule a second interview to get a better sense for the candidate and to expand the questions and opportunity for interaction.

Selection, Execution, and Onboarding

Selection of Resources

It's key to initiate the selection process promptly to ensure a smooth transition and timely project kickoff. For this type of procurement your resources may come from one or many vendors. It is suggested to hire the best resources, not to simply hire all resources from a single vendor. Once you have selected the resources, you will need to initiate the onboarding process through the vendor(s) for the selected resources. Here are some considerations for managing the process effectively:

- *Send Next Steps Quickly:* Once resources have been selected, send out information (e.g., background screening) promptly to the vendor(s) to initiate the necessary steps for integration into the project. This helps maintain momentum and demonstrates your commitment to a timely and efficient process.
- *Include Estimated Timeline:* Along with the next steps, provide an estimated timeline for the purchase requisition process. This helps set expectations for both parties and ensures alignment on key milestones and deadlines.

Regularly communicate with the vendor(s) to provide updates on the onboarding process and address any questions or concerns they may have. Keeping lines of communication open fosters trust and collaboration.

Create the Purchase Requisition

Understanding the approval flow and typical turnaround times can help expedite the purchasing process and avoid delays. Here's how to optimize the purchase requisition approval process:

- Watch the Approval Flow: Monitor the approval flow of purchase requisitions closely to identify any bottlenecks or delays in the approval process. Reach out to the appropriate contacts or stakeholders to expedite approvals and keep the process moving forward smoothly.
- Communicate with the Vendor: Keep the vendor informed about the estimated timeline for purchase requisition approval and subsequent order placement. Transparency regarding the purchasing process helps manage expectations and ensures alignment between the vendor and your agency.

Onboarding

Once the Purchase Requestion is fully approved, schedule an onboarding (e.g., orientation) meeting prior to the initiation of true work activities. This meeting creates transparency about the time required for various onboarding activities, such as paperwork completion, required training sessions, and system access setup.

Monitoring, Timesheets, and Invoicing

Monitor Performance

Scheduling regular meetings with the vendor or project team to monitor performance, discuss progress, and address any issues or concerns. These meetings provide a structured forum for reviewing project status, identifying potential risks, and adjusting approach, as needed. Consider developing a Support Service Process. Here is an example of how Florida PALM utilizes a Support Services Quality process which is focused on the overall interactions and performance of our staff augmentation vendors (called Support Services Contractors) during a specific period.

This is just an example. On a monthly basis, the Contract Manager collects feedback on the performance and interactions of the Support Services Contractors across the five measures listed below. The Contract Manager meets with the Support Services Contractor to review the assessment for each measure.

1. *Communication*
   - *Does the Support Services Contractor demonstrate clear communication skills and keep the project up to date with key activities?*
   - *Does the Support Service Contractor demonstrate acceptable:*
     - *Written communication skills?*
     - *Verbal communication skills?*
     - *Listening communication skills?*
2. *Availability*
   - *Is the Support Services Contractor available for meetings and to answer questions as agreed to and expected?*
   - *Does the Support Services Contractor provide continuity of resources and knowledge throughout the engagement?*
3. *Recommendations which have a positive value:*
   - *Does the Support Services Contractor's recommendations and deliverable content provide a positive value to the project?*
   - *Does the Support Services Contractor provide solutions which are practical within the constraints of the State and project environment?*
4. *Timeliness:*
   - *Does the Support Services Contractor complete tasks/deliverables by the agreed completion dates?*
5. *Professionalism:*
   - *Does the Support Services Contractor respect other project team members and their roles, adapt to the Florida PALM environment, and demonstrate a positive and cooperative attitude?*

Timesheets and Invoicing

Along with the standard Contract Manager duties of overseeing the submission of timesheets by the vendor contractors, consider adding a member from the team panel to provide quality control when reviewing the invoices submitted. This will ensure accuracy and completeness verifying services rendered. You may find it helpful to actively manage the vendor relationship, when handing all communication, timesheets and invoicing efficiently, the Contract Manager helps to ensure smooth operations and successful project outcomes.