

REQUEST FOR PROPOSALS (RFP)

RFP NUMBER: EDUD201311700

DATE ISSUED: December 4, 2012

ELIGIBILITY: STS (State Term Schedule) Vendors Only

The State of Ohio Department of Education is requesting Proposals for:

TITLE: OAKS Reporting Conversion from COGNOS to Business Intelligence (BI)

INQUIRY PERIOD BEGINS: December 4, 2012

INQUIRY PERIOD ENDS: December 12, 2012 8:00 A.M. Eastern

PROPOSAL DUE DATE: December 14, 2012 12:00 P.M. Eastern

PROPOSAL OPENING DATE: December 18, 2012

ESTIMATED AWARD DATE: December 21, 2012

Section 1: Background

Ohio Department of Education (ODE) is transitioning to the new OAKS Business Intelligence (BI) data architecture and is seeking a migration partner develop and document report standards, create and test new reports, train staff and provide technical assistance for a specified period to ensure the transition is successful.

Section 2: Objectives

Implement OAKS Business Intelligence (BI) report documentation standards; migrate existing financial and human resource reports from Cognos 8.9 to OAKS BI; customize OAKS BI Standard Reports to fit specific business requirements; conduct staff training to generate and use reports.

Section 3: Overview of the Scope of Work

1. Implement report documentation standards:

- (a) Create a template for Cognos report documentation
- (b) Create instructions for using the Cognos report

documentation template

(c) Provide individual training for three (3) ODE staff on the approved documentation process

2. Migrate reports from OAKS Cognos EPM 8.9-Legacy to OAKS Cognos BI Environment for Financial (FIN) and Human Resource (HCM) reporting, including:

- (a) Direct Migration of 10 financial and 5 Human Resource reports
 - (i) Migrate COGNOS reports to the BI environment
 - (ii) Ensure Report Queries are re-directed to BI data sources
 - (iii) Ensure Report Prompts are updated to utilize the BI data sources

- (b) Test all new BI reports for Data Accuracy and Completeness in consultation with a test team:
 - (i) Create report testing plan and submit to test team for review and approval
 - (ii) Perform Report tests and document results of tests
 - (iii) Identify Report issues/bugs and resolve issues/bugs
 - (iv) Repeat Testing process until successful completion
- (c) Training: Provide individual training for three (3) ODE fiscal staff on the basics of report migration and development skills utilized in the report migration work
- (3) Customize BI OAKS standard reports to fit the specific business requirements for Financial (FIN) and Human Resource (HCM) reporting:
 - (a) Review and document standard reports identifying reports that require business logic/usability modifications
 - (b) Customize 5 financial OAKS standard reports:
 - (i) Review existing reports
 - (ii) Modify Report filters as necessary
 - (c) Provide individual training for three (3) ODE staff on BI modification processes utilized in the report modification work
 - (4) Provide a minimum of 1 year technical support with response time and process as agreed upon, including a process for escalating service requests initiated by the Department.

Section 4: Contractor Qualifications

- * Understanding of data, structures, and reports in OAKS production systems and EPM data warehouse.
- * 5 Years experience in both OAKS ERP and the use of Cognos within EPM and the transaction system.
- * Experience developing complex OAKS BI reports for fiscal services and human resources.
- * Experience migrating complex OAKS reports from EPM 8.9-Legacy to the BI environment
- * Experience training designated user personnel to ensure appropriate transfer of OAKS application and reporting knowledge.

Section 5: Special Work Information

Physical presence at the Offices of the Department of Education, 25 South Front Street, Columbus, OH 43215 will be necessary to obtain access to the OAKS BI Data Warehouse.

Section 6: Inquiry

All questions regarding this RFQ should be submitted online only. Accordingly, the Department will post responses online so that interested vendors may access and share the same information. (Note: Inquiry function is not available after 8:00 A.M. Eastern on the specified closing date for inquiry. The system shuts down early to allow time to process responses.)

Section 7: Submission Information

Proposals must reference the RFQ number above and should be submitted:

Either by email to:

Name: Robert Boykins

Email Address: robert.boykins@education.ohio.gov

Please also email a copy to:

Name: Amadu Sankoh, Agency Procurement Officer

Email Address: Amadu.sankoh@ode.state.oh.us

OR by Regular mail to:

Name: Robert Boykins

Address: Ohio Department of Education

Office of Fiscal Services

25 S. Front St Columbus, OH 43215

Columbus, Ohio 43215

Please also mail a copy to:

Amadu Sankoh, Agency Procurement Officer

25 South Front Street, Mail Stop G

Columbus, OH 43215

Do Not Write Below this Line – Vendor Guidance Only

Proposal Format (For Vendor Response)

Signed Cover Letter (Required – as acceptance of all the terms of this RFP)

Work Plan (Required – Must Reference RFP Number on cover page)

Cost Summary (Required – Specify pricing for each deliverable per Work Plan)

Offeror Profile: (Optional, unless specifically required)

Staffing Plan for Work Plan in 3(A): (Optional, unless specifically required)

STANDARD AFFIRMATION AND DISCLOSURE FORM (Required)

EXECUTIVE ORDER 2011-12K

Governing the Expenditure of Public Funds on Offshore Services

All of the following provisions must be included in all invitations to bid, requests for proposals, state term schedules, multiple award contracts, requests for quotations, informal quotations, and statements of work. This information is to be submitted as part of the response to any of the procurement methods listed.

By the signature affixed hereto, the Contractor affirms, understands and will abide by the requirements of Executive Order 2011-12K. If awarded a contract, both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States.

The Contractor shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information may subject the Contractor to sanctions. If the Contractor will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

1. Principal location of business of Contractor:

(Address) (City, State, Zip)

Name/Principal location of business of subcontractor(s):

(Name) (Address, City, State, Zip)

(Name) (Address, City, State, Zip)

2. Location where services will be performed by Contractor:

(Address) (City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

(Name) (Address, City, State, Zip)

(Name) (Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

(Address) (Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by Sub-contractor(s):

(Name) (Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

Contractor also affirms, understands and agrees that Contractor and its subcontractors are under a duty to disclose to the State any change or shift in location of services performed by Contractor or its subcontractors before, during and after execution of any Contract with the State. Contractor agrees it shall so notify the State immediately of any such change or shift in location of its services. The State has the right to immediately terminate the contract, unless a duly signed waiver from the State has been attained by the Contractor to perform the services outside the United States.

On behalf of the Contractor, I acknowledge that I am duly authorized to execute this Affirmation and Disclosure form and have read and understand that this form is a part of any Contract that Contractor may enter into with the State and is incorporated therein.

By: _____
Contractor

Print Name: _____

Title: _____

Date: _____

OTHER IMPORTANT INFORMATION FOR VENDORS:

The State may reject any Proposals or unsolicited Proposal amendments that are received after the deadline. An offeror that mails its Proposal must allow for adequate mailing time to ensure its timely receipt. Offerors must also allow for potential delays due to increased security. The State may reject late Proposals regardless of the cause for the delay.

The State may reject any Proposal if the offeror takes exception to the terms and conditions of this RFP, fails to comply with the procedure for participating in the RFP process, or the offeror's Proposal fails to meet any requirement of this RFP. The State may also reject any Proposal that it believes is not in its interests to accept and may decide not to do business with any of the offerors responding to this RFP.

By submitting a Proposal, the offeror acknowledges that it has read this RFP, understands it, and agrees to be bound by its requirements. The State is not responsible for the accuracy of any information regarding this RFP that was gathered through a source different from the inquiry process described in this RFP.

The State will not be liable for any costs incurred by any offeror in responding to this RFP, even if the State does not award a contract through this process. The State may decide not to award a contract for the work. The State may also cancel this RFP and contract for the work through some other process or by issuing another RFP.

Ohio Revised Code (ORC) Section 9.24 prohibits the State from awarding a contract to any offeror(s) against whom the Auditor of State of Ohio has issued a finding for recovery if the finding for recovery is “unresolved” at the time of award. By submitting a proposal, the offeror warrants that it is not now, and will not become subject to an “unresolved” finding for recovery under ORC 9.24, prior to the award of any contract arising out of this RFP, without notifying the Agency of such finding.

The successful offeror(s) will be required to enter into a contract with the Ohio Department of Education upon reaching agreement on terms and conditions for such contract prior to providing any services to the Department. The provisions of such contract are not valid and enforceable until the availability of funds is certified by and approved by the Office of Budget and Management, in accordance with Chapters 126.07 and 131.33 of the Ohio Revised Code. The Department is not obligated to pay for services performed prior to such OBM certification.

All proposals and other materials submitted will become the property of the State and may be returned only at the option of the State. Proprietary information should not be included in a proposal or supporting materials because the State will have the right to use any materials or ideas submitted in any proposal without compensation to the offeror. Additionally, all proposals will be open to the public after a contract has been awarded. The State will retain all proposals, or copies of the proposals, as part of the contract file for at least three years. After the retention period, the State may return, destroy, or otherwise dispose of the proposals or copies of the same.
