CNB/CED ORACLE TIME AND LABOR, ABSENCE MANAGEMENT AND WORKFORCE SCHEDULING REQUEST FOR PROPOSAL

UKG Kronos to Oracle Time and Labor, Absence Management and Workforce Scheduling Implementation

Table of Contents

1 Time & Labor, Absence Management, Workforce Scheduling Purpose and Summary

1.10 Introduction

Cherokee Nation Businesses (CNB) is seeking a qualified vendor to implement Oracle Time and Labor, Absence Management, and Workforce Scheduling (OTAS) to support accurate time capture, labor costing, compliance, and payroll integration across two business units (CNB/CED), which consists of 8 legal employers.

CNB/CED currently uses UKG Kronos. Oracle Time and Labor, Absence Management and Workforce Scheduling Cloud platforms have been selected as the new solution that both BUs will migrate to. When an exception is required, a governance committee will set priority, strategy, and decision on how the exception is managed.

The purpose of this request for proposal (RFP) is to find a systems integrator that has the reach, experience, and skills to implement Oracle Cloud-based Time and Labor, Absence Management and Workforce Scheduling and the Oracle Fusion Financial Implementation. It is not required that the same integrator be rewarded for both projects. However, it would be preferred. Click *here* to reference the Oracle Fusion Cloud Financial Implementation Project RFP. The vendor will be part of a collaborative team that includes people from Oracle and CNB/CED. This team will advance CNB/CED capabilities enabled by new processes, digital technologies, and a transformed workforce.

The intent of this RFP is to award the full scope of work to a single vendor. However, the initial contract award may be limited to **Phase 1: Discovery, Requirements Gathering, and Design** only.

Vendors must submit responses and pricing for the **entire implementation**, with costs clearly broken out by **Phase 1** and **Phase 2 (Implementation, Deployment, and Rollout)**.

Upon completion of Phase 1, CNB will reevaluate and determine whether to proceed with awarding Phase 2 to the selected vendor based on performance, deliverables, and project alignment. However, CNB reserves the right to award contracts as a whole, by item, part, or portion of an item, or by groups of items. CNB also reserves the right to reject any and/or all proposals in whole or in part if it serves the best interests of the organization. The selected vendor may propose revised pricing for all phases following Phase 1, based on the outcomes of the Discovery, Requirements, and Design phase and subject to CNB review and approval.

All respondents to this RFP, and the resources that they will bring, will be referred to as "vendor" or "vendors."

NOTE: **O**racle **T**ime and Labor, **A**bsence Management, and Workforce **S**cheduling has been abbreviated throughout this RFP as **OTAS**.

1.11 Implementation Overview

CNB/CED has created a set of assumptions that address the requirements of the CNB/CED Oracle Time and Labor, Absence Management and Workforce Scheduling implementation. They are as follows:

1.11.1   Overall Implementation Assumptions

The overall implementation assumptions for the vendor are

- Implement Oracle Time and Labor, Absence Management and Workforce Scheduling Cloud for 2 Business Units (CNB/CED), which consists of 8 legal employers. ~500 colleagues, 2+ integrations, automated time off policy based on Oracle HCM employee field(s), 15+ reports, 5+ Train-the-Trainer (TTT) sessions and will work with the implementation team on configuration as opposed to the vendor doing configuration and then training.

- Design, configure, test, and deploy security for Oracle Time & Labor, Absence Management, and Workforce Scheduling solutions.

- Design, configure, test (including a user acceptance test (UAT)), deploy to production, and post go-live support.

- Perform three cycles of data conversion and reconciliation before the rollout.

- Leave Balances will be loaded.

- Identify process to capture starting balance, accruals, leave taken from January 1st to go-live date.

- Create an implementation user guide that includes screenshots with step-by-step callouts.

- Lead the implementation effort from design through rollout.

- Design, configure, test gratuities and tips according to the Cherokee Nation Minimum Wage Act.

    o   Determine segregation of current minimum wage adjustment fast formula calculation

- Design, configure and test scheduling and multiple jobs

- Configuration for hourly/non-exempt employees

- Configuration of overtime rules

- Configuration of any applicable fast formulas

Note: CNB/CED will provide the necessary resources, including a dedicated core team with Oracle Cloud skills to support this implementation.

1.11.2   Discovery, Requirements, and Design Assumptions *(Phase 1)*

- Perform Discovery of current state.

- Work with the business to gather requirements.

- Perform current state and future state design and process analysis.

- Lead the effort to define CNB's new Enterprise Structure for Time & Labor, Absence Management, and Workforce Scheduling including Enterprise Reporting strategy to address local requirements.

- Build a detailed project plan to complete implementation and rollout.

- Provide in-person attendance in Design workshops at 80% in-person and 20% virtual.

Note: At the end of the Design phase, CNB and the vendor will reassess the scope of work and implementation costs.

1.11.3   Change Management Assumptions
Change Management assumptions for the vendor are

- Lead change and communications strategy and implementation in partnership with CNB/CED.

- Lead stakeholder engagement and user adoption.

- Provide Train-the-Trainer (CNB/CED will deliver end-user training).

1.11.4   Technical Architecture and Data Assumptions
- Potentially, convert the prior two-year balances and current year transactions for data conversion and reconciliation.

- Data extract cleansing will be completed by CNB/CED, including all required data transformations.

1.11.5   Detailed Objectives
- Support hourly, salaried, exempt, and non-exempt employees
- Enable labor costing by project, department, grant, or cost center
- Improve compliance and auditability
- Integrate seamlessly with Oracle HCM and Payroll
- Integrate Scheduling
- Vendor must address
  - FLSA compliance
  - State and local labor law support
  - Audit trails and reporting
  - Data Retention
  - Cherokee Nation Minimum Wage Act
  - Leave balance and accruals to finance

1.11.6   Functional Scope
- Time entry (web, mobile)

- Time clock evaluation and set up (are new clocks needed or are existing compatible)

- Schedules and shifts

- - Multiple jobs
    - Ability to flag overtime
    - Punch flags outside of schedule
  - Overtime rules and labor laws
  - Absence and leave integration
  - Approvals and exception handling
  - Retro time adjustments

1.11.7   Technical Scope
- Oracle Time and Labor, Absence Management, and Workforce Scheduling configuration
- Integration with:
  - Oracle HCM Core HR
  - Payroll
  - Financials (labor costing with Oracle Fusion Financial)
  - PayActiv
- Security and role-based access

1.11.8   Testing & Validation
- Timecard accuracy testing
- Payroll reconciliation
- Parallel payroll runs
- Leave balances (accruing and deducting)
- Vacation Buy Back
- Sick, accrual, taken balances

1.11.9   Change Management & Training
- Train The Trainer Training
- Job aids and quick-reference guides
- Adoption and readiness planning

1.11.10   Deliverables
- Configured Oracle Time and Labor, Absence Management, and Workforce Scheduling solutions
- Integration interfaces
- Test scripts and results
- Reports

- o Sick balance
- o Accrual Balance
- o Taken Balance
- o Vacation Accrual Balance
- Training materials and Configuration Notebook
- Production deployment
- Post-go-live support

2   Proposal Response Instructions

2.10 Vendor Eligibility Requirements
The reach and scope of this Time and Labor, Absence Management and Workforce Scheduling implementation is critical. Therefore, vendor responses must thoroughly address the business, technical, system, and project requirements listed in this RFP.

- Incomplete proposals may be declared non-responsive.
- If either CNB/CED or the vendor determines that there is a real or potential conflict of interest between CNB/CED and the vendor, the determining party will send a written notification of the conflict and proposed workaround. CNB/CED will review the workaround and inform the vendor if they are ineligible to participate.
- Vendors must have the experience and resources to design, manage, develop, and implement the Oracle Time and Labor, Absence Management and Workforce Scheduling implementation.

2.11 Contact Information for RFP Coordinator
Any questions and responses related to this proposal should be directed at Stephanie Shults, via clicking *here*.

2.11.1   *Prior to Intent to Respond*
Any questions the vendor has regarding this proposal prior to submitting an intent to respond should be submitted via email to the RFP Coordinator referenced in section 2.11.

2.11.2   *Post Notification of Intent to Respond (Clarification Questions)*
Vendors will submit a CNB/CED Microsoft Form that will inform the RFP Coordinator to post questions regarding RFP scope, technical and performance outcomes, business outcomes, deliverables, or any apparent ambiguities via clicking *here*.

- All questions will be reviewed, and if the information is not clearly provided, CNB/CED will issue an addendum to the RFP to all vendors.
- The deadlines for submitting questions and the response time for the answers are detailed in section 08.

2.12 Changes to the Request for Proposal
- Addenda are the only means of verifying, clarifying, or changing any of the information contained in this request for proposal.

- No employee or agent of CNB/CED other than the RFP Coordinator identified in section 2.2 is authorized to change the content of this proposal.

- Any oral communication will be considered unofficial and non-binding.

- Vendors should rely only on written statements issued by the RFP Coordinator.

2.13 Acknowledgement and Intent to Submit

CNB requests that all prospective vendors formally submit a notice of intent to respond to this RFP. Please click *here* to submit your Intent to Submit.

Notifications must be submitted to the RFP Coordinator by Thursday, February 18th, 2026. Only vendors that submit a response by this date will be eligible for final selection.

2.14 Submitting Proposal for Time & Labor, Absence Management, and Workforce Scheduling

To be considered, vendors must submit their completed RFP proposals via the designated submission link. Submissions sent through other methods will not be accepted. Click *here* to submit your proposal.

2.15 RFP Evaluation and Due Diligence Process

Upon receipt of the vendor responses, the CNB/CED Time and Labor, Absence Management and Workforce Scheduling team will evaluate the submitted proposals. The evaluation will include contacting the references provided by the vendor. Because the initial evaluation will be based on the written responses, please ensure responses are clear, concise, and complete. **Do not include unnecessary sales verbiage**.

All vendors who submit a proposal will be asked to do a presentation of their response to help further our decision-making abilities. Vendors will have the option to present onsite or online per their preference.

In reviewing and evaluating the cost estimates, CNB/CED reserves the right to utilize external counsel at all points throughout the selection process. CNB/CED will select the vendor that offers the greatest value at CNB/CED's sole discretion. The selected vendor(s) may or may not be the vendor(s) that offers the lowest price.

The evaluation team expects to present its findings and recommendations to senior executive councils between March 16th, 2026, and March 20th, 2026. CNB/CED will notify all vendors when the decision is made. Final due diligence will then be undertaken by both parties, prior to awarding or suspending the final contract.

2.16 Selection Criteria

Selection Criteria	Details	Scoring Weights
DevOps Capabilities	- How well does the vendor manage technology, business requirements, and Oracle Time and Labor, Absence Management and Workforce Scheduling (OTAS) to provide demonstrable business outcomes? - How well does the vendor manage business and IT resources to ensure that products and services align with business objectives? - What offerings are provided as part of the vendor's advisory, implementation, and post-deployment processes?	5%

Selection Criteria	Details	Scoring Weights
	• What are the vendor's capabilities to implement CNB/CED's business requirements effectively and efficiently in OTAS Cloud? • What level of Oracle certification expertise can the vendor provide in all workstreams? • What is the vendor's relationship with Oracle to manage CNB/CED's requests and proposals when OTAS Cloud is not performing as required?	
Industry and Process Expertise	• What is the vendor's level of expertise in finance, accounting, and regulatory reporting processes? • What is the vendor's experience and approach to redesigning Time and Labor, Absence Management and Workforce Scheduling processes for an OTAS Cloud implementation? • How does the vendor capture, maintain, and reference material and knowledge to deliver value within an OTAS Cloud implementation? • What is the vendor's access to industry-specific functional experts (with regional expertise)?	15%
Operational Excellence	• What are the vendor's capabilities to design, implement, and manage the necessary people, tools, and methodologies to deliver an OTAS Cloud implementation? • What are the vendor's investments in resources (locally, and regionally)? • How many technical resources does the vendor have that live and work in the USA? • What is the vendor's understanding of, experience with, and capability to deliver against standardized measures? • What tools, technology, methodology, and other assets does the vendor have to ensure operational and delivery excellence? • What is the vendor's ability to staff and provide resources with OTAS Cloud application experience (including certifications)? • Areas of consideration are: project management, scope management, change management, stakeholder alignment, and problem resolution	15%
Organizational Change Management	• What is the vendor's ability to manage the organizational change in job roles, technology, and processes that this transformation will require? • What investments, tools, methodologies, and resources does the vendor have to manage change? • What is the vendor's track record for implementing change management that provides true value-oriented organizational change (faster adoption, efficiency gains, etc.)?	5%
Updates Management	• What tools, methodologies, and resources does the vendor have to manage the monthly and quarterly updates OTAS provides so that they don't conflict with or break the changes CNB/CED will make? • How are improvements prioritized? • What are the processes, procedures, and service organizations the vendor uses to manage updates?	5%
Finance Product Expertise	• What is the vendor's ability to implement CNB/CED's reporting business requirements in OTAS Cloud? • What knowledge of Oracle Fusion ERP and HCM best practices and requirements does the vendor have that will ensure seamless integrations? • What knowledge of possible problems and workarounds to OTAS implementations does the vendor have? • What tools and methodologies does the vendor have to capture, maintain, and reference lessons learned about implementing OTAS?	45%

Selection Criteria	Details	Scoring Weights
	• What level of experience (examples) does the vendor have in implementing OTAS in multiple industries and locations? • How many certified OTAS and HCM experts will be part of the transformation effort?	
Technology Enablement	• What are the vendor's investments in technology, tools, reusable assets, research, and development to support enabling OTAS Cloud applications to meet business requirements? • What skills, assets, resources, and capabilities does the vendor have to design, develop, test, and implement OTAS Cloud with third-party system integration solutions, if needed? • Can the vendor provide examples of solutions delivered across multiple regions and industries?	10%
	Total Score	100%

2.17 RFP Timeline

The schedule for this RFP is provided on the following table. CNB/CED reserves the right to adjust this timeline, as necessary.

Milestone	Date
RFP issue date	01/29/2026
Deadline to submit questions in writing	02/11/2026
Deadline for CNB/CED to respond to in writing	02/17/2026
Deadline to provide written intent to respond	02/18/2026
RFP submission due	02/24/2026
Onsite Presentations	03/04/2026 – 03/11/2026

2.18 Pricing Model

The pricing model for the CNB/CED Time and Labor, Absence Management and Workforce Scheduling Implementation will be outcome-based.

During design phase work, payment will be made when mutually agreed-upon deliverables are accepted and approved by CNB/CED.

During implementation phases, payment will be made when mutually agreed-upon deliverables and business outcomes are met. Examples of business outcomes may be completion of SIT round, completion of UAT round, approval and acceptance of reports, approval and acceptance of integrations, and approval and acceptance of conversions.

The "Bid Sheet" workbook should be submitted with your bid. Please provide both Fixed Price and Time & Material Price which are outlined in the tabs of the workbook.

The deliverables and business outcomes that define the payment structure will be defined during the final due diligence phase prior to contract signing. Invoices should be in AIA format that is agreed upon at the beginning of the implementation phase.

2.19 RFP Response Structure
This section describes the format, structure, and components for vendor responses.

2.19.3 Cover Page
A proposal cover page that lists the date and the name of the vendor responding to the request for proposal.

2.19.4 Table of Contents
A table of contents shall be provided in the proposal that identifies the sections required in the request for proposal.

2.19.5 Executive Summary
A short summary (one to two pages maximum) highlighting the strengths of the vendor's proposal. The summary should include why the vendor can perform the required services. The vendor should also confirm that they are willing to provide those services and enter into a contract with CNB/CED.

2.19.6 Proposal Response Summary
The vendor should provide demonstrable qualitative and/or quantitative capabilities for the key categories in the table below. Refer to section 2.167 for example, evaluation questions the team is looking to have answered for each of these categories. Provide any additional value-added information that may be applicable.

Selection Criteria	Details
DevOps Capabilities	The vendor should demonstrate how they harmonize technology and business, respond to changes in business dynamics, and enable OTAS Cloud to achieve CNB/CED's business outcomes.
Industry and Process Expertise	The vendor should demonstrate how their focus on business process excellence, reengineering, simplification, and standardization enables their clients to quickly adopt OTAS Cloud application to achieve their process outcomes. The vendor should demonstrate how they collect, store, and refer to intellectual capital to drive local and regional solutions for CNB/CED's various industries.
Operational Excellence	Vendors should demonstrate how they use people, tools, and methodologies to deliver OTAS Cloud solutions that satisfy business requirements. Vendors should demonstrate a track record of effective time management while meeting all deliverables.
Organizational Change Management	Vendors should demonstrate their ability to manage change (organizational and process) for a large organization.
Updates Management	Vendors should demonstrate processes, tools, assets, and best practices for managing Oracle's monthly and quarterly updates so that CNB/CED continuously realizes value, not downtime or extensive technical debt.
Finance Product Expertise	Vendors should demonstrate a deep understanding of the processes, features, and functions of Oracle Cloud, specifically OTAS, and HCM.
Technology Enablement	Vendors should demonstrate extensive experience and skills implementing and supporting OTAS Cloud Applications, developing PaaS extensions, and integrations that deliver on business outcomes.

2.19.7 Vendor Profile and Experience
Provide the following information in this section in the "Bid Sheet" workbook.

- Vendor name

- Name, title, address, telephone number, and email address of each person authorized by the vendor to contractually obligate the vendor

- Name, address, telephone number and email address of the contact person for technical and contractual clarifications throughout the RFP evaluation period

- Provide at least three references of customers who are either currently or have completed an OTAS transformation: include company name, contact person, email address, and telephone number, and a brief summary of work performed.

- Provide an overview of the vendor's cultural and core values

- Provide an overview of the vendor's experience with transforming a Time and Labor, Absence Management and Scheduling platform (Kronos, preferred) to Oracle Time and Labor, Absence Management and Workforce Scheduling Cloud

- Provide an overview of the vendor's experience with OTAS mobile application and non-standard Paid Time Off (PTO) policies.

- Provide information on vendor strengths, key differentiators, and alignment with Oracle service, support, and development resources

- Provide an overview of the vendor's financial strength (include the most recent financial report)

- Provide the annual turnover rate of team members with aligned skills for an Oracle OTAS implementation

- Provide a list of subcontractors that vendors will potentially use to provide services to deliver the business requirements described in this RFP.

- How many successful implementations?

- What is typical project timeline for successful implementation?

- Describe your escalation procedures

- Describe your service level commitments

- Describe your post go-live support

Note: Answers should be entered into the Vendors Questions tab found in the "Bid Sheet" workbook.

2.19.8   Resources, Pricing, and Timeline

Regardless of the number of proposed phases, information related to the initial design phase work (phase 1) must be distinct and separate from any other development or implementation work.

- Provide the total cost for the entire transformation effort

- Provide the total cost for each proposed phase of the project

    o Ensure that Phase 1 and Phase 2+ are detailed and separate.

- Provide proposed outcome-based pricing model based on deliverables and/or business outcomes for each phase of the project (refer to section 2.9)

- Include a list of anticipated resources (role-based) that the vendor will provide
  - No offshore resources will be utilized
- Include a list of anticipated resources (business and IT roles) that CNB/CED will need to provide
- Provide project team (workstream) roles and responsibility details (indicate vendor versus CNB/CED resources) – include a full responsible, accountable, consulted, informed (RACI) chart with separate definition of all roles
- Provide a CNB/CED and vendor team participation expectation and ratio for each proposed phase of the transformation
  - For each proposed phase of the implementation, provide a ratio graph showing the percentage of vendor resources versus the number of CNB/CED resources
  - Provide an anticipated vendor resource utilization percentage based on the information in following table for each proposed phase

Level	Utilization Percentage	Role Examples	Years in Role
L5		• Partner • Vice President • Project Executive	Over 15 years
L4		• Project Manager • Program Manager • Senior Manager • Enterprise Architect	10 to 15 years
L3		• Senior Consultant • Senior Programmer • System/Application Architect • Test Manager • Scrum Master • Business Analyst • Project Lead	5 to 10 years
L2		• Junior Functional Consultant • Junior Business Analyst • Junior Technical Consultant • Intermediate Programmer • Test Analyst	2 to 5 years
L1		• Trainee • Junior Programmer • Junior Analyst • Tester	0 to 2 years

Vendors must provide a proposed implementation timeline.

- Duration of each phase

- Description of key outcomes or deliverables for each phase

2.20 RFP Completion Notification

CNB/CED may suspend or award without advance notice to participants.

All vendors will be sent formal notification once the CNB/CED Time and Labor, Absence Management and Workforce Scheduling Implementation RFP have been awarded or suspended. CNB/CED is not under any obligation to disclose who was awarded. Once awarded, the decision is final.