Senior Business Intelligence-Data Warehouse Oracle EPM-Ascential ETL Developer

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R E Q U E S T F O R Q U O T A T I O N

State Term Schedule

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

Please consider this as the State of Ohio, Department of Administration, OAKS Business Office's Request for Quotation for the following consulting position:

Senior Business Intelligence-Data Warehouse Oracle EPM-Ascential ETL Developer

The Administrative Knowledge System (OAKS) is seeking quotations for professional IT service offerings for Senior Business Intelligence-Data Warehouse Oracle EPM-Ascential ETL Developer augmentation resource. The role is needed from **December 6, 2010 until March 31, 2011 for approximately 640 hours**.

BACKGROUND

OAKS is an enterprise system in Ohio's government which encompasses major business functions including capital improvements, financials, fixed assets, human resources and procurement. OAKS is an ERP system that supports all of these functions based on Oracle and PeopleSoft technologies (FIN 8.8, HCM 8.9, EPM 8.9/9.0).

The State of Ohio currently runs a broad scope of PeopleSoft applications known as the OAKS System. Currently installed PeopleSoft modules include: Finance (FIN) v8.8, Human Capital Management (HCM) v8.9, Enterprise Learning Management (ELM) v9.0, Customer Relationship Management (CRM) v.0, and two versions of Enterprise Performance Management (EPM) v8.9 and v9.0. The majority of support for these applications has been outsourced to Accenture as part of a 5-year managed services contract. Accenture provides both application maintenance and infrastructure support at sites located in Columbus and Cincinnati, Ohio.

The vendor resource selected for this project will work on production operations along with the OAKS Business Intelligence Implementation functional enhancements.

Key Role Responsibilities

- Provides expert technical systems advice & guidance to information technology professionals (e.g., FIN functional & tech teams, HCM functional & tech teams, data security team, technical architecture team, PS admin/database admin) regarding all facets of PeopleSoft FIN (Fin 8.8) and PeopleSoft HCM (HCM 8.9) operations in support of OAKS Business Intelligence system (PeopleSoft EPM 8.9/9.0 and Ascential Datastage 7.5.2).
- Participates in multi-organizational, multi-disciplinary teams to determine, articulate, & codify business requirements; models/designs and is responsible for Extract, Transformation & Loading (ETL) design and development, & work with ORACLE database

(10g RAC) & networking staff, to establish & maintain the OAKS EPM business intelligence application-infrastructure (EPM 8.9 and 9.0).

- Is responsible for enhancing PeopleSoft's 'Delivered' BI Suite (EPM 8.9 / 9.0 with Ascential Datastage ETL server 7.5.2).
    - Move to a business content focused, iterative BI development (monthly releases).
    - Provide an agency driven, best practice based framework for intelligent reporting, trend analysis and pro-active decision making.
    - Provide a standardized method for BI reporting.
    - Make reporting accessible and simple for the business users in all State agencies.
- Design and development of ETLs in data warehouse (with Ascential Datastage 7.5.2 and PeopleSoft EPM 8.9 & 9.0 data warehouse with PT 8.46 & 8.50) environment.
- Analyzes & designs components of Ohio Administrative Knowledge System (e.g., OAKS EPM running on PeopleSoft application): conducts facilitated discussions with customers to review current & gather additional business requirements; analyzes & writes business requirements, scope documents, program specifications & system documentation.
- Performs systems analysis, systems architecture & design and assistance to data warehouse& report developers; maintains system design standards & procedures; analyzes system problems & creates-resolves Customer Relations Management (CRM) Help Desk cases.
- Analyzes, prioritizes, & resolves assigned CRM cases to appropriate party for action; contacts customers to gather information about system issues; coordinates issue resolution with technical & functional team members; tests solutions & performs quality control; contacts users to gather information on required accounts & their appropriate environment, roles, & tasks.
- Creates technical requests to create or modify user accounts; designs and document test procedures & tests system for validity & reliability; tests accounts for correct access; follows security procedures for new development to ensure data security & correct user access.
- Designs test procedures & tests system for validity & reliability; ensures logical & systematic conversion of customer requirements into total systems solutions that acknowledge scope, schedule & cost constraints; provides data analysis, data architecture & design assistance to functional/systems analysts, application developers & users.
- Creates and maintains logical & physical data models & data dictionaries; writes system requirements, general & detailed design documents; participates in management short & long-term planning & assists in agency-wide policy & program development as impacts automated systems.
- Creates & maintains Enterprise Data Warehouse architecture and guidelines.

- Performs other related duties as assigned: stays abreast of available reporting best practice methodologies and tools that may enhance the capabilities of the Enterprise Data Warehouse/OAKS Business Intelligence.
- Ensure that the OAKS Business Intelligence program goal with respect to Data Quality is met: "Provides consistent, reliable and integrated data for use in analytics". Own, create, maintain and execute SAS-70 audit process on a daily basis.

Key Role Requirements

Required

- A minimum of two (2) recent years of experience in ETL development (with Ascential Datastage 7.5.2 or higher) and system analysis. Multi-module experience preferred (e.g. EPM, HCM, FIN) and experience in PeopleSoft (EPM: 8.9/9.0, PeopleTools: 8.46 / 8.50) preferred.
- A minimum of two (2) years working with Oracle (Version: 10g preferred) as a database engine.
- Three (3) years experience with enterprise data warehouse architecture and/or design.
- Two (2) years of Dimensional Data Modeling, and Data Profiling experience for data warehouse development. EPM MDW experience preferred.
- Experience integrating disparate systems of record into conformed dimensions and fact tables.
- Excellent documentation and communication skills.
- UNIX (HP-UX preferred) experience.
- Strong performance tuning skills with ETLs on Ascential Datastage 7.5.2

ADMINISTRATIVE

PROPOSAL INQUIRIES

Vendors may make inquiries regarding this RFQ any time during the inquiry period listed on the RFQ cover sheet. The State may not respond to any improperly formatted inquiries. The State will try to respond to all inquiries within 24 hours, excluding weekends and State holidays. The State will not respond to any inquiries received after 8:00 am. on the inquiry period end date. The State may extend the proposal due date.

To make an inquiry, vendors must use the process outlined below.

- Access the State Procurement Web site at http://procure.ohio.gov/.
- From the Navigation Bar on the left, select "Find It Fast".
- Select "Doc/Bid/Schedule #" as the Type.
- Enter the RFQ number found on the first page of this RFQ (the RFQ number begins with "DAS").
- Click the "Find It Fast" button.
- On the document information page, click the "Submit Inquiry" button.

- On the document inquiry page, complete the required "Personal Information" section by providing:
    - First and last name of the prospective vendor's representative who is responsible for the inquiry;
    - Name of the prospective vendor;
    - Representative's business phone number, and
    - Representative's e-mail address.
- Type the inquiry in the space provided, including:
    - A reference to the relevant part of this RFQ;
    - The heading for the provision under question, and
    - The page number of the RFQ where the provision can be found.
    - Click the "Submit" button.

A vendor submitting an inquiry will receive an immediate acknowledgement that the State has received the inquiry as well as an e-mail acknowledging receipt. The vendor will not receive a personalized response to the question nor notification when the State has answered the question.

Vendors may view inquiries and responses on the State's Procurement Web site by using the "Find It Fast" feature described above and by clicking the "View Q & A" button on the document information page.

All questions must be submitted by 8:00 am on November 9, 2010. Questions submitted after this time will not receive a response from the state.

DUE DATES

All quotations are due by 1:00 pm, EST, on November 12, 2010. Any quotation received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late quotations will not be evaluated for award.

SCHEDULE OF EVENTS

All times are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Vendors	November 3, 2010
3. Questions from Vendors due	8:00 a.m., November 9, 2010
4. Responses to Vendors due	4:00 p.m., November 10, 2010
5. Proposal/Quotation Due Date	1:00 p.m., November 12, 2010
6. Target Date for Review of Proposal/Quotation	November 15, 2010
7. Interviews of Candidates, if needed	November 16-19, 2010
8. Anticipated decision and selection of Vendor	November 19, 2010
9. Anticipated commencement date of work	December 6, 2010

EVALUATION FACTORS FOR AWARD

EVALUATION

The following will be considered in determining the vendor to be selected for this engagement, according to a standardized scoring methodology:

- Relevant experience
- Relevant skill level
- Proposed contractor rate(s)

- The contractor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the contractor (e.g., Candidate is no longer employed by the Contractor, is deceased, etc.). Note: If a substitution situation occurs, the proposal will be re-evaluated. If the substitution gives the contractor an unfair advantage during the RFQ process, the proposal may be eliminated or the other vendors will also be given the chance to submit substitutions of personnel also.
- All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals that provided the requested information will be evaluated for at least the highest prioritized candidate. The proposals will be scored based on the criteria requested above. We reserve the option to interview the top candidates. Candidate substitutions between the proposal evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the contractor's proposal requesting a substitution will be denied at this stage and the proposal will be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received proposals will be asked to confirm their candidates, given a couple of days to provide replacements, and the entire process will start over.

TERM AND CONTRACT

The contract will be for **Time and Material** through State Term Schedule (STS) contract and must reflect or be lower than STS rates, and must use STS categories.

STATUS REPORTING

The contractor will provide weekly status reports to the State OIT. The contractor will be responsible for meeting all timelines designated by assigned Project manager. Weekly timesheets will be reviewed and signed by the OIT Project Manager. Invoices must be accompanied by timesheets and submitted monthly for payment.

NON-DISCLOSURE AGREEMENT

Both candidate and company will be required to sign a non-disclosure agreement which prevents disclosure of any data obtained while on the engagement which can be used to personally identify any parties at anytime either during or after the engagement.

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMITTAL

Each Vendor must submit three (3) complete, sealed and signed copies of its quotation and each quotation must be clearly marked "PeopleSoft Enterprise Portal Subject Matter Expert" on the outside of its envelope along with Vendors name.

Each proposal must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal. Quote should be good for a minimum of 45 days.

- Cover Letter – include contacts e-mail address and phone number
- MBE or EDGE Certification – if applicable
- State Term Schedule Number
- STS Labor Category Code
- Candidate Information:
    - Position References (3 minimum) - form
    - Candidate Resume
    - Additional candidate Information (optional) – vendor form
- Candidate Hourly Rate
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form

The State will not be liable for any costs incurred by any offeror in responding to this RFQ, even if the State does not award a contract through this process. The State may decide not to award a contract at the State's discretion. The State may reject late quotations regardless of the cause for the delay. The State may also reject any quotation that it believes is not in its interest to accept and may decide not to do business with any of the Vendors responding to this RFQ.

Quotations MUST be submitted to the State's Procurement Representative:

Mr. Ted Hampton, Fiscal Officer
30 East Broad Street, 39th Floor
Columbus, OH 43215

PROPRIETARY INFORMATION

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Vendor. Additionally, all quotations will be open to the public after the contract has been awarded.

The State may reject any Proposal if the Vendor takes exception to the terms and conditions of this RFQ.

WAIVER OF DEFECTS

The State has the right to waive any defects in any quotation or in the submission process followed by a Vendor. But the State will only do so if it believes that is in the State's interest and will not cause any material unfairness to other Vendors.

REJECTION OF QUOTATIONS

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept. The State will reject any Non-STS responses. In addition, the State may cancel this RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

EVALUATION OF QUOTATIONS

Clarifications and Corrections

During the evaluation process, the State may request clarifications from any Vendor under active consideration. It also may give any Vendor the opportunity to correct defects in its quotation. But the State will allow corrections only if they do not result in an unfair advantage for the Vendor and it is in the State’s best interest.

Requirements

This RFQ asks for responses and submissions from Vendors. While each criterion represents only a part of the total basis for a decision to award the contract to a Vendor, a failure by a Vendor to make a required submission or meet a requirement will normally result in a rejection of that Vendor's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

The evaluation process may consist of up to three distinct phases:

1. The procurement representative's initial review of all quotations for defects;
2. The evaluation committee's evaluation of the quotations; and
3. Interviews (optional).

Initial Review

The procurement representative normally will reject any incomplete or incorrectly formatted quotation, though the procurement representative may elect to waive any defects or allow a Vendor to submit a correction. If a late quotation is rejected, the procurement representative will not open or evaluate the late quotations. The procurement representative will forward all timely, complete, and properly formatted quotations to an evaluation committee, which the procurement representative will chair.

Committee Review of the Quotations

The State's review committee will evaluate and numerically score each quotation that the procurement representative has forwarded to it.

The evaluation will result in a point total being calculated for each quotation. Those Vendors submitting the highest-rated quotations may be scheduled for the next phase. The number of quotations forwarded to the next phase will be within the committee's discretion, but regardless of the number of quotations selected for the next phase, they will always be the highest rated quotations from this phase.

At any time during this phase, the State may ask a Vendor to correct, revise, or clarify any portions of its quotation.

The State will document all major decisions in writing and make these a part of the file along with the evaluation results for each quotation considered.

Once the technical merits of a quotation are considered, the costs of that quotation will be considered. But the State may also consider costs before evaluating the technical merits of the quotations by doing an initial review of costs to determine if any quotations should be rejected because of excessive cost. And the State may reconsider the excessiveness of any quotation's cost at any time in the evaluation process.

Interviews

The State may record any presentations, demonstrations and interviews.

Determination of Responsibility

The State may review the highest-ranking Vendors or its key team members to ensure that the Vendor is responsible. The Contract may not be awarded to a Vendor that is determined to be not responsible. The State's determination of a Vendor's responsibility may include the following factors: the Vendor's and its key team members' experience, past conduct on previous Contracts, past performance on previous Contracts, ability to execute this contract properly and management skill. The State will make such determination of responsibility based on the Vendor's quotation, reference evaluations and any other information the State requests or determines to be relevant.

Changing Candidates

The major criterion on which the State bases the award of the contract is the quality of the Vendor's candidate(s). Changing personnel after the award may be a basis for termination of the contract.

Contract Award Process

It is OIT's intention to award one contract under the scope of this RFQ and as based on the RFQ Calendar of Events schedule, so long as OIT determines that doing so is in the State's best interests and OIT has not otherwise changed the award date. Any award decision by OIT under

this RFQ is final. After OIT makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their proposals.

OIT anticipates making one award depending on program needs and the fit of the Proposer to the scope of this RFQ.

ATTACHMENT ONE

PERSONNEL PROFILE SUMMARY

CANDIDATE REFERENCES

Candidate's Name:

References. Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain why. The State may disqualify the Proposal if fewer than three references are given.

Client Company:	**Client Contact Name:**	**Client Contact Title:**	
Client Address:		**Client Contact Phone Number:**	
Project Name:		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year
Description of services provided that are in line with those to be provided as part of this Project: **Description of how client project size and complexity are similar to this project:**			

ATTACHMENT ONE

PERSONNEL PROFILE SUMMARY

CANDIDATE REFERENCES CONTINUED

Client Company:	**Client Contact Name:**	**Client Contact Title:**	
Client Address:		**Client Contact Phone Number:**	
Project Name:		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year
Description of services provided that are in line with those to be provided as part of this Project: **Description of how client project size and complexity are similar to this project:**			

Client Company:	**Client Contact Name:**	**Client Contact Title:**	
Client Address:		**Client Contact Phone Number:**	
Project Name:		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year

Description of services provided that are in line with those to be provided as part of this Project:

Description of how client project size and complexity are similar to this project: