

September 10. 2009

RFQ #820009

Due on Monday, September 28, 2009 at 4pm

County of Santa Barbara California

**COGNOS Business Intelligence (BI) and Performance
Management (PM) Application Development,
Maintenance, and Support
Request for Qualifications**

1. GENERAL INFORMATION

Santa Barbara County is requesting offers from qualified contractors to assist the County in the development, enhancement, maintenance, and support of the Data for Decision making technical environment, dashboards, and reports. These tasks are expected to include the identification of user needs, the development of logical data models, construction of data reporting repositories, extract, transform, and load software (ETL) using SSIS, and the development of online dashboards, queries and reports using the COGNOS Business Intelligence and Performance Management tools. Installation, testing and maintenance of COGNOS suite of products and version upgrades, training and knowledge-transfer, and documentation are also included.

The anticipated start of this agreement is October 19, 2009 and end date is June 30, 2010.

Contract Award is not to exceed \$65,000.

Multiple awards may be made.

2. BACKGROUND

Santa Barbara County is located approximately 100 miles northwest of Los Angeles and 300 miles south of San Francisco. It occupies 2,774 square miles, one-third of which is located in the Los Padres National Forest. Bordered on the west and south by the Pacific Ocean, the County has 110 miles of beaches, a little over half being south facing beaches. The County is well known for its mild climate, picturesque coastline, scenic mountains, and numerous parks and beaches. As of January 1, 2008, the estimated County population was 429,109. In addition, there are eight incorporated cities within the County including Buellton, Carpinteria, Goleta, Guadalupe, Lompoc, Santa Barbara, Santa Maria and Solvang.

In 2007, the County of Santa Barbara funded a Proof of Concept (POC) to consolidate useful decision-making data from disparate departmental systems into a data repository, designed for efficient reporting. This was done as part of the strategic initiative, Data for Decision Making. Specific deliverables included a database reporting repository, implemented in the MS SQL Server database management system; extract, transform, and load software using MS SQL Server Integrated Services (SSIS); and dashboards, reports, and queries using the COGNOS Business Intelligence software tools.

3. STATEMENT OF WORK

In support of the Data for Decision Making goals and objectives, develop, enhance, maintain, and support the software application components to provide useful data and management information for both internal and external decision-makers using MS SQL Server, MS SQL Server Integration Services (SSIS) and the COGNOS Business Intelligence and Performance Management tools. Also, prepare technical documentation and training materials and provide knowledge-transfer and training. Installation and maintenance of the COGNOS suite of products is included in the statement of work.

3.1 PROJECT GOALS

- Conduct requirements analysis, data analysis, data modeling, and logical and physical database design.

- Design, develop, enhance and support the extract, transform, and load software using SSIS.
- Design, develop, enhance and support the MS SQL database tables for the report repository.
- Design, develop, enhance and support Data for Decision Making queries, reports and dashboards using the COGNOS BI and PM software suite.
- Install, configure, test, and deploy the COGNOS suite of products.
- Recommend best practices for usage of the COGNOS tools.
- Provide knowledge transfer through documentation, training, and mentoring of County technical employees and clients. This includes the ETL processes; queries, dashboards, and reports; database structures, file directory structures and their uses; version upgrades, the COGNOS BI and PM reports and tools, and best practices.

3.2 DESCRIPTION OF SERVICES

Consulting services to assist in the development, enhancement, maintenance, and support of the Data for Decision Making environment using MS SQL Server, SSIS, and the COGNOS BI and PM software suites. Typical requests might include:

- Requirements
 - Identify and document business objectives
 - Identify and document functional and system requirements
 - Identify additional product usages and needs
- Define data requirements
 - Data Modeling
 - Design and implement desired logical data models and physical database using best design practices
 - Enhance and support existing data models and database tables
- Database design and Implementation
 - Design desired data repositories and implement in MS SQL Server
 - Create the metadata layers using the COGNOS Framework Manager and deploy to production environments after testing and approval
 - Load the data repositories using ETL processes, preferably in SSIS
- Develop, enhance, maintain and support queries, reports, and dashboards
 - Design, develop, enhance, modify, and support Data for Decision Making queries, reports and dashboards using the COGNOS suite of products.
- Install and maintain the COGNOS suite of products, including version upgrades
 - Review COGNOS version upgrade release notes and coordinate requirements with the County of Santa Barbara IT Department
 - Install, configure, test and maintain the COGNOS suite of products and version upgrades in the development and production environments
 - Deploy version upgrades to production after successful testing and authorization by the Data for Decision Making manager.

- Documentation and Training
 - Prepare written documentation
 - Review and update documentation with appropriate County personnel
 - Refine and finalize documentation
- Prepare training materials
- Conduct training and knowledge transfer

3.3 APPLICATION COMPONENTS

The following information indicates the general requirements, guidelines and expectations for each of the support components. They constitute a base standard of expectations for accuracy, content, etc. If the respondent alters any of these details as part of various alternate methods of implementation, please provide clear details describing benefits and detriments with respect to the task itself as well as the overall scope of the project. This RFQ offers the respondents the opportunity to offer alternatives with an explanation of their advantages.

Information Product Needs: The County currently has 75+ data repository tables that reside in three data repositories, implemented with a dimensionally modeled database design. We plan to expand content of these data repositories and add new data elements and repositories, as requested and prioritized by the Data for Decision Making Steering Committee.

Data Requirements: Identify data elements and datasets to support the required information products; identify the source for each.

Roles and Privileges: Recommend, design and implement roles and access permissions for County “data stewards”, COGNOS business authors, data consumers, and system administrators.

Data Security: Design, recommend, and implement database, file directory, and data element security to provide for authorized ad hoc access to the data repository that complies with Federal, State, and Local laws and mandates.

Data Model: Create logical data models that support County decision-making requirements, provides an intuitive database table structure utilizing standard database design methods. Transform the logical models into physical tables in MS SQL Server

Data Loading: Design, develop, test, and document processes to extract, transform, and load (ETL) data from disparate departmental systems that is automated to the greatest degree possible. Usage of processes similar to existing software component design and implementation using SSIS is desired.

Metadata: Create the COGNOS metadata layer using COGNOS Framework Manager and publish in the proper technical environments.

Dashboards, queries, and reports: Design, develop, test, and implement decision-making dashboards, queries, and reports, assuring accuracy of the data content.

Documentation and training: Prepare technical documentation and conduct knowledge-transfer with County technical employees for all enhanced and new products.

Prepare training materials and user guides in the use of new dashboards, reports, and queries and for usage of the COGNOS tools.

COGNOS suite of products installation, maintenance, and support: Review release notes for version upgrades and make recommendations to County IT management for version upgrade installations, configurations, and deployments. Also, carry out the required tasks to install, maintain, and support the COGNOS suite of products, including completion of version upgrade installations.

3.4 ADDITIONAL CONSIDERATIONS

The respondent is invited to offer any other considerations for the implementation of the project; to identify items or processes that may fit into the larger scope of work that might make this a better, more achievable effort.

Quality Control/Assurance Please include a detailed description of all quality control and assurance methods for all of these components.

Software Santa Barbara County uses the COGNOS Business Intelligence software products that include the COGNOS Connection Portal, Query Studio, Report Studio, Analysis Studio, Metric Studio, Metric Designer, and Event Studio modules and functionality. The County also uses the COGNOS Framework Manager, Map Manager and administrative tools to administer the Data for Decision Making environment. The County also purchased the COGNOS Performance Management software and desires to leverage the investment. Please include a detailed description of your company's use of these tools that includes the level of contractor certification, training, and years of COGNOS experience. Also provide a statement on your company's certification to conduct formal COGNOS training. Finally, please state the number of years of experience in database design and development.

SUBMISSION INFORMATION & INSTRUCTIONS

Submission Location:

Santa Barbara County
John McMillin, County Purchasing Department
105 E. Anapamu, Suite 304
Santa Barbara, CA 93101-2070

Contact Person: Gail Johnson, Data for Decision Making Manager (805) 884-6808

Due Date: 4:00 p.m. September 28, 2009

Schedule of Events: (Dates are subject to change)

September 10, 2009 RFQ Release
September 22, 2009 Questions from Responders Due
September 28, 2009 Proposal Due Date
October 16, 2009 Select Vendor

3.5 SUBMITTAL PACKAGES

The following items must be included in the all proposals submitted. Please submit 3 hard copies and 1 electronic copy.

Cover Letter

The cover letter must include the title of this RFQ as well as the contractor's:

- Company Name, Address, Phone Number, Fax Number
- Contact Name, Phone Number, E-mail Address
- Pricing Structure and skills/job descriptions for each rate
- Signature of individual authorized to enter into contracts for the contractor

Company References

Provide two (3) customer references for projects of a similar nature and size successfully completed within the last three years. Provide the information as shown on Attachment A: *Company References*. The reference information for the company must include the following:

- Client Name
- Project Name
- Customer Contact – including e-mail address and phone number
- Contract Amount
- Company Providing the Service
- Contract Duration
- Relevance to this Project
- Project Scope and Tasks
- Customer Service Quality

If the responding team has performed work together in the past, please include references for those clients as well.

Project Team

Provide a resume of relevant experience for each member of the proposed team including experience, education, and certifications. There is also a requirement for training in state and federal laws such as HIPAA and CMIA due to the sensitive nature of some of the data and desired reports. Describe each member's role and responsibilities on this initiative as well as any COGNOS or professional certifications.

Understanding and Description of the Tasks to be Performed

Include a description of your understanding of the scope of work, emphasizing your understanding of the County's objectives and the major activities that must be performed to complete the work. Describe the activities you will perform to complete the required work. Include your expectations of all entities outside your own team.

Methods and Tools

Describe the methods, tools and standards that will be used to complete the tasks.

Assumptions

Provide the assumptions used to develop the response.

Timeline

Santa Barbara County would like to expand the Data for Decision Making environment as quickly as possible.

Cost

Please provide your pricing structure/rate(s) and any skills/job descriptions for each price.

Work Sample (Optional)

If the responder chooses to provide an illustrative work sample from a similar engagement, it should be no more than ten (10) pages. The objective should be to provide a sample that illustrates performance of similar work. A brief explanation (not more than one page) explaining the rationale for selection should accompany the sample.

4. TERMS AND CONDITIONS

Definition

Request for Qualifications (RFQ) is a method of procurement permitting discussions with responsible vendors prior to award of a contract. The award will be based on the criteria set forth herein.

Evaluation of Qualifications

The qualifications submitted shall be evaluated solely in accordance with the criteria set forth in this document.

Discussion of Qualifications

Santa Barbara County may conduct discussions with any respondent who submits an acceptable or potentially acceptable set of qualifications. Vendors shall be accorded fair and equal treatment with respect to any opportunity for discussion of qualifications. During the course of such discussions, Santa Barbara County shall not disclose any information derived from one set of qualifications to any other vendor. All vendors are advised that in the event of receipt of an adequate number of qualifications, which in the opinion of Santa Barbara County require no clarification and/or supplementary information, such qualifications may be evaluated without further discussion. Hence, qualifications should be initially submitted based on the most complete and favorable terms which vendors are capable of offering to the County.

Negotiations

Santa Barbara County reserves the right to negotiate specifications, terms and conditions, which may be necessary or appropriate to the accomplishment of the purpose of this RFQ. Santa Barbara County may require the RFQ and the respondents' qualifications be incorporated in full or in part as Contract Documents. This implies that this RFQ and all responses, supplemental information, and other submissions provided by the vendor during discussions or negotiations may be held by Santa Barbara County as contractually binding on the successful vendor.

Confidentiality

Santa Barbara County shall examine the qualifications to determine the validity of any written requests for nondisclosure of trade secrets and other proprietary data identified. After award of the contract, all responses, documents, and materials submitted by the respondent pertaining to this RFQ will be considered public information and will be made available for inspection, unless otherwise determined by Santa Barbara County. All data, documentation and innovations developed as a result of these contractual services shall become the property of the County of Santa Barbara. Based upon the public nature of this RFQ, a respondent must inform Santa Barbara County, in writing, of the exact materials in the offer that cannot be made a part of the public record.

Authority

This RFQ is issued pursuant to applicable provisions of the County of Santa Barbara.

Error in Qualifications

Respondents are cautioned to verify their qualifications prior to submission. Negligence on the part of the vendor in preparing the qualifications confers no right for withdrawal or modification of the qualifications.

Reserved Rights

Santa Barbara County reserves the right at any time and for any reason to cancel this RFQ, to reject any or all qualifications, or to accept an alternate set of qualifications. Santa Barbara County reserves the right to waive any immaterial defect in any set of qualifications. Santa Barbara County may require submission of best and final offers.

Exclusion from Consideration

Any proposal received after the submission time and date may be rejected and returned to sender unopened. Santa Barbara County does not prescribe the method by which the proposal is transmitted, therefore, it cannot be held responsible for any delay or excessive damage, regardless of reason, in the transmission of qualifications. Santa Barbara County reserves the right to reject any and/or all proposals either in part or in their entirety and to waive any minor irregularities.

Incurred Costs

Santa Barbara County will not be liable in any way for any costs incurred by respondents in replying to this RFQ.

Award

Upon agreement by all negotiating parties, award shall be made to the responsible vendor(s) whose proposals are determined to be the most advantageous to the County, taking into consideration negotiated price and approach, and the evaluation criteria set forth herein.

Evaluation Criteria

All qualifications submitted in response to this RFQ will be evaluated based on the following criteria:

- Compliance with RFQ: This refers to the adherence to all conditions and requirements of the RFQ.

- Suitability of the Respondent: Prior experience, certifications, types of references, years in operation, proximity to Santa Barbara County, primary services provided by firms/teams, etc., will be considered.
- Understanding of County's Needs: This refers to the level of understanding of the specific requirements of Santa Barbara County demonstrated throughout the proposal.
- Clarity of Explanations: The degree to which the respondent articulates clear, concise, accurate and meaningful explanations of technical details and methodologies will have significant impact on evaluation.
- References: References will be contacted. Respondents should contact references prior to submittal deadline and inform them that we may contact them after submittal deadline. Respondent's capability in all respects to fully perform the contract requirements, and the tenacity, perseverance, experience, integrity, reliability, facilities, equipment, and credit which will assure good faith performance will be investigated. The County will also inquire about value of performance.
- Price and affordability

Evaluation

The evaluation of qualifications will be completed by the Data for Decision Making Manager and other Santa Barbara County staff.

Attachment A: Company References

Client Name:	
Project Name:	
Contact:	
Contract Amount:	
Company Providing Service:	
Contract Duration:	
Relevance to this Project:	
Project Scope and Tasks	