

## **Implementation Partner - RFT**

Request for Tender 2021-01.4

### **Tender Specifications**

**Status: Final | Version: 1.0 | Date: 10<sup>th</sup> March 2022**

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## 1. Document Purpose

The purpose of this document is to provide an overview of the university's requirements and outline our expectations from the responders.

The following list of attachments are included with this document (RFT Specifications):

- Attachment A – HR Functional requirements and Workday response
- Attachment B – Finance Functional requirements and Workday response
- Attachment C – Non functional requirements and Workday response
- Attachment D – Workday implementation scope – supplementary information
- Attachment E – Current and Target state Architecture
- Attachment F – Proposed integration list
- Attachment G – Data migration list
- Attachment H – Academic and General Staff Employees Agreement
- Attachment I – TAFE Teaching Staff Agreement

## 2. Information for Responders

### 2.1 Introduction

At Federation University, we are driven to make a real difference to the lives of every student, and to the communities we serve. We are one of Australia's oldest universities, known today for our modern approach to teaching and learning. For 150 years, we have been reaching out to new communities, steadily building a generation of independent thinkers united in the knowledge that they are greater together.

Across our university and TAFE campuses in Ballarat, Berwick, Brisbane, Gippsland, and the Wimmera, we deliver world-class education and facilities. With the largest network of campuses across Victoria, as well as a growing Brisbane base, we are uniquely positioned to provide pathways from vocational education and skills training at Federation TAFE through to higher education.

For further information on Federation University visit <https://federation.edu.au/>

### 2.2 Objective

Federation University is embarking on a transformational program to replace its existing ageing Finance and HR systems (including payroll), and modernise its supporting business processes. The university through a series of RFTs has identified Workday as its preferred ERP platform for Finance and HR functions, and Ceridian Ascender Pay as its preferred payroll solution. Federation University is now seeking an experienced implementation partner who can lead this transformational change at the university.

Upon completion of this RFT, Federation University would like to achieve the following:

- Identify an implementation partner who can collaborate with the university's business process owners to implement Workday Finance and HR functions, and drive business process transformation
- Develop clear understanding of a preferred implementation approach and roadmap
- Develop detail understanding of how Workday HR and payroll implementation will run concurrently and collaboratively in a risk-controlled environment
- Develop clear understanding of how systems integration requirements will be met
- Identify project team structure and role clarity
- Comprehensively understand all key risks and required mitigation
- Have transparent pricing and a clear understanding of the total cost of implementation
- Have a clear implementation partner performance management framework

### 2.3 Communications during the tendering process

All communications including questions and feedback relating to this RFT must be entered via eProcure

**Commented [BA1]:** Workday HCM & Financials

**Commented [BA2]:** Ascender Pay (payroll)

**Commented [BA3]:** HR Transformation Advisory. ACTION: need to interlock with Susie Quirk's team

**Commented [BA4]:** Need to understand Powered HR & Finance offering applicability. ACTION: Confer with Hilda

**Commented [BA5R4]:** Hilda has actioned – made intro to Caroline – AB to follow up

**Commented [BA6]:** Need to work with Ascender/Preceda Consulting teams to inform collaboration and concurrency of implementation/integrations etc. ACTION: liaise with Nona/Ben if Hilda agrees that this does not contravene with 2.3 (Improper assistance)

- **Unauthorised communications**  
Communications (including promotional or advertising activities) with staff of the university during this RFT process are not permitted.
- **Improper assistance**  
Responders must not seek or obtain the assistance of employees, agents, or contractors of the university in the preparation of their RFT. The university may, in its absolute discretion, disqualify a Responder that it believes to have sought or obtained such assistance.

## 2.4 Key Dates

Key dates for this RFT are indicated below. These dates are advised as a guide only to project timelines and the university reserves the right to vary all dates.

If key dates change the university will notify the responders via its eProcure portal. It is the responder's responsibility to ensure they monitor this portal for updates.

### Indicative Key Dates:

Action	Date
RFT released	15 <sup>th</sup> March 2022
Last date to submit questions	25 <sup>th</sup> March 2022
Response due	1 <sup>st</sup> April 2022
Presentations (2 hrs)	4 <sup>th</sup> – 8 <sup>th</sup> April 2022
Shortlisted Vendors advised	14 <sup>th</sup> April 2022

For shortlisted vendors:

Action	Date
Request for additional information	14 <sup>th</sup> April 2022
Submit response	29 <sup>th</sup> April 2022
Workshops / Presentations (as required)	2 <sup>nd</sup> – 13 <sup>th</sup> May 2022
Preferred implementation partner nominated	To be advised



## 2.5 Evaluation of Responses

This RFT is released to all vendors that are part of the certified implementation partner network of Workday within Australia. All vendors are requested to submit a compliant response by the due date through the university's eProcure portal and meet with university stakeholders to present key aspects of their proposal in a 2-hour discussion. Federation university will undertake a multi-stage evaluation process, as outlined below:

### Short-listing:

Suppliers will be shortlisted through:

- Evaluation of prescribed information provided in response to this RFT and subsequent presentation(s).
- Responses to any clarifying questions from Federation University to the responders.

### Identifying preferred supplier:

Shortlisted suppliers will be notified via our eProcure portal and will be required to provide additional information and participate in a series of workshops designed to identify and align Partner and University capabilities and project overview. Criteria to be utilised for the evaluation of shortlisted vendors will include but not limited to an assessment of the following:

- Response to this RFT including response to any additional information sought by the university
- Implementation **references**
- Response to additional information sought by the university in written or workshop form including, but not limited to, detailed project plan, commercial risk, proposed contract terms and financial due diligence.

**Commented [BA7]:** Monash, UQ, ....? ACTION: Confer with Hilda

The following evaluation criteria will be utilised for shortlisting:

Ref.	Evaluation Criteria
1.	<b>Relevant experience and past performance</b> Experience with similar implementations of the proposed solution at other similarly complex organisations, for example dual sector universities.
2.	<b>Organisational capability including resources</b> Capability of the organisation and of the resources working for the organisation
3.	<b>Demonstrated understanding of our requirements and architecture landscape</b> Ability to align with university's expectations, future digital vision, design principles and risk profile
4.	<b>Implementation approach</b> Outline the implementation approach optimised to the University's requirements and objectives
5	<b>Trust, confidence and strategic alignment with Federation university</b> Can the vendor fulfill the university goals and realise expected business benefits while working within known constraints

A different or additional criteria might be used for assessment of the shortlisted vendors to determine the preferred supplier.

## 3. Organisational context

### 3.1 Program Overview

Federation University has centralised Finance, Human Resources (People and Culture) and IT Services teams



reporting to the university's Chief Operations Officer. Key university processes and reporting functions are delivered through aging systems, rely heavily on manual intervention and create a business continuity risk. The existing Financial and Human Resources (HR) systems include a number of software solutions, Access databases, Excel spreadsheets and manual interventions. This exposes the university to a high level of risk relating to the accurate and timely reporting and management of key business information. These risks are exacerbated due to the university's key finance system being several versions behind which cannot be seamlessly upgraded, its payroll system was implemented more than 20 years ago limiting further development and there is no single HRIS.

Federation University sees the opportunity to transform its business operations through the implementation of a new ERP platform to drive efficiencies, reduce risks associated with manual processes and deliver an improved experience for staff and students. Additionally, ability to operate the universities capability on a single-source of data to improve report and decision making is sought. The level of process renewal is expected to be University wide, going beyond the affected Human Resources and Finance Directorates, and will need to be carefully planned and phased to reduce severe impacts to the university's ability to deliver core services. The university is looking to change the ways of working to align with contemporary processes and procedures, rather than change the software solution to meet its current processes. It is expected that the majority of existing business processes will benefit from best practice options offered by the selected systems.

The university has initiated an ERP program of work, led by the university's Program Director and reporting to the Chief Operations Officer, to seek a solution to streamline these diverged systems and business processes. The university through a competitive RFT process has nominated Workday and Ceridian Ascender Pay as its preferred software platform providers and it is now seeking to appoint an implementation partner.

### 3.2 Current State

At present the university doesn't have a complete HR system and the current finance and payroll systems are several versions behind the latest offering. There are several inefficiencies within our current state, including:

- Without a HR system, Federation is maintaining key data in offline systems like excel, which presents a security risk, as well as the risk of human error. This requires excessive effort to perform activities such as OH&S, position management, and related finance activities that are reliant on HR information.
- The Payroll system is unable to keep up with the university's complex staff agreements and requires extensive manual effort to formulate, validate and pay its staff correctly and on-time.
- The Finance system cannot be upgraded without a reimplementation and will soon be unsupported.
- Due to operating numerous point solutions which are either not integrated with each other or inadequately integrated, there is an increased cost of managing the data flows between systems necessary to perform business processes.
- Fragmentation of business processes and disjointed workflows has led to duplication of data, and a high level of manual data entry and intervention. This exposes the university to a high level of risk relating to the accurate and timely reporting, and management of key business information.
- Operational processes have long lead times.
- Data quality and integrity issues exists, resulting in unreliable and effort-extensive reporting.
- Inconsistent user experience across multiple systems.
- No easy way to track incidents and enquiries exposing the university to potential compliance breaches.
- High total cost of ownership.
- Systems that are complex and unable to be upgrade without significant reimplementation effort.

**Commented [BA8]: PROBLEM STATEMENT:**

- processes and reporting functions are delivered through aging systems
- heavy reliance on manual intervention
- represents a business continuity risk
- lack of single source of data to inform decisioning

**Commented [BA9]: QUESTION: When will Finance system become unsupported?**

**Commented [BA10]: QUESTION: Overhead cost/#FTE of additional staffing to manage duplication and inefficiencies in processed & data exchange**

**Commented [BA11]: RISK: Wage Compliance of existing payroll**



The university has two separate agreements covering its staff and a copy of the agreements is provided as 'Attachment H - Academic and General Staff Employees Agreement' and 'Attachment I - TAFE Teaching Staff Agreement'. The Higher Education EBA expired in December 2021 and a new agreement is being negotiated. It is expected that a new EBA will be ratified during the implementation and as such, some time will need to be allocated to review the changes and implement them as required.

### 3.3 Future Vision

Federation University is looking for a solution that can provide rich functionality to deliver, manage and execute Federation's core Finance and HR functions including payroll. The university is looking to implement Workday ERP solution together with Ascender Pay to transform our business processes. The following benefits are expected through this investment:

- Transform HR and Finance business processes by adopting standard 'out-of-box' processes to minimise manual data entry and intervention. The university is looking to embed a mindset of 'no customisation' across operations and change the ways of working to align with contemporary processes and procedures, rather than change the solution to meet Federation's current processes. It is expected that the majority of existing business processes will benefit from best practice options offered by the selected systems.
- Tightly integrated platform that becomes one source of truth for data to improve reporting and decision making, eliminating the need for building integration between core functions.
- Consistent user experience and secure self-service access from any device.
- A software as a service (SaaS) solution that is scalable, easy to maintain, easily upgradeable and will remain current with changing business needs through regular updates.
- Simplification of Federation's application landscape and management of multiple vendors.

### 3.4 Design Principles

It is expected the ERP solution together with the payroll solution will be aligned the university's design principles that underpin our digital vision:

Be Learner Centric & Staff Supportive	<ul style="list-style-type: none"><li>- Understand and factor in the learner lifecycle;</li><li>- Enhance the learner digital experience regardless of how or why they engage;</li><li>- Empower Staff to leverage new technologies.</li></ul>
Empower & Inform Digital Dexterity	<ul style="list-style-type: none"><li>- Deliver tailored training for both staff and learners, demonstrating the principles;</li><li>- Promote industry-based knowledge sources to improve broad technical knowledge;</li><li>- Involve all effected stakeholders during the implementation of an ITS project.</li></ul>
Drive Efficiency & Reduce Manual Processes	<ul style="list-style-type: none"><li>- Automation and innovation - utilise Artificial Intelligence to reduce manual effort;</li><li>- Demand appealing User Interfaces (UX), easy to use systems and applications;</li><li>- Adopt industry standard, best practice processes and minimise customisation.</li></ul>
Move to a Single Source of Truth	<ul style="list-style-type: none"><li>- Reduce manual process steps and data duplication, leading to improved data quality;</li><li>- Continue to buy and build systems to enable Master Data Consolidation;</li><li>- Leverage off data consolidation to enhance reliable analytics and reporting.</li></ul>
Adopt System as a Service (SaaS) approach	<ul style="list-style-type: none"><li>- Support flexibility, scalability, currency against best practice &amp; reliability in systems;</li><li>- Reduce development and maintenance costs by sharing across all product customers;</li><li>- Drive collaboration, with all customers sharing the single core vision of the product.</li></ul>
Target Technology Risk, Security & Compliance	<ul style="list-style-type: none"><li>- Embed laws, regulations and policies regarding Data security and privacy;</li><li>- Changes in the law and regulations must drive changes in processes or systems.</li></ul>
Rationalise University System Landscape	<ul style="list-style-type: none"><li>- Look to rationalise systems, re-purposing existing applications where possible;</li><li>- Reduce integration complexity by reducing customisation;</li><li>- Leverage off Enterprise platforms to simplify the University's technology landscape.</li></ul>
Embrace Design thinking & Agile Deployment	<ul style="list-style-type: none"><li>- Developing the digital environment requires University-wide commitment &amp; effort;</li><li>- Reskilling of resources is needed to implement in a collaborative &amp; Agile way;</li><li>- Ensure systems are fit for purpose for all impacted University stakeholders.</li></ul>

## 4. Scope of services

### 4.1 Overview

This section provides an overview of the services required by Federation University for the implementation

**Commented [BA12]:** RISK: Where possible, we need to be across what material changes will be reflected in the FWA EBA to assess/plan for this / the new EBA to be reflected in our design & build. NOTE: This also makes parallels across HR/Payroll implementations more complex (old vs new) ahead of business acceptance/signoff prior to go live/cutover

**Commented [BA13]:** Confer with Hilda but I think Powered HR (with its pre baked best practice processes and config) should help achieve this vision



of Workday Finance and HCM solution. The following list of Workday SKUs are being considered for implementation and the proposed solution must not assume provision of any other Workday SKU.

Workday HCM SKUs	Workday Finance SKUs
Core Human Capital Management	Core Financials
Cloud Connect for Third Party Payroll	Projects
Talent Optimisation	Expenses
Help	Procurement
Learning	Financial Planning
Recruiting	
Time Tracking	
Workforce Planning	

**Commented [PYM14]:** @Joshi, Sweta Compensation seems to be missing. Should we ask about it?

Additionally Workday Delivery Assurance services, Workday Adoption Kit, Workday Learn on Demand Libraries for HCM / Finance and Workday training credits are being considered.

HR and payroll will likely be implemented together in parallel and the university would consider running the implementation of Workday Finance concurrently if the risks associated with a large implementation can be mitigated and managed. The university will rely on the experience of its selected implementation partner to determine if multiple releases (multiple go-live) are required and its implementation sequence.

## 4.2 Requirements, Design and Architecture

Prior to the selection of Workday as the university's preferred ERP provider, a list of the university's functional and non-functional requirements was compiled. For each of the university's requirements, Workday has stated how it could be met through configuration of their product. These requirements are included as 'Attachment A – HR Functional requirements with Workday response', 'Attachment B – Finance Functional requirements with Workday response' and 'Attachment C – Non-functional requirements with Workday response'. Additional supplementary information on the scope is provided in 'Attachment D – Workday implementation scope – supplementary information'. Selected implementation partner will be required to develop solution design based on the best practice methodologies recommended by Workday to deliver the university's functional and non-functional requirements. This will be inclusive of, but not limited to, the following activities and deliverables:

- Development of business and technical specifications aligned with Workday methodology
- Documentation of system configuration requirements
- Deliver the university's functional and non-functional requirements through the configuration of Workday SKUs listed in the section above, business process redesign and building the required integration interfaces including the integration with Ascender Pay payroll solution.
- Maintain and track the list of university's functional and non-functional requirements in a collaborative tool such as Atlassian Jira.
- Design and documentation of the system architecture inclusive of all interfaces required to and from Workday solution. A high-level overview of current state and future state target architecture is provided in 'Attachment E – Current and Target State Architecture'.

**Commented [BA17]:** Check with Hilda is JIRA is a KPMG IT Approved application. Confer also with Paul on what PM tooling is most commonly used

Attachment A, B and C may contain references to Workday SKUs that are not listed in the above section. Federation university is not considering procuring additional Workday SKUs not listed in this document and the selected implementation partner would be required to take this into consideration when redesigning



#### 4.3 Configuration and Integration

Selected implementation partner will be required to:

- Deliver the university's functional and non-functional requirements through the configuration of Workday SKUs listed in the Overview section above, business process redesign and building the required integration interfaces including the integration with Ascender Pay payroll solution.
- Keep documentation of system configuration requirements
- Design and document the system architecture inclusive of all interfaces required to and from Workday solution. A high-level overview of as-is and to-be architecture is provided in 'Attachment E – Current and Target state Architecture'.
- Build and deploy all required integration interfaces in collaboration with Ascender Pay, university's ITS team and other service providers. An indicative list of integration interfaces is included in 'Attachment F – Proposed integration list'
- Ensure all built integration can perform to a pre-agreed baseline performance indicator.

It is envisaged that the implementation partner will guide the university SMEs on available out of box processes and best practices that can deliver university's requirements, carry out all the functional configuration required for Workday solution and build all interfaces in and out of Workday to Ascender Pay and or to a middleware solution. Development of integration interfaces between a middleware solution to other university systems will be the responsibility of Federation university.

#### 4.4 Testing

Federation university will be responsible for the end to end testing of the solution including user acceptance testing. Selected implementation partner will be required to:

- Assist Federation university staff in preparation of a test strategy and test plan
- Ensure the configuration built by the implementation partner is tested by the implementation partner before it is made available to the Federation university staff for testing
- Assist Federation university staff in development and execution of test scenarios, cases and scripts for the testing of system configuration and business processes
- Develop and execute test scenarios, cases and scripts for system integration testing of all system interfaces inbound and outbound of Workday
- Facilitate security and penetration testing that Federation university may carry out either through its ITS team or through a third-party
- Facilitate up to three payroll parallel test runs of the payroll solution including loading of all required data into Workday and transfer of required data required from Workday to the payroll system
- Ensure data required for all testing activities is timely made available
- Assist Federation university staff in carrying out user acceptance testing including testing of end-to-end business processes and user access control

#### 4.5 Data Migration and Retention

Implementation partner will be required to:

- Prepare a data migration and data validation plan
- Carry out any required data mapping and conversion prior to data load
- Load data to Workday non-production and production environments required for testing activities and for go-live. Multiple rounds of data migration extraction and loading will be required to facilitate testing including payroll parallel runs and defect resolution validation.
- Assist Federation University in building and executing a data retention solution for data that is not being migrated to Workday but is required to be retained

Federation university will extract and cleanse the required data for migration and archiving. Initial assessment is that university's finance data quality is good however HR data is likely to have data quality issues given the age of the payroll system and lack of a HRIS. Federation university has created a new Chart of Accounts (COA)

**Commented [BA18]:** We can do end point testing in an effort to ensure integration parses information correctly however my experience has always been that E2E should always be performed to ensure the right information is being sent via built integrations at the right time aka onboarding, exit/terminations with consideration to work scheduled and pay cycles/frequency. We may need to clearly spell this out

**Commented [BA19R18]:** Attachment D – P10 confirmed Fortnightly pay frequency for all staff/workers

**Commented [BA20]:** I think there is another test which is post pay run in Ascender Pay – being able to have payroll actuals conferred back to WDAY Finance for financial reporting purposes (GL and Leave Liability) – see Attachment F, integration #5

**Commented [BA21]:** RISK: Wage Compliance – there will likely be deviations in pay calcs but we will need to report and ensure these are accepted in parallel payroll testing. Eg. Where EBA talks of an allowance (superable/non-superable or All Purpose or Fixed), QUESTION: where will these be flagged – in the HR master data in Workday or maintained in Payroll?



structure that it wants to migrate to and mapping from old COA to new COA will be required when migrating financial data. Additional information on data migration requirements and data volume estimate is included in 'Attachment G – Data migration list'.

#### 4.6 Reporting

There is significant reporting out of existing systems and several reports are manually collated. The total number of reports setup within the existing payroll and finance systems runs into hundreds, however a large number of these reports are for operational reporting which may no longer be required when the required information is made accessible through Workday dashboards or similar means. Implementation partner will be required to

- Work with the university staff in assessing which reports and dashboards are required to be built out of Workday
- Assess which pre-built Workday reports can be utilised by the university
- Document and track which of the required reports and dashboards will be built by the selected implementation partner and which reports or dashboards will be built internally by the university staff
- Upskill the university staff on how to access required operational information and build dashboards and/or reports

**Commented [BA22]:** Training requirement in Report Writer

#### 4.7 Change Management and Training

Federation university will manage the overall whole of program change including the design of a future target operating model.

Implementation partner will be required to take ownership of the delivery of training to all identified users:

- Provide business process documentation that aligns to the designed end to end business processes
- Determine functionality and the associated business processes that users will need to be trained in, training resources that will need to be developed, modes of training that will best meet user needs, and the amount of training required. A blended learning framework incorporating a variety of modes of training will likely be required. This will include remote training, face to face, online training materials, followed up by email, phone and chat support
- Build a training plan and all required training material, including online self-help material
- Deliver training required to perform their duties to all users of the system. Federation university will provide administrative support to ensure availability of users to attend training, engagement with training resources and follow up support

**Commented [BA23]:** We facilitate all Workday training

#### 4.8 System upgrades during the implementation period

Selected implementation partner will be required to coordinate bi-annual upgrade of Workday including any required testing and remediation work for all features being implemented or within its hyper care period. Federation university will be responsible for testing and any remediation work required for all Workday features in production (post go-live) after the completion of hyper care period.

#### 4.9 Non-production environments

Implementation partner will be required to maintain configuration, data and integration on all required non-production environments for all required activities during the implementation.

#### 4.10 System access control and security roles

Implementation partner will be required to:

- Identify and document the university's user role and access control requirements
- Configure the required user roles and access control in Workday non-production and production environments
- Ensure security of university's data throughout the implementation

#### 4.11 Other non-functional requirements



Implementation partner will be responsible for delivering non-functional requirements as outlined in the 'Attachment C – Non functional requirements and Workday response'.

#### 4.12 Production cutover

Selected implementation partner will be required to:

- Build transition plans, deployment plans, run-sheets, production verification tests and other artefacts required to effectively manage the production deployment
- Coordinate any required 'dress rehearsals' to prepare for production deployment
- Co-ordinate deployment of other systems and interfaces that are required to go-live along with the Workday solution
- Provide documentation required for operational readiness

#### 4.13 Post go-live support

Implementation partner will hold primary responsibility to support Workday solution and associated integration interfaces during a Hyper care period commencing at go-live of each release. Hyper care period is anticipated to be 4 to 6 weeks and during this time the implementation partner will be required to complete any deferred activities as agreed with the university.

#### 4.14 Program governance and management

Implementation partner will be required to work collaboratively under the overall program governance and management structure established by the university. Implementation partner is required to appoint project manager(s) to manage the delivery using their own approach and methodology that have been proven to work on similar projects. It is expected that the implementation partner will:

- Appoint resources with relevant experience to project manage the delivery of their tasks
- Nominate a senior executive to join the program steering committee
- Work within the overall program governance structure led by the program director and program steering committee.
- Liaise with the program coordinator, project managers and other members of the project team appointed by the university.
- Attend project meetings as required for the program/project delivery
- Build and maintain project implementation schedule
- Provide status reports in an agreed format and present to project governance bodies as required.
- Track and manage program risks and issues in a transparent way utilising online risks and issues registers that will be provided by the university

#### 4.15 Excluded and Out of Scope Services

The following tasks and services are out of scope:

- Decommissioning of existing systems
- Purchase of any software licenses or SaaS fees
- Student and course information management
- Changes to any other internal system other than Workday required during the implementation. For example, changes to chart of account structure will require changes to multiple internal systems and this will be managed by Federation university.

### 5. Response

A response must be submitted by the due date via Federation University eProcure portal **by 2pm AEDT on Friday 1<sup>st</sup> April 2022**. The following information is required to be submitted as part of your response and additional relevant information can be included:

#### 5.1 Compliance

Provide organisation and insurance details as specified via eProcure Portal

CRICOS Provider No. 00103D | RTO Code 4909

## 5.2 Organisational capability and experience

Federation university would like to understand your organisational capability, organisational experience and the experience of your resources. Include the following information in your response:

- An outline of your experience in implementing Workday SKUs being considered by the university for your other customers and clients. Mention the organisation, industry, what was implemented, when was it implemented and include detail on:
  - o whether it was enabling of a new previously unused Workday SKU or enhancement of an existing functionality in use by your customer,
  - o if your organisation were directly engaged by your customer to deliver this work or if you provided resources for this work to another organisation such as Workday Professional Services who were engaged to do this work, and
  - o highlight examples that are similar in size, scale and scope to Federation university's requirements, including other Australian universities.
  - o highlight where your organisation is providing ongoing post-implementation support
- Provide examples where you integrated with a payroll solution and if it was an existing payroll solution in use by your client or a new parallel implementation of that payroll solution. Highlight examples where you integrated with Ascender Pay.
- Provide detail of Workday certified resources directly employed by your organisation highlighting their certifications and location (for e.g. Melbourne, Sydney, overseas).
- Provide detail of Workday certified resources not directly employed by your organisation but that are available to your organisation through a related entity (such as any resources employed by any of your offshore entities), including their location and highlighting the projects where they have worked for your organisation for one or more of your clients.
- Assuming a July 2022 start date, provide summarised profiles of the available and nominated key staff that will be assigned to deliver the services (including staff from any related entities). The response should cover titles, Workday certifications, details of relevant experience, location and roles/functions to be performed.

## 5.3 Implementation approach and methodology

Detail your overall implementation approach and methodology you propose to ensure a successful implementation of the scope specified in this document and its attachments. Detail the following items in your response:

- **Team structure and roles:** provide a draft program team structure that you propose to deliver the scope, including all roles and resources required from Federation university.
- **Implementation, release schedule and resource plan:** provide a draft high-level implementation schedule covering key milestones from project initiation to go-live across HCM and Finance. Clearly outline any proposed multiple phased releases or deployments for HCM and Finance and provide the rationale behind your recommendation. Outline the activities and personnel required from both the university and your organisation for each phase.
- **Project management and governance:** Outline how you would contribute to the efficient and effective management of this program of work. Include:
  - o your approach to manage risks, issues and decisions required
  - o your proposed process to manage any changes to agreed scope
  - o your approach to sharing your organisational experience to help guide the program team in delivering agreed objectives on time and within budget
  - o your approach to the management of dependencies arising from activities to be completed by others
  - o details of any reporting you propose to track milestones, risks, issues and dependencies
- **Solution design:** detail your approach on how you will work with the university staff to determine the required business processes, system configuration and integration requirements. Specify what documentation you propose to produce and maintain to track this information
- **Configuration, integration and testing:** detail your approach to:



- making functional and non-functional configuration changes to the system and tracking of such changes across multiple environments
  - building and scheduling of integration interfaces
  - ensuring configured functionality is of good quality before it is given to testers for testing
  - timely resolution of queries and issues reported by testers
  - ensuring built integration can perform to agreed baseline performance levels
- **Data migration:** detail your proposed approach to data migration and retention, and list any deliverables that will be created to support your data migration approach
- **Cutover:** detail your proposed approach to managing Cutover activities ensuring required business and technical readiness
- **Non-production environments and release management:** detail your approach to managing configuration across multiple non-production environment and how would you ensure the work has been adequately backed up. Specify how many non-production environments will be required during the implementation and what will they be used for.
- **Reporting:** detail your approach to identifying and delivering on the university's reporting requirements. Outline your approach to ensure optimal use of dashboards and other means of accessing data to avoid replicating the current state where there are hundreds of reports configured in the university's finance and payroll systems.
- **Training:** detail your approach to building training plans, training material and matching staff training needs with suitable training mode
- **Other non-functional requirements:** detail your approach to managing system access control, security roles, Cutover activities, hyper care and other non-functional requirements
- **Other value-add products and services:** Provide detail of any relevant value-add products or services you can provide to the university such as pre-built reports, data migration tools, chart of account mapping process, testing scripts, etc.

## 5.4 Colocation

The university will prefer that its entire project team is collocated at a minimum of 2 days per week and the university can provide desk space at its Mt Helen (Ballarat) campus for the entire project team. Respondents are required to include in their response if their resources will travel to our Mt Helen campus two days per week.

It is likely to be more convenient for the majority of the staff to be co-located at a location in Melbourne. Respondents are required to include in their response any workspaces they can provide to the university staff working on the project at their Melbourne based office location.

## 5.5 Collaboration with payroll implementation

Workday HCM and Ceridian Ascender Pay implementation are likely to be tightly intertwined with significant cross dependencies. Effective collaboration between the resources implementing Workday HCM and Ascender Pay will be required to ensure a successful implementation. Include in your response what measures will you take to facilitate collaboration and highlight your past experience where such measures contributed to the success of the project.

Federation University may opt to designate one prime Systems Integrator (SI) to manage all aspects of ERP and payroll implementation. Such an arrangement will require your organisation to sub-contract the payroll vendor (Ceridian). Ceridian has made representations to the university that they are open to entering into such a relationship with a prime SI. In your response specify whether your organisation will be willing to work as the prime Systems Integrator and sub-contract the payroll vendor (Ceridian), and highlight any relevant past experience you have in working under such a commercial and operations model. We are not seeking commercial details of such a model at this stage as part of your initial response.

**Commented [BA24]:** Hilda – is this permissible/agreeable for client staff to operate from KPMG offices if we elect to collocate in Melbourne as opposed to Mt Helen? Thinking here of Chinese Walls / independence...

**Commented [BA25]:** Hilda – would KPMG accept/receptive to take the Lead/or “Prime” SI role? Thoughts are, if we perform this function, we will want to have an overarching Project Director role overseeing both entities delivery. To de-risk this, I think it would have to be priced at a premium should this be something you feel comfortable with.