MICHIGAN DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET
IT SERVICES
for
DATA WAREHOUSE (DW) AND BUSINESS INTELLIGENCE (BI)
STATEMENT OF WORK (SOW) TEMPLATE

Business Intelligence (BI) Work Request

The data warehouse is maintained and hosted by DTMB and currently supports multiple agencies, including the Michigan Department of Community Health (DCH), the Michigan Department of Human Services (DHS), the Michigan Department of Treasury (Treasury), the Michigan Department of Energy, Labor and Economic Growth (DELEG) and the State Courts Administrative Office (SCAO). Additional agencies may be supported in the future. The State of Michigan wishes to continue to host and administer any replacement systems with existing State staff in existing State facilities.

BI services will be provided in a three-tier fashion. The primary support for an agency’s BI needs will come from its associated DTMB Agency Services team. Where this is not possible, due either to lack of skills or resource shortages, the Center for Shared Solutions and Technology Partnerships (CSSTP) will provide the needed support. However, the State’s need is such that these two groups cannot serve all of its BI needs. In that case, CSSTP will Contract with a pre-qualified BI service Contractor to provide appropriate support. That support may come in the form of staff augmentation where Contractor staff works side by side with DTMB staff under the direction of a DTMB supervisor. It may also be provided as a staff augmentation to an existing CSSTP team. DTMB may choose to Contract with the pre-qualified BI service Contractor through CSSTP to develop a BI application or system with DTMB and Agency oversight for delivery to the State. In that case the BI Contractor must be able to provide knowledge transfer to State staff sufficient to maintain and extend the application.

A Pre-Qualification Program was developed to provide a mechanism for staff augmentation and project development support of the data warehouse and related application development.

Process for obtaining Business Intelligence Services
The State after formalizing a comprehensive Work Request will facilitate a second tier selection process for each Contracting effort. This BI Work Request template will identify the statement of work, category of service, period of performance, deliverables, specific response information required, work evaluation and payment criteria, and any special terms and conditions.

Awards made as a result of any formal Work Request for BI Services will be subject to the Terms and Conditions of the Primary Contracts listed above. Each award will be issued as a change notice to the applicable Primary Contract.

Purchase Request Form Instructions
This is a Data Warehouse and Business Intelligence ITB. Only the pre-qualified Contractors listed below may submit proposals.

<table>
<thead>
<tr>
<th>Contractor Name</th>
<th>City</th>
<th>State</th>
<th>Contract Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cognizant Technology Solutions US corporation</td>
<td>Teaneck</td>
<td>NJ</td>
<td>071B1300136</td>
</tr>
<tr>
<td>Information Builders</td>
<td>New York</td>
<td>NY</td>
<td>071B1300137</td>
</tr>
<tr>
<td>Optum Government Solutions, Inc.</td>
<td>Lansing</td>
<td>MI</td>
<td>071B1300138</td>
</tr>
</tbody>
</table>
**Reminder:** The following are requirements for Data Warehouse and Business Intelligence proposals:

- Contractors are limited to One (1) candidate per position
- Candidates MUST meet the minimum requirements of the position
- Two copies of each resume MUST be submitted (labeled Copy 1 & Copy 2)
- All resumes submitted must be sent “blind” (not on company letterhead and without logos or identifying company marks)
- Rate proposal must be submitted according to instructions in the Information Required from Contractors Section, Rate Proposal.

Failure to adhere to any of the above requirements may result in the contractor being disqualified.

This request is issued under your Contract with the Michigan Department of Technology, Management and Budget, Procurement, as established under the Data Warehouse and Business Intelligence Program.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>City</th>
<th>State</th>
<th>Project ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MiPro Consulting, LLC</td>
<td>Milford</td>
<td>MI</td>
<td>071B1300140</td>
</tr>
<tr>
<td>Sogeti USA LLC</td>
<td>Farmington Hills</td>
<td>MI</td>
<td>071B1300141</td>
</tr>
<tr>
<td>Systems Technology Group, Inc</td>
<td>Troy</td>
<td>MI</td>
<td>071B1300142</td>
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<td>TEK Systems</td>
<td>Hanover</td>
<td>MD</td>
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</tr>
<tr>
<td>Thomson Reuters (Healthcare) Inc</td>
<td>Ann Arbor</td>
<td>MI</td>
<td>071B1300144</td>
</tr>
<tr>
<td>Mahindra Satyam Computer Services</td>
<td>Parsippany</td>
<td>NJ</td>
<td>071B1300139</td>
</tr>
</tbody>
</table>

**Project Title:**
Enterprise Data Warehouse Developer for ETL

**Required Skill Category Requested:**
One (1) Data Warehouse Developer

**Brief Description of Services to be provided:**
CSSTP supports many of the State of Michigan’s Business Intelligence (BI) environments. To maintain our level of service to other State of Michigan Agencies, CSSTP requires an Enterprise Data Warehouse Developer for the CSSTP’s extract, transform and load (ETL) service. This position will perform application development tasks in support of building business intelligence applications and integrating data warehouse resources into other Agency applications. Specifically, this position will design, develop, test and implement ETL jobs using the IBM DataStage/QualityStage products. Additionally, this position will provide ETL expertise to other application developers in close collaboration with agency DBAs and other data management staff. This position may also at times provide backup technical support in the installation, upgrade and maintenance of IBM Information Server products on a Sun Solaris Operating System. The position requires highly analytical and technical use of specialized software.

**BACKGROUND:**
The SOM currently operates an IBM DataStage/QualityStage environment for ETL. SOM currently has over 300 jobs in production and some additional ones in development or testing.

**PROJECT OBJECTIVE:**
The objective of this request is to secure a development resource

The services are expected to begin on April 28, 2014. The initial estimated time period is from 4/28/2014-9/30/2014, but may continue beyond the current contract period as agreed upon by both the State of Michigan and the selected vendor.
SCOPE OF WORK/TASKS:
Works with IT staff supporting various departments in the development of ETL systems and other data
warehouse based applications including reporting, dashboards and other information analysis and delivery
systems.

Development support is required to assist with the following tasks:
- Create ETL jobs using IBM DataStage and QualityStage
- Analyze and prepare reports on data systems using IBM Information Analyzer
- Schedule ETL jobs as needed
- Perform testing and troubleshooting of ETL jobs
- Develop technical specifications supporting development of ETL jobs
- Extract, transform and load systems to move data from the various operational systems in which it is
collected to a cleansed, consolidated data warehouse.
- Some custom script development – possibly using SQL/ or Unisys
- Work with developers and end user query developers to design and improve database queries.
- Provide introductory level training to DTMB personnel and others on these tools and processes.
- Provide backup system administration functions for the ETL toolset
- Provide technical on-call assistance, as required, in support of the ETL tool

Other: Data Analysis Tools
- IBM DataStage
- IBM Quality Stage
- IBM Information Analyzer
- Unix Environment

DELIVERABLES:
Deliverables will not be considered complete until the Agency and DTMB Project Managers have formally
accepted them. Deliverables for this project include, but not limited to:

Develop within the ETL environment.
Support the ETL environment.

APPROVAL OF DELIVERABLES, IN GENERAL:
(a) All Deliverables (Physical Deliverables, Written Deliverables, and Service Deliverables) require formal
written approval by the State, in accordance with the following procedures. Formal approval by the State requires
that the Deliverable be confirmed in writing by the State to meet its specifications, which will include the
successful completion of Testing as applicable in Section 6.3, to be led by the State with the support and
assistance of Contractor. The parties acknowledge that the approval process set forth herein will be facilitated by
ongoing consultation between the parties, visibility of interim and intermediate Deliverables and collaboration on
key decisions.

(b) The State’s obligation to comply with any State Review Period is conditioned on the timely delivery of
Deliverables being reviewed.

(c) Prior to commencement of its review or testing of a Deliverable, the State may inspect the Deliverable to
confirm that all components of the Deliverable have been delivered without material deficiencies. If the State
determines that the Deliverable has material deficiencies, the State may refuse delivery of the Deliverable without
performing any further inspection or testing of the Deliverable. Otherwise, the review period will be deemed to
have started on the day the State and Contractor receive the Deliverable and agree that the Deliverable is ready
for use and, where applicable, Contractor has provided certification in accordance with Section 6.3(a).

(d) The State will approve in writing a Deliverable upon confirming that it conforms to and, performs in
accordance with, its specifications without material deficiency. The State may, but shall not be required to,
conditionally approve in writing a Deliverable that contains material deficiencies if the State elects to permit
Contractor to rectify them post-approval. In any case, Contractor will be responsible for working diligently to
correct within a reasonable time at Contractor’s expense all deficiencies in the Deliverable that remain
outstanding at the time of State approval.

(e) If, after three (3) opportunities (the original and two repeat efforts), Contractor is unable to correct all
deficiencies preventing Final Acceptance of a Deliverable, the State may: (i) demand that Contractor cure the
failure and give Contractor additional time to cure the failure at the sole expense of Contractor; or (ii) keep any
resulting Contract(s) in force and do, either itself or through other parties, whatever Contractor has failed to do, in
which event Contractor shall bear any excess expenditure incurred by the State in so doing beyond the Contract(s) price for such Deliverable and will pay the State an additional sum equal to ten percent (10%) of such excess expenditure to cover the State’s general expenses provided the State can furnish proof of such general expenses; or (ii) terminate the particular Statement of Work for default, either in whole or in part by notice to Contractor provided Contractor is unable to cure such breach. Notwithstanding the foregoing, the State shall not use, as a basis for exercising its termination rights under this Section, deficiencies discovered in a repeat State Review Period that could reasonably have been discovered during a prior State Review Period.

(f) The State, at any time and in its reasonable discretion, may halt the testing or approval process if such process reveals deficiencies in or problems with a Deliverable in a sufficient quantity or of a sufficient severity as to make the continuation of such process unproductive or unworkable. In such case, the State may return the applicable Deliverable to Contractor for correction and re-delivery prior to resuming the testing or approval process.

**PROCESS FOR APPROVAL WRITTEN DELIVERABLES:**
The State Review Period for Written Deliverables will be the number of days set forth in the applicable Statement of Work/Purchase Order following delivery of the final version of the Deliverable (failing which the State Review Period, by default, shall be five (5) Business Days for Written Deliverables of one hundred (100) pages or less and ten (10) Business Days for Written Deliverables of more than one hundred (100) pages). The duration of the State Review Periods will be doubled if the State has not had an opportunity to review an interim draft of the Written Deliverable prior to its submission to the State. The State agrees to notify Contractor in writing by the end of the State Review Period either stating that the Deliverable is approved in the form delivered by Contractor or describing any deficiencies that must be corrected prior to approval of the Deliverable (or at the State’s election, subsequent to approval of the Deliverable). If the State delivers to Contractor a notice of deficiencies, Contractor will correct the described deficiencies and within five (5) Business Days resubmit the Deliverable in a form that shows all revisions made to the original version delivered to the State. Contractor’s correction efforts will be made at no additional charge. Upon receipt of a corrected Deliverable from Contractor, the State will have a reasonable additional period of time, not to exceed the length of the original State Review Period, to review the corrected Deliverable to confirm that the identified deficiencies have been corrected.

**PROCESS FOR APPROVAL OF SERVICE DELIVERABLES:**
The State Review Period for approval of Service Deliverables is governed by the applicable Statement of Work/Purchase Order (failing which the State Review Period, by default, shall be forty-five (45) Business Days for a Service Deliverable). The State agrees to notify Contractor in writing by the end of the State Review Period either stating that the Deliverable is approved in the form delivered by Contractor or describing any deficiencies that must be corrected prior to approval of the Deliverable (or at the State’s election, subsequent to approval of the Deliverable). If the State delivers to Contractor a notice of deficiencies, Contractor will correct the described deficiencies and within thirty (30) Business Days resubmit the Deliverable in a form that shows all revisions made to the original version delivered to the State. Contractor’s correction efforts will be made at no additional charge. Upon receipt of a corrected Deliverable from Contractor, the State will have a reasonable additional period of time, not to exceed the length of the original State Review Period, to review the corrected Deliverable to confirm that the identified deficiencies have been corrected.

**PROCESS FOR APPROVAL OF PHYSICAL DELIVERABLES:**
The State Review Period for approval of Physical Deliverables is governed by the applicable Statement of Work/Purchase Order (failing which the State Review Period, by default, shall be forty-five (45) continuous Business Days for a Physical Deliverable). The State agrees to notify Contractor in writing by the end of the State Review Period either stating that the Deliverable is approved in the form delivered by Contractor or describing any deficiencies that must be corrected prior to approval of the Deliverable (or at the State’s election, subsequent to approval of the Deliverable). If the State delivers to Contractor a notice of deficiencies, Contractor will correct the described deficiencies and within thirty (30) Business Days resubmit the Deliverable in a form that shows all revisions made to the original version delivered to the State. Contractor’s correction efforts will be made at no additional charge. Upon receipt of a corrected Deliverable from Contractor, the State will have a reasonable additional period of time, not to exceed the length of the original State Review Period, to review the corrected Deliverable to confirm that the identified deficiencies have been corrected.

**DELIVERABLE ACCEPTANCE CRITERIA:**
Deliverables will not be considered complete until the Agency and DTMB Project Managers have formally accepted them.

**PROJECT CONTROL AND REPORTS:**
A bi-weekly progress report must be submitted to the Agency and DTMB Project Managers throughout the life of
this project. This report may be submitted with the billing invoice. Each bi-weekly progress report must contain
the following:

1. **Hours**: Indicate the number of hours expended during the past two weeks, and the cumulative total to
date for the project. Also state whether the remaining hours are sufficient to complete the project.
2. **Accomplishments**: Indicate what was worked on and what was completed during the current reporting
period.
3. **Planned Tasking**: Describe activities to be accomplished during the next reporting period.
4. **Funds**: Indicate the amount of funds expended during the current reporting period, and the cumulative
total to date for the project.
5. **Issues**: Indicate major issues/risks/changes, real or perceived, and recommend resolutions.

**SPECIFIC AGENCY STANDARDS:**
Agency standards, if any, in addition to DTMB standards.

**PAYMENT SCHEDULE:**
Payment will be made on a time and materials (hourly) basis. DTMB will pay CONTRACTOR upon receipt of
properly completed invoices which shall be submitted to the billing address on the State issued purchase order
not more often than monthly. DTMB Accounts Payable area will coordinate obtaining Agency Project Manager
and DTMB Project Manager approvals. All invoices should reflect actual work completed by payment date, and
must be approved by the Agency Project Manager and DTMB Project Manager prior to payment. The invoices
shall describe and document to the State’s satisfaction a description of the work performed, the progress of the
project, and fees.

Payment shall be considered timely if made by the DTMB within forty-five (45) days after receipt of properly
completed invoices.

**EXPENSES:**
The State will NOT pay for any travel expenses, including hotel, mileage, meals, parking, etc.

**PROJECT CONTACTS:**
The DTMB Buyer for this project is:

Jarrod Barron
DTMB – Procurement
Buyer, IT Division
Constitution Hall – 1st Floor
525 W. Allegan Street
Lansing, MI 48933
Phone: 517-284-7045
Fax: 517-335-0046
Email: barronj1@michigan.gov

**AGENCY RESPONSIBILITIES:**
- DTMB will provide direction to Contractor staff in regards to work effort and priorities.
- STATE will provide telephone access for project-related calls originating from within the State’s office.
- STATE will provide access to copying equipment for project-related documents.
- STATE will provide access to Facsimile equipment for items that are project related.
- STATE will provide computer hardware and software, as deemed necessary.

**LOCATION OF WHERE THE WORK IS TO BE PERFORMED:**
Contractor will work at 111 S. Capitol Ave., Romney Building in Lansing, Michigan.

**EXPECTED CONTRACTOR WORK HOURS AND CONDITIONS:**
Work hours are not to exceed eight (8) hours a day, forty (40) hours a week. Normal working hours of 8:00 am to
5:00 pm are to be observed unless otherwise agreed to in writing. Contractor should expect non-standard hours
of work for system administration duties that require interruption to service.

No overtime will be permitted, unless prior approval is received in writing.
RIGHT TO OWNERSHIP:

State intends to own the Software at the end of the Contract

- Ownership of Work Product by State. All Deliverables shall be owned by the State and shall be considered works made for hire by the Contractor for the State. The State shall own all United States and international copyrights, trademarks, patents or other proprietary rights in the Deliverables.

- Vesting of Rights. The Contractor agrees to assign, and upon creation of each Deliverable automatically assigns, to the State, ownership of all United States and international copyrights, trademarks, patents, or other proprietary rights in each and every Deliverable, whether or not registered by the Contractor, insofar as any such Deliverable, by operation of law, may not be considered work made for hire by the Contractor for the State. From time to time upon State’s request, the Contractor and/or its personnel shall confirm such assignment by execution and delivery of such assignments, confirmations of assignment, or other written instruments as the State may request. The State shall have the right to obtain and hold in its own name all copyright, trademark, and patent registrations and other evidence of rights that may be available for Deliverables.

CANDIDATES WILL BE EVALUATED ON THE FOLLOWING CRITERIA:

- 1+ Years ETL Administration or Architecture Experience
- 3+ IBM QualityStage / DataStage Experience
- 5+ Years of ETL job development
- 1+ yrs system administration in UNIX Environment experience
- Demonstrated ability to communicate with both technical and business area staff

Prior Experience and Reference Validation will also be considered.

INFORMATION REQUIRED FROM CONTRACTORS

CANDIDATE INFORMATION

- Name and date of availability of the candidate.
- The resume(s) of the actual individual(s) proposed
- The results of two reference checks that the Contractor has performed on the proposed individual, including the names and telephone numbers of the references themselves. At least one of these reference checks must be from a supervisor.
- The results of a criminal background check and any additional screening required by a specific work statement to meet agency requirements upon award.
- Verification of a candidate’s permission to work in the United States.
- Payment Rate for each resume submitted. Payment rates may not exceed the rates in the Contract. However, the Payment rates may be less, depending on the State’s requirements, nature of the job market, and candidate’s abilities.
- A signed commitment letter from the individual referencing the SOW number, with the candidate’s name, signature, and date. Blanket commitment letters for all ITB’s will not be accepted.
- During the response period, the Contractor may request any clarification needed on the Statement of Work.

RATE PROPOSAL

- All rates quoted in contractor’s response to this ITB will be firm for the duration of the contract. No price changes will be permitted.
- For funding, the State requests that the hourly rate for the Data Warehouse Developer be less than $125.00 per hour.

PROPOSAL SUBMITTAL

Submit 1 copy of each qualified name and resume and 1 copy of the Rate Proposal in accordance with the
following instructions:

- Submit all bids ELECTRONICALLY via BUY4MICHIGAN NO LATER THAN 3:00 P.M. ON THE DUE DATE AS INDICATED ON BUY4MICHIGAN.
  - Submit with your proposal a signed cover letter with the company name, contact name and phone number, contact email address, vendor ID number, and ITB number

All resumes submitted must be sent "blind" (not on company letterhead and without logos or identifying company marks)