

Florida Polytechnic University
University Procurement
4700 Research Way Lakeland, FL 33805
REQUEST FOR PROPOSAL
RFP 24-001
WORKDAY CONSULTANT

REQUEST DATE: April 19, 2023	REQUESTING DEPARTMENT: Finance & Administration	
SERVICE: Consulting SCOPE: Day to day support for Finance & Administration in Workday OTHER: See Section 1.		
DUE DATE: May 10, 2023	TIME: 2:00 PM (ET)	EMAIL: procurement@floridapoly.edu

Please Note:

Proposals should include background information, references and associated costs.
 Proposals should be emailed to the above email address on or before 05/10/2023; 2:00 PM (ET).
 Questions can be directed to Andrea Cashell at the above email address on or before April 26, 2023; 4:00 PM (ET).
 The University reserves the right to award multiple contracts.

Equal Employment Opportunity-All parties must be in compliance with executive order 11246 of September 24, 1965 as amended by executive order 11375 of October 13, 1967.

The University's General Terms and Conditions and Instructions to Bidders, viewable at [Florida Poly PO Terms and Conditions](#) and, apply to this Request for Proposal (RFP).

STATEMENT OF NON- COLLUSION AND NON-CONFLICT OF INTEREST

I hereby swear (or affirm) under penalty for false swearing :

1. That attached Submitted Proposal has been without collusion with, and without any agreement, understanding or planned common course of action with, any other vendor of materials, supplies, equipment or services described in the Submitted Proposal designed to limit independent competition.
2. That the proposer is legally entitled to enter into the contract with Florida Polytechnic University Board of Trustees, and is not in violation of any prohibited conflict of interest.
3. That I have fully informed myself regarding the accuracy of the statements made above.

SIGNED BY: _____ Telephone: _____ Fax: _____

PRINT NAME: _____

FIRM: _____

ADDRESS: _____

SPECIFICATIONS:

1. Scope of Services:

Florida Polytechnic University (hereinafter referred to as the University/Florida Poly) is seeking proposals from financially sound, qualified firms to provide Day to day support for Finance & Administration in Workday for the following, but not limited to, items:

Core Financials and all underlying general ledger accounting activity

Payroll

Grant accounting

Fixed Assets

Budgets (Adaptive Planning)

Project accounting

Procurement

Human Resources

2. Method of Award:

Proposals will be evaluated based on the below criteria:

Offeror Qualifications

Experience in HCM/Finance - Attachment B - Key Personnel

References and Past Experience - Attachment C

Financial Proposal - Attachment D

Optional/Value Add Services - Please include detailed description along with any associated fees.

3. Contract Period:

The Contract resulting from this RFP and the Successful Offeror's Proposal shall be in the form of a Personal Service Contract (PSC) and will begin on the date of contract execution and continues through June 30, 2023, with an option to renew for five (5) additional one (1) year periods. Annual renewal will be contingent upon the University's needs and satisfaction with the services performed and the overall performance of the Contractor.

The University reserves the right to renegotiate any term and/or condition as may be necessary to meet requirements for any renewal period. The Successful Offeror will be advised of any proposed revisions prior to the renewal period.

4. References and Past Experience:

Offeror shall supply the names, addresses, telephone numbers and complete contact information of at least three (3) references for which work has been accomplished within the last three (3) years. Include a complete description of the types of services provided. References should be relevant with regard to the scope of services outlined in this RFP. By submitting a Proposal, the Offeror grants permission to the University to contact references.

5. Proposal Submission and Deadline

Offeror must submit proposal to procurement@floridapoly.edu on or before 2:00 PM(ET); May 10, 2023.

Note: Proposals received after the closing date and time will not be considered.

There will be no public opening of Proposals. All Proposals will be kept confidential until such time that a contract is awarded or 30 days after proposals have been received. After a contract is awarded, all Proposals will become public record, as described.

6. Insurance

Contractor shall procure and maintain, at its expense, the following minimum insurance coverage insuring all services, work activities, and contractual obligations undertaken in this Contract. These insurance policies must be with insurers acceptable to Florida Polytechnic University Board of Trustees.

Workers' Compensation \$1,000,000

General Liability \$1,000,000

Excess Liability \$1,000,000

Business Automobile Liability \$1,000,000 (each occurrence, any auto owned, non-owned, hired, or borrowed)

7. Transmittal Letter

The Transmittal Letter accompanying the RFP shall be in the form of a standard business letter and shall be signed by an individual authorized to legally bind the Offeror. The transmittal letter shall include:

1) A statement referencing all Addenda to this RFP issued by the University and received by the Offeror.

If no Addenda have been received, a statement to that effect should be included.

2) A statement that the Offeror's Proposal shall remain valid six (6) months after the due date.

3) A statement that the Offeror will accept financial responsibility for all travel expenses incurred for oral presentations (if required) and candidate interviews (if required).

4) A statement that summarizes any deviations or exceptions to the RFP requirements and/or the sample Personal Services Contract attached (Attachment A), including justification for the deviation or exception.

ATTACHMENT A- SAMPLE PERSONAL SERVICES CONTRACT
FLORIDA POLYTECHNIC UNIVERSITY
SAMPLE PERSONAL/PROFESSIONAL SERVICES CONTRACT

This CONTRACT is made and entered into this XXX by and between The Florida Polytechnic University Board of Trustees (“UNIVERSITY”) 4700 Research Way, Lakeland, Florida 33805, and XXX with a principal place of business at XXX (“Contractor”).

RECITALS

Contractor has proposed to provide XXX services for UNIVERSITY.

1. **Recitals.** The above recitals are true and correct and are incorporated herein by this reference.
2. **Services.** Contractor agrees to perform and provide to UNIVERSITY the following services (“Services”):
3. Contractor key personnel for the purposes of this Agreement is XXX. Contractor may reassign or substitute key personnel upon written consent of University; such consent will not be unreasonably withheld.
4. **Term.** this agreement begins on the date of contract execution and continues through XXX, with an option to renew for XXX additional XXX year periods.
5. **Fee for Services.** As full compensation, inclusive of all expenses, for the Services to be provided by Contractor in this Agreement, University agrees to pay Contractor XXX (“Fee”).
6. **Payment.** Contractor will submit to the University invoices for the Fee for Services rendered, in arrears. University will designate a representative to serve as University’s point of contact for the Contractor submission of invoices and questions concerning payment status. Contractor must submit invoices for compensation for services or expenses in sufficient detail for a pre- and post-audit, and in accordance with Payment Schedule that is labeled as **Exhibit II**.
 1. Contractor is responsible for any taxes due under this Agreement.
 2. University will make payment within 30 days of receipt of a proper invoice.
 3. If University does not issue payment within 30 days of receipt of a proper invoice, University will pay to Contractor an interest penalty at the rate established pursuant to section 55.03(1), Florida Statutes if the interest exceeds \$1.00.
 4. A Vendor Ombudsman, whose duties include acting as an advocate for vendors who may be experiencing problems in obtaining timely payment(s), may be contacted at 863-874-8448.
 5. University may make payment to Contractor via the University’s EFT/ACH payment process. Vendor must provide the necessary information to University upon request.

7. Public Records, Contract for Services: Compliance with section 119.0701, Florida Statutes.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

Florida Polytechnic University

Attention: General Counsel

4700 Research Way

Lakeland, FL 33805

ogc@floridapoly.edu

(863) 874-8412

To the extent that Contractor meets the definition of "contractor" under section 119.0701, Florida Statutes, in addition to other contract requirements provided by law, Contractor must comply with public records laws, including the following provisions of section 119.0701, requiring Contractor to:

1. Keep and maintain public records required by University to perform the service.
2. Upon request from the University's custodian of public records, provide the University with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in chapter 119, Florida Statutes, or as otherwise provided by law.
3. Ensure that confidential information or records that are exempt from public records disclosure are not disclosed except as authorized by law for the duration of this agreement, renewals, and following completion of the contract if Contractor does not transfer the records to University.
4. Upon completion of this Agreement, transfer, at no cost, to University all public records in possession of Contractor or keep and maintain public records required by University to perform the service.
 - 1) If Contractor transfers all public records to University upon completion of the contract, Contractor must destroy any duplicate confidential information or records that are exempt from public records disclosure.
 - 2) If Contractor keeps and maintains public records upon completion of this Agreement, Contractor must meet all applicable requirements for retaining public records.



- 3) All records stored electronically must be provided to University, upon request from the University's custodian of public records, in a format that is compatible with the information technology systems of the University.
5. Third parties requesting to inspect or copy public records relating to this agreement must be made directly to University. If University does not possess the requested records, University will notify Contractor of the request, and Contractor must provide the records to the public agency or allow the records to be inspected or copied within a reasonable time.
6. The University may inspect the:
 - 1) Financial records, papers, and documents of the Contractor that are directly related to the performance of the contract or the expenditure of state funds.
 - 2) Contractor's programmatic records, papers, and documents which the University determines are necessary to monitor the performance of this agreement or to ensure that the terms of this agreement are being met.
 - 3) The Contractor must provide such records, papers, and documents requested by the University within 10 business days after the request is made.
 - a) The right of access in this provision is not limited to the required retention period but lasts as long as the records are retained.
7. The terms of section 6 are material terms of this agreement, and failure to comply may result in termination and/or civil penalties.

8. Indemnification.

1. Contractor agrees to release, indemnify, defend, and hold harmless: (1) Florida Polytechnic University or The University Board of Trustees; (2) The Florida Board of Governors; (3) The State of Florida and their respective trustees, officers, employees and agents from:
 - a) any and all liability, fines, royalties, fees, taxes, suits, claims, demands and actions, costs, attorney's fees and expenses of any kind or nature whatsoever ("Losses") for any loss of life, personal, bodily or economic injury or damage or loss to property arising out of the negligent or intentional acts, errors or omissions of Contractor, its officers, agents, employees and contractors; and from and against any orders, judgments or decrees which may be entered pursuant thereto.
2. Nothing in this agreement may be construed as an indemnification of the Contractor by the University or as a waiver of sovereign immunity beyond that provided in section 768.28, Florida Statutes.
3. This provision will survive the termination of this agreement.
4. Due to its sovereign immunity, University will not indemnify Contractor.

9. Copyright and Intellectual Property.

1. If Contractor uses copyrighted materials or documents not owned by University (“Copyrighted Materials”) in Contractor’s performance of the agreement, Contractor represents and warrants that it owns, or is licensed to use and to authorize others to use, the Copyrighted Materials.
2. Contractor will, at its expense, defend any suit brought against University and will indemnify University against an award of damages and costs, including attorney’s fees, made against University by a settlement or final judgment that is based on a claim that University’s use of the Copyrighted Materials infringes a trademark or copyright of a third party.
3. This provision will survive the termination of this agreement.
4. Any reports or deliverables provided to the University pursuant to this agreement are considered as works for hire, and the University may use such reports or deliverables for any purposes.

10. Termination.

1. Termination at Will. This Agreement may be terminated by University by providing written notice to Contractor of such intent to terminate at least 10 days prior to the effective date of such termination.
2. Termination for Cause. Notwithstanding the provisions of subsection 11(A) above, University may, upon 5 days’ written notice to Contractor set forth with specificity the basis for the termination, terminate this Agreement for Cause. For purposes of this Agreement, “cause” is defined as Contractor failure to perform the Services within the time specified herein or any extension thereof or Contractor failure to adhere to any of the material terms of this Agreement.
3. If this Agreement is terminated, University will only be liable for payment of goods received and services rendered prior to the date of termination and accepted by University.

11. Availability of Funds. The State of Florida’s and University’s performance and obligation to pay under this agreement is contingent upon sufficient appropriation by the Florida Legislature and other entities’ allowance of the University to use such funds. If the entities controlling such funding fail to appropriate funds or to allow University to use funds and University has determined, in University’s sole discretion, that there are insufficient funds available to cover University’s obligation under this Agreement, University has the right to terminate this Agreement for the upcoming year without damage, penalty, cost, or further obligation. University will notify Contractor at least 30 days in advance of a termination pursuant to this provision; University must pay for all services rendered until the date of termination.

12. Insurance. During the term of this contract, Contractor must maintain in full force at its own expense amounts of insurance that at a minimum cover the Contractor (or subcontractors’) exposure in performing this Agreement. University is self-insured and will provide its Certificate of Insurance upon request; University is not required to obtain additional insurance for this Agreement.

13. Force Majeure. Neither party will be deemed to be in default of its obligations if and so long as it is prevented from performing its obligations by an act of war, terrorism, labor strike, nuclear explosion, earthquake, hurricane, tornado, or other catastrophic natural event or act of God.

- 14. Compliance with Law.** Contractor will comply with all statutes, ordinances, rules, regulations, orders, and licensing requirements that are applicable to the conduct of its business, including those of federal, state, and local agencies having jurisdiction and/or authority over it. If this agreement is funded in any part with federal funds, the terms of section 202 of Executive Order 11246, as amended, are incorporated as if fully set forth in this agreement. The hyperlink in this agreement is for convenience only and any failure of it to function does not relieve the Contractor of any obligations of this clause.
- 15. Contractor.** Contractor is retained by University only for those purposes and to the extent set forth in this Agreement, and Contractor relation to University will, during the term of this Agreement, be that of independent Contractor. Contractor is not and will not be considered as having an employee status. Contractor is responsible for the payment of any taxes on any monies received by Contractor.
- 16. Prohibitions.** Unless expressly and specifically authorized in writing by University in advance, Contractor is prohibited from engaging in any of the following:
1. Incurring any debt or obligation on behalf of University;
 2. Entering into any contract, arrangement, or transaction which binds University to any extent or creates any obligation on University; and/or
 3. Utilizing University's name, credit, reputation, goodwill, resources, and/or assets for any purpose.
- 17. Travel.** Not applicable.
- 18. Notices.** Any notice to either party must be in writing and signed by the party giving it, and served:
1. By hand notice; or
 2. Through the United States Mail, postage prepaid, registered or certified, return receipt requested; or
 3. Through expedited mail or package service, if a receipt showing the delivery has been retained; or
 4. By e-mail and addressed as follows:

To UNIVERSITY:

The Florida Polytechnic University
Board of Trustees
Address: 4700 Research Way
Lakeland, FL 33805

To CONTRACTOR:

Name:

Address:

Attn: University Procurement
E-mail: procurement@floridapoly.edu

Attn:
E-mail:

CONTRACT MANAGER:

Attn: Procurement
Email: Procurement@floridapoly.edu

Notice is effective upon receipt.

19. **Assignment.** This agreement may not be assigned by Contractor without the express written consent of University.
20. **Governing Law.** This agreement and any amendments to it are governed by the laws of the State of Florida and venue for any actions arising out of this agreement must be in the state courts in Polk County, Florida.
21. **Software.** If Contractor is providing software, University may create and retain a copy of the software and related documentation for backup and disaster-recovery purposes, and for archival purposes for use after this agreement is terminated.
22. **Survival.** Any provision of this agreement providing for performance by either party after termination of this agreement survives termination and continues to be effective and enforceable.
23. **E-Verify.** All terms defined in section 448.095, Florida Statutes are adopted and incorporated into this provision. Pursuant to section 448.095, Florida Statutes, Contractor certifies that it is registered with and uses the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Contractor during the term of this agreement. If Contractor enters into a contract with a subcontractor to perform work or provide services pursuant to this agreement, Contractor must also require the subcontractor to comply with the requirements of section 448.095, Florida Statutes. The subcontractor must provide to Contractor an affidavit stating that the subcontractor does not employ, contract with, or subcontract with or to any unauthorized alien. Contractor must maintain a copy of such affidavit for the duration of the contract. University may terminate this agreement immediately upon notice to Contractor for any violation of this provision.
24. **Confidentiality of Information.** If Contractor is exposed to University's confidential information (such as donor information), Contractor will keep such information confidential and will act in accordance with any guidelines and applicable laws including the Family Educational Rights and Privacy Act (FERPA) and the Gramm-Leach Bliley Act.
25. **Conflicts of Interest.** Acceptance of this Agreement certifies that Contractor is aware of the requirements of Chapter 112, Florida Statutes and in compliance with the requirements of Chapter 112, Florida Statutes and other laws and regulations concerning conflicts of interests in dealing with entities of the State of Florida. Contractor certifies that its directors and/or principal officers are not employed and/or affiliated with the University unless a current Conflict of Interest (Report of Outside Activity/Employment) form has been completed, executed by such director or officer and approved in accordance with applicable University policies or rules. Violation of this section by Contractor is a ground for cancellation of this Agreement.
26. **Civil Rights.** The Contractor and any subcontractors must abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a) prohibiting discrimination against qualified individuals based on their status as



protected veterans or individuals with disabilities and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender, identity, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sexual orientation, gender identity, national origin, protected veteran status or disability.

27. Entire Agreement. This agreement and any documents incorporated specifically by reference represent the entire agreement between the parties and supersedes all prior oral or written statements or agreements. This agreement may only be amended by signed written amendments.

28. Exhibits. All exhibits listed below are incorporated into this agreement.

- A. Exhibit I –
- B. Exhibit II -

UNIVERSITY:

The Florida Polytechnic University
Board of Trustees

CONTRACTOR:

Signature

Signature

Print Name

Print Name

Date

Date

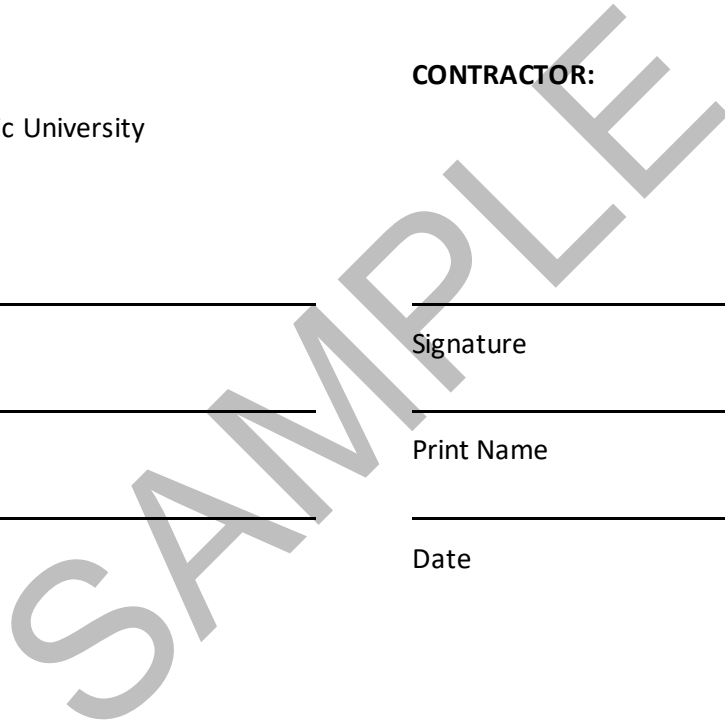


EXHIBIT I

SAMPLE

EXHIBIT II

SAMPLE

Please complete this form and include with proposal.

ATTACHMENT B - KEY PERSONNEL FORM

SIMILAR RELEVANT PROJECT EXPERIENCE

Provide a full description of Key Person's experience assigned to Florida Poly, including their role and the services they performed on 3 – 5 similar projects. (References are to be project references not employment references.)

NAME: _____

COMPANY NAME: _____

TELEPHONE NO. _____

EMAIL ADDRESS: _____

DESCRIPTION OF HOW THE CONTRACT WAS CONDUCTED:

START AND END DATES: _____

WHY IS THE CONTRACT RELEVANT TO THE UNIVERSITY'S NEED?

PLEASE DUPLICATE THIS FORM AS NEEDED FOR ALL KEY PERSONNEL

Please complete this form and include with proposal.

ATTACHMENT C - COMPANY CONTRACT EXPERIENCE

***The Offeror is to complete this "Contract Experience Form" for three to five contracts of similar scope and complexity performed over the last five years. Contracts may be from both private and public sector clients however, public sector experience is preferred. ***

OFFEROR: _____

Company/Institution Name: _____

Company Address: _____

City: _____ State: _____ Zip Code: _____

Contact Name: _____

Contact Email Address: _____

Contact Phone Number: _____

Contract Location (s): _____

Contract Type: _____

Contract Value: _____

Term of Contract _____

Description of Services Performed:

PLEASE DUPLICATE THIS FORM AS NEEDED FOR ALL EXPERIENCE AND REFERENCES

ATTACHMENT D - PRICE PROPOSAL FORM

Complete this form, sign and return in your Financial Proposal.

Please Attach:

1) Compensation/rate schedule and job title/role for all personnel, see attached template.

a) The rate schedule shall include a rate breakdown for onsite, and remote work.

b) All rates should be blended rates inclusive of expenses.

Please include detail description to include pricing for any Optional and/or Value Add Opportunities.

The services identified in the Scope of Work will be requested on a standard time and materials basis or lump sum per project and on an as needed basis and the University will be billed for actual work performed.

Firm Name _____

Authorized Signature _____

Printed Name _____

Date _____

