

# **IT Professional Technical Services Master Contract Program T#:902TS**

## **Statement of Work (SOW) For Technology Services**

MN.IT Services @ MMB

**Project Title: Oracle/PeopleSoft EPM  
Project Assistance (Planning and Expert Staff Augmentation)**

**Service Category: Analyst – Technical**

### **Business Need**

The SWIFT (Statewide Integrated Financial Tools) Data Warehouse currently makes selected data available to users from the State's Financial and Human Resources/Payroll Systems. It serves all state agencies in the executive and judicial branches, as well as part of the legislative branch. Minnesota Management and Budget (MMB) manage and provide support for the SWIFT Data Warehouse. MN.IT services provide all technical staff and technology resources to the SWIFT Data Warehouse through the divisions of MN.IT services @ MMB and MN.IT services @ central.

The SWIFT Data Warehouse is customized software based on Oracle/Enterprise Performance Management (EPM) software. In 2011, the State implemented Oracle/PeopleSoft Financials and Supply Chain Management software along with a portion of the Enterprise Performance Management (EPM) Data Warehouse software. The first module to be opened in October 2011 was the Labor Distribution/Salary Projection module followed by General Ledger, Commitment Control, Accounts Payable and Accounts Receivable. Underway are plans to implement a Citizen's Portal, Grants & Projects, Procurement, Inventory and Strategic Sourcing modules. All implemented modules have required significant customization and new development. It is expected that future modules will also require significant modification and new development.

Our objective with this Statement of Work is to obtain contractor staff augmentation and specific expertise regarding the State's use of Procurement and Strategic Sourcing as implemented in SWIFT that is needed to expedite the planning, design and implementation of the Procurement and Strategic Sourcing modules for the SWIFT Data Warehouse.

We have developed expertise in the Data Warehousing application and have successfully implemented modules. We believe a vendor could supplement State staff by supplying a consultant with business process and data expertise in Oracle/PeopleSoft Financials and Supply Chain Management. We are seeking a vendor to provide this important information about the implementation of Oracle/PeopleSoft Financials and Supply Chain Management and guidance to help us make good decisions regarding implementing Procurement and Strategic Sourcing modules in the SWIFT Data Warehouse.

## **Project Deliverables**

The successful vendor will augment state SWIFT Data Warehouse staff to complete design, development and testing tasks as assigned, by supplying a consultant with business process and data expertise in Oracle/PeopleSoft Financials and Supply Chain Management.

## **Project Milestones and Schedule**

- Vendor start date is as soon as available. State anticipates that this project will begin in January 2014 and end by June 30, 2014.

The term of any resulting work order will be limited to a term not greater than one-year from the date of final execution anticipating the completion of the existing master contract. The State reserves the right to transition any resulting work order to the new master contract program subject to its terms and conditions which will replace the current program. If such a transition is not possible, the contracting entity will work with MN.IT and the Department of Administration to review options to enable the continuation of the services being provided to the extent possible.

## **Project Environment (State Resources)**

- Staff resource descriptions:
  - a) State has 9 technical developer staff assigned to support and enhance the SWIFT Data Warehouse. State expects the majority of these staff to be engaged in the project.
  - b) State has a team of infrastructure PeopleSoft systems administrators and database staff assigned to all Oracle/PeopleSoft statewide systems.
  - c) State is operating production systems on Exadata platform. Three non-Exadata development environments exist to support the SWIFT Data Warehouse.
- Current software environment:
  - a) Oracle Enterprise Management System version 9.0.
  - b) DataStage version 8.5.
  - c) OBIEE version 11.1.1.6.7
  - d) PeopleTools 8.53 will be in place for the SWIFT Data Warehouse.
  - e) Oracle database software version is 11gR2 and utilizes Oracle RAC.
  - f) Oracle database server is Oracle Exadata system.
  - g) Application, batch and web servers are Windows 2008R2 systems.

## **Agency Project Requirements**

- Work on production and test servers will be performed at Minnesota Management and Budget located at:  
658 Cedar St.  
St. Paul, MN 55155

## **Responsibilities Expected of the Selected Vendor**

- Staff augmentation working under the direction of the State's Data Warehouse Director.
- Project Documentation
- Providing training/ knowledge transfer

## **Required Skills (to be scored as pass/fail)**

Required minimum qualifications:

- Required minimum qualifications of proposed consultant include three years' experience configuring, analyzing, developing and implementing the Procurement and Strategic Sourcing modules in Oracle/PeopleSoft FSCM.

## Process Schedule

- Deadline for Questions December 20, 2013, 2:00 PM CT
- Anticipated Posted Response to Questions December 23, 2013, 4:00 PM CT
- Proposals due December 26, 2013, 2:00 PM CT
- Anticipated proposal evaluation & decision January 3, 2014, 4:00 PM CT
- Anticipated start date January 13, 2014 or as agreed to

## Questions

Any questions regarding this Statement of Work should be submitted via e-mail according to the date and time listed in the process schedule to:

Ellen Schwandt, State Data Warehouse Director  
[Ellen.Schwandt@state.mn.us](mailto:Ellen.Schwandt@state.mn.us)

Questions and answers will be posted on the Office of MN.IT Services website ([http://mn.gov/buyit/statements/mcp902ts\\_active.html](http://mn.gov/buyit/statements/mcp902ts_active.html)) according to the process schedule above.

Other persons ARE NOT authorized to discuss this SOW or its requirements with anyone throughout the selection process and responders should not rely on information obtained from non-authorized individuals. If it is discovered a Responder contacted other State staff other than the individual above, the responder's proposal may be removed from further consideration.

The STATE reserves the right to determine if further information is needed to better understand the information presented. This may include a request for a presentation.

## SOW Evaluation Process

State will read all responses to verify minimum requirements have been met as described in Response Requirements below.

State will review and score responses based on Experience in areas of Required Skills and the Cost Proposal.

The vendor should provide resumes for the actual consultant available to complete this assignment. As part of the response, the vendor should provide the availability of the consultant knowing the State's desire to start this project in December 2013.

For the cost proposal, please be aware that for this engagement, the state will not pay for travel or per diem expenses. The vendor should provide hourly rates that include all costs the vendor intends to recover. The proposal should include hourly rates for the consultant specified above assuming the consultant will be part of the project team for nine months, although the State may choose to reduce the involvement to less than the full project period.

The scoring (possible points) will be as follows:

- Experience: 60%
- Cost: 40%

State will read all responses to verify minimum requirements have been met as described in Response Requirements below.

**This Statement of Work does not obligate the state to award a work order or complete the assignment, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest. The Agency reserves the right to reject any and all proposals.**

## Submission Format

The proposal should be assembled as follows:

### Cover Page:

Vendor Name  
Vendor Address  
Vendor City, State, Zip  
Contact Name for Vendor  
Contact's direct phone/cell phone (if applicable)  
Contact's email  
Resource Name being submitted

### Overall Experience:

1. Provide narrative, including companies and contacts where your resource has demonstrated the required skills as previously noted. If pass/fail requirements are not met, the State reserves the right to discontinue further scoring of the proposal.
  2. Points will also be awarded based on the qualifications noted above. Provide one paragraph which highlights the resource's desired skills noted above.
  3. Attach a resume(s) for proposed resource(s) in addition to the narrative description. Be certain the resume has dates of work and notes whether the resource was an employee or consultant.
  4. Also include the name of [ONE] reference who can speak to the resources work on a similar project. Include the company name and address, reference name, reference email, reference phone number and a brief description of the project this resource completed.
- Conflict of interest statement as it relates to this project
  - Required forms to be returned or additional provisions that must be included in proposal
    - a) Affirmative Action Certificate of Compliance (if over \$100,000)  
<http://www.mmd.admin.state.mn.us/doc/affaction.doc>
    - b) Affidavit of non-collusion  
<http://www.mmd.admin.state.mn.us/doc/noncollusion.doc>
    - c) Certification Regarding Lobbying (if over \$100,000)  
<http://www.mmd.admin.state.mn.us/doc/lobbying.doc>
    - d) Veteran-Owned/Service Disabled Veteran-Owned Preference Form (if applicable)  
<http://www.mmd.admin.state.mn.us/doc/vetpref.doc>
    - e) Resident Vendor Form (if applicable)  
<http://www.mmd.admin.state.mn.us/doc/residentvendorform.doc>

## Proposal Submission Instructions

Responses must be received no later than December 10, 2013, 2:00 p.m. Central Standard Time (CST) and must be submitted via email to MN.IT\_Contracts@state.mn.us (Please note there is an underscore between MN.IT and the word Contracts.) (Subject Line of the email: SOW Response – Oracle/ PeopleSoft EPM). Responses sent to any other email address will not be considered.

**It is the Responders sole responsibility to ensure that their submittal is received at the MN.IT\_Contracts@state.mn.us email address by the response deadline. Responses received after the deadline will not be considered, regardless of any documentation showing when the response email was sent** Proposals will be evaluated on “best value” as specified below.

### Cost of preparing and submitting proposals

Vendors are responsible for all costs associated with the preparation and submission of a proposal. The State shall not bear any vendor costs related to the SOW, including negotiation costs incurred by the successful vendor.

## **Communications restrictions**

Vendors must not communicate with any State employees or persons under contract with the State, concerning this SOW, except as provided for in this section. **Any attempt to make an unauthorized communication may result in the rejection of vendor's proposal**

## **General Requirements**

### **Proposal Contents**

By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

### **Liability**

#### **Indemnification**

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

### **Disposition of Responses**

All materials submitted in response to this SOW will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Responder submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this SOW, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

### **Conflicts of Interest**

Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational

conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage. The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

### **IT Accessibility Standards**

All documents and other work products delivered by the vendor must be accessible in order to conform with the State Accessibility Standard. Information about the Standard can be found at: <http://mn.gov/oet/policies-and-standards/accessibility/>.

### **Preference to Targeted Group and Economically Disadvantaged Business and Individuals**

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at [mmdhelp.line@state.mn.us](mailto:mmdhelp.line@state.mn.us). For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

### **Veteran-Owned Preference**

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference on state procurement to **certified small businesses** that are **majority-owned and operated by**:

- (1) recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;
- (2) veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or
- (3) any other veteran-owned small businesses certified under section [16C.19](#), paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a

service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time.

If you are claiming the veteran-owned preference, **attach documentation, sign and return the Veteran-Owned Preference Form with your response to the solicitation.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.