



NOTICE TO VENDOR

**ALAMEDA COUNTY SOCIAL SERVICES AGENCY (SSA)
REQUEST FOR INTEREST (RFI)**

FY 2008 - 2009

IBM D5000 Data Warehouse System Training – DB2, Entity Analytics, Relational Database Design, Linux System Administration, and Cognos – All IBM Certified Courses Fundamentals through Advance

RFI RESPONSE DEADLINE

May 11, 2009

3:00 P.M.

Monday,

At

**SSA / Contracts Office
2000 San Pablo Ave. 4th Floor
Oakland, CA 94612
Attn: Kathy Chen**

Or

Email to: kchen@acgov.org

This RFI is also posted at: <http://www.acgov.org/gsa/purchasing/index.htm>

AND

At SSA Website Under FUNDING OPPORTUNITIES:

<http://www.alamedasocialservices.org/>

To vendors registered or certified in the Small Local Emerging Business Vendor Database: Maintain correct and accurate e-mail address information to ensure receipt of future RFI/RFPs.

A. INTENT

The intent of the Business Intelligence Education RFI is to search for a certified IBM training vendor that can deliver local and on-site DB2, Data Warehousing, Linux, Rational Data Architect, and Cognos fundamentals through advanced courses. SSA is in the process of enhancing its ability to link data sets with the goal of more fully understanding the inter-relationships between its programs and the dynamics that drive its caseloads and program outcomes. To that end SSA has purchased and installed IBM's D5000 pre-configured and pre-balanced data warehouse using Entity Analytic and Cognos business intelligent tools. The data warehouse uses a DB2 application platform and Linux operating system. This state-of-the-art data warehouse requires a fully trained staff in all of its disciplines and we are looking for an organization capable of delivering the needed training.

B. SCOPE

Background

Implementation of data warehouse and business intelligence technologies in a social services setting is an important next step in managing welfare client outcomes and improving overall business performance.

The amount of data accumulated and stored in social service organizations is extremely large and originates from many disparate sources. In the case of SSA, data originates from the child welfare systems (CWS/CMS), California Welfare Information system (CalWIN), and the Adult & Aging Program's system (California Management Information Payrolling System - CMIPS). Data is also received from other state agencies such as the Employment Development Department, private and non-profit organizations, and the universities, other local government agencies and departments, and ad hoc systems and databases developed within the agency. The challenge is not obtaining data; the challenge is synthesizing all of this data into actionable information the SSA needs to maximize the effectiveness of its programs. Other challenges include reducing the tremendous human effort and time needed to extract and report out information derived from the different data sources.

In today's environment, SSA must respond quickly to new challenges, and it requires a very high degree of confidence in its data. As noted above, SSA has identified two immediate needs and a large number of needs that will be addressed after the two described below.

The first immediate need is SSA Department of Children and Family Services (DCFS) and Probation Departments (PD) participation in the Title IV-E Waiver. Title IV-E of the Social Security Act establishes:

- The Foster Care and Adoption Assistance programs for certain children who receive foster care services or subsidized adoption.
- Requirements for the states to follow in both administration and operation to receive federal support under the programs.

Under the Title IV-E program, each individual program is funded at different levels (or amounts of dollars). The aim of the waiver program is to utilize spending flexibility for a series of proactive reinvestment strategies to better direct financial resources away from expensive care and ineffective services to prevention, early intervention, and long-term support strategies that serve youth and their caretakers with engaging, cost effective, localized, familial, and neighborhood and mentor-based supports. It is incumbent upon SSA to fully understand the changes in cost, performance, and effectiveness of this strategic program on a real-time basis. The ability to understand performance respond quickly to positive or adverse affects of the waiver program is essential to its overall success.

The second highly visible near-term challenge is SSA's response to the client work participation rate (WPR) requirements as set forth in the Deficit Reduction Act (DRA) of 2005. Under the Welfare Act of 1996, adults receiving assistance are expected to engage in work activities and develop the capability to support themselves before their time-limited assistance runs out. All states including California and subsequently Alameda County SSA are required to assist recipients in making the transition to employment. The DRA requires the state (and incumbent upon all counties) to meet the work participation rates and other critical program requirements in order to maintain their full Federal funding and avoid penalties. The target rate for California is fifty percent. Any county that does not meet the fifty percent target will contribute proportionally toward paying the states penalty.

In order to avoid paying penalty for not meeting the WPR requirement, SSA has taken aggressive steps to re-engineer its Employment programs. It uses systems and tools to track the progress of its clients and performance of its staff in an effort to successfully increase the rate of employment of per welfare recipient. Tracking clients from the moment they begin receipt of benefits, determining their eligibility for reentry into the work place, the various stages of work participation preparation is paramount to SSA's meeting state requirements. The tools and services used have proven very effective and used extensively by management and staff. However these services are not owned by SSA and are specific in nature, they lack the timeliness and flexibility needed to fully address all the needs of the organization. The ability to know in **near** real-time the status of every client in all stages of the WPR process is critical to the success meeting the state requirements and avoiding penalties. With immediate knowledge of this information, SSA can make the needed adjustments to the program in a more timely and effective manner.

General Scope of this Project

With the data warehouse near ready for production, it is imperative the staff have the skills needed to maintain the system on an ongoing basis. SSA is seeking certified IBM training vendors with the demonstrated experience of developing curriculums that will ensure that the SSA technical staff meet the task of managing this data warehouse.

General System Characteristics

Training must be available both on site and local. All instructors must be expert in their particular discipline.

Specific Characteristics

The following are the specific training curriculum needed:

- DB2 Fundamentals

- DB2 9 for LUW
- Multiple Partition
- DBA Workshop
- Advanced Database
- Administration fro Experts
- Data Warehousing
 - Relational Database design
 - Architecting the data warehouse
- Linux system Administration
 - Implementation
 - TCP/IP and TCP/IP Services
 - Using Rational Data Architect
- Entity Analytics Fundamentals V4.2
 - Advanced Entity Analytics
 - Configuration
- Cognos
 - BI Report
 - Studio: Authoring
 - Professional Reports
 - Fundamental
 - IT Administration/developer
 - Framework
 - Manager: Designing
 - Metadata Models
 - Metrics Managers
 - Designing
 - Scorecards

A single vendor is expected to be the agent of record for all IBM D5000 Data Warehouse training needs. All Classes must be IBM certified and must be prerequisite for individual certifications in each of the above mentioned disciplines.

C. COUNTY RESPONSIBILITES

The County will:

- Provide the appropriate workspace for the vendor’s trainers on an as needed basis.
- Select a SSA personnel for purposes of knowledge transfer.

D. CONTRACT TERMS AND AMOUNT

1. Contract will be effective for the duration of on-site training as specified in this RFI.
2. The maximum contract amount is no greater than \$150,000.

3. The contract will include clauses covering mandatory contract terms and conditions, order of precedence, compliance with laws, liability, period of performance, force majeure¹, availability of funds, notices, disputes, failure of performance, damages and termination.
4. Audit & Record Retention - The contract will contain a clause that grants the federal government, the State, or their duly authorized representatives access to any books, documents, papers, and records of the contractor, which are directly pertinent to that specific contract for the purpose of making audit, examination, excerpts and transcriptions.

The contractor is to retain all required records for three years after final payment or until any pending matter is closed, whichever is later.

E. VENDOR QUALIFICATION CRITERIA

Under this RFI, SSA requires an eligible and established vendor to meet the following requirements:

1. Must have demonstrated ability to provide or coordinate the provision of the exact IBM training classes requested.
2. The ability to provide training at SSA or designated site.
3. Possession of all permits, licenses and professional credentials.

F. SPECIFIC RATING CRITERIA:

Proposals resulting from this RFI or subsequent RFP process will be reviewed and rated as follows:

<u>Rating Element</u>	<u>Possible Points</u>	<u>Points Earned</u>
General System Characteristics as specified on page 3 of this RFI	25	
Specific Characteristics and System Requirements as specified on page 3 and 4 of this RFI	75	

G. COUNTY CONTACTS

Questions regarding this RFI must be submitted in writing to:

Attn: Don R. Edwards
 Alameda County SSA Agency
 2000 San Pablo Ave. 4th floor, Oakland, CA 94612
 Phone: 510-645 -9350
 Fax: 510-271-9189
 Email to: Don.Edwards@acgov.org

¹ A clause excusing a contracting party from liability if some unforeseen event beyond the control of that party (for example war, natural disasters, or other "Acts of God") prevents it from performing its obligations under the contract.

H. COUNTY PROVISIONS

- a. The County is vitally interested in promoting the growth of small and emerging local businesses by means of increasing the participation of these businesses in the County's purchase of goods and services.

In order to encourage businesses to locate and remain in the County, to provide and enhance employment opportunities for persons living in the County, and to contribute to the economic environment of the County, the General Services Agency will incorporate the following requirements into any subsequently issued RFP.

- a. Small and Emerging Locally Owned Business: A small business for purposes of this RFI is defined by the United States Small Business Administration as having no more than \$25,000,000 in average annual gross receipts over the last three (3) years. An emerging business, as defined by the County is one having annual gross receipts of less than one-half (1/2) of the above amount over the same period of time and has been in business less than five (5) years. In order to participate herein, the small or emerging business must also satisfy the locality requirements and be certified by the County as a Small or Emerging, local business. A certification application package (consisting of Instructions, Application and Affidavit) will be included in any subsequently issued RFP to be completed and returned by a qualifying contractor. The certification application package is also available at https://acweb.acgov.org/sleb_app/EntryFormServlet
 - b. A locally owned business, for purposes of satisfying the locality requirements of this provision, is one which holds a valid business license issued by the County or a city within the County and where the owner maintains a fixed office located in and having a street address within the County for at least six (6) months prior to the date upon which a request for sealed bid or proposal is issued.
- b. As a result of the County's commitment to advance the economic opportunities of small and emerging local businesses the following provisions will apply to any subsequently issued RFP:
 - a. If bidder is certified by the County as either a small and local or an emerging and local business, the County will provide a five percent (5%) bid preference, in addition to a five percent (5%) local preference, for a total bid preference of ten percent (10%). However, a bid preference cannot override a State law, which requires the granting of an award to the lowest responsible bidder.
 - b. Bidders not meeting the small or emerging local business requirements set forth above do not qualify for a bid preference **and** must subcontract with one or more County certified small and/or emerging local businesses for at least twenty percent (20%) of bidder's total bid amount in order to be considered for the contract award.
 - c. The County reserves the right to waive these small/emerging local business participation requirements for this contract, if the additional estimated cost to the County, which may result from inclusion of these requirements, exceeds five percent (5%) of the total estimated contract amount or Ten Thousand Dollars (\$10,000), whichever is less.

The following entities are exempt from the Small and Emerging Local Business (SLEB) requirements as described above and are not required to subcontract with a SLEB. If you apply and are certified as a SLEB, you will receive a 5% SLEB bid preference:

- non-profit community based organizations (CBO);
- non-profit churches or non-profit religious organizations (NPO);
- public schools and universities; and
- government agencies.

Non-profits must provide proof of their tax exempt status. These are defined as organizations that are certified by the U.S. Internal Revenue Service as 501(c) 3.

If additional information is needed regarding this requirement, please contact the Auditor-Controller's Office of Contract Compliance (OCC) located at 1221 Oak St., Rm. 249, Oakland, CA 94612 at Tel: (510) 891-5500, Fax: (510) 272-6502 or via E-mail at ACSLEBcompliance@acgov.org.

- d. First Source Program: The First Source Program has been developed to create a public/private partnership that links CalWORKs job seekers, unemployed and under employed County residents to sustainable employment through the County's relationships/connections with business, including contracts that have been awarded through the competitive process, and economic development activity in the County. Welfare reform policies and the new Workforce Investment Act require that the County do a better job of connecting historically disconnected potential workers to employers. The First Source program will allow the County to create and sustain these connections. Vendors awarded contracts for goods and services in excess of One Hundred Thousand Dollars (\$100,000) as a result of any subsequently issued RFQ are to allow Alameda County ten (10) working days to refer potential candidates to vendor to be considered by Vendor to fill any new or vacant positions that are necessary to fulfill their contractual obligations to the County, that Vendor has available during the life of the contract before advertising to the general public. Potential candidates referred by County to Vendor will be pre-screened, qualified applicants based on vendor specifications. Vendor agrees to use its best efforts to fill its employment vacancies with candidates referred by County, but the final decision of whether or not to offer employment, and the terms and conditions thereof, rest solely within the discretion of the Vendor.

If compliance with the First Source Program will interfere with Contractor's pre-existing labor agreements, recruiting practices, or will otherwise obstruct the Contractor's ability to carry out the terms of the contract, the Contractor will provide to the County a written justification of non-compliance.

If additional information is needed regarding this requirement, please contact the Auditor-Controller's Office of Contract Compliance (OCC) located at 1221 Oak St., Rm. 249, Oakland, CA 94612 at Tel: (510) 891-5500, Fax: (510) 272-6502 or via E-mail at ACSLEBcompliance@acgov.org.

I. ESTIMATED CALENDAR OF EVENTS

Event	Date
RFI Issued	April 25, 2009
RFI Response Due	May 11, 2009

***Note:** Dates indicated are approximate.

REQUEST FOR INTEREST RESPONSE FORMAT

1. Complete the following “Vendor Application”. All areas above “To be completed by Auditor’s Office/GSA Purchasing” must be completed. If utilizing the on-line Vendor Application, **IBM D5000 Data Warehouse System Training** must be typed where requested to **List the Services Vendor is interested in providing**. On-line Vendor Applications are also available on the Alameda County Web Site: http://www.acgov.org/jsp_app/gsa/vendor_application/index.jsp.
2. Prepare a brief statement in no more than five pages on 8 ½” x 11 paper single-sided that describes your organizations’ interests and qualifications to partner with SSA to deliver the services as outlined in this RFI.
3. Use one page on 8 ½” x 11 paper single-sided to provide the project budget. One additional page is allowed.
4. Return above documents preferably via e-mail due by 3:00 PM on May 11, 2009 to:
Kathy Chen, Contracts Office
E-mail to: kchen@acgov.org
Phone #: 510-267-9459

The subject of the e-mail must read: RFI – IBM D5000 Data Warehouse System Training.

If an e-mail submission is not possible, you may send via U.S. Mail by the deadline to the following:

Attn: Kathy Chen, Contracts Office
Alameda County SSA Agency
2000 San Pablo Avenue, 4th Floor, Oakland, CA 94612
Envelopes must be clearly marked:
RFI – IBM D5000 Data Warehouse System Training

<p>NOTE: Final Proposals will be due at the above address by 3:00 PM on May 11, 2009. <u>Postmarks do not qualify for meeting the deadline.</u> RFI responses received after the due date and time are not guaranteed to be included</p>
--

VENDOR APPLICATION - County of Alameda

Submit online: <http://www.acgov.org> Select **Vendor Application** at bottom of home page
Mail, Email or FAX to: **ALAMEDA COUNTY GENERAL SERVICES AGENCY PURCHASING DEPARTMENT**

1401 Lakeside Drive, Suite 907, Oakland, California 94612

FAX NUMBER: (510) 208-9626

E-Mail: PAMGR@acgov.org

- Request: Add new vendor
 Add new doing-business-as (DBA) name for existing vendor
 Add new address for existing vendor
Change: Name DBA Address for existing vendor **(Check one)**
 Other

Vendor Information:

Full Legal Business Name: _____

DBA Name: _____

- Type of Entity: Individual Sole Proprietor Partnership
 Corporation Tax-Exempted Government or Trust

Check the boxes that apply to Alameda County payments you may receive:

- Goods Only Goods & Services Rents/Leases Rents/Leases paid to you as the agent
 Medical Services Legal Services Other Services (describe) _____
 Settlement, Judgment, Refunds (If checked, skip **Composition of Ownership** section below)
 Court Appointed Services (If checked, skip **Composition of Ownership** section below)

Federal Tax ID Number (required): _____

PO Box/Street Address: _____

City: _____ State: _____ ZIP: _____

Is your business located in Alameda County? Yes No If yes, how long? _____ Yr. _____ Mo.

Vendor Contact's Name: _____

Contact's Telephone: _____ FAX _____ Toll-Free _____

Vendor Contact's E-mail address: _____

Composition of Ownership – This is a Required Section

Are you a publicly traded entity, a public school, or a government? Yes No

Are you a non-profit, or a church? Yes No

If "Yes" to one of the above, skip Ethnicity and Gender below. The Collection of ethnicity and gender data is for statistical and demographic purposes only. **Please check the ONE most applicable in each category:**

Ethnicity

- African American or Black (greater than 50%) Hispanic or Latino (greater than 50%)
 American Indian or Alaskan Native (greater than 50%) Native Hawaiian/Pacific Islander (greater than 50%)
 Asian (greater than 50%) Multi-ethnic minority ownership (greater than 50%)
 Caucasian or White (greater than 50%) Multi-ethnic ownership (50% Minority–50% Non-Minority)
 Filipino (greater than 50%)

Gender

- Female (greater than 50% Ownership) Male (greater than 50% Ownership)

List the Product and/or Services Vendor is interested in providing; include North American Industry Classification System (NAICS) Code (available at https://eweb1.sba.gov/naics/dsp_naicssearch2.cfm)

CONTRACT NAME: _____

NAICS CODE (S): _____

Completed by: _____ Title: _____ Date: _____

To be completed by Auditor's Office/GSA Purchasing

Acknowledged by: _____ on _____ (Date): _____

____ The Auditor's Office/GSA Purchasing Department added/modified the vendor record according to the information provided above. **The assigned vendor number is:** _____

____ The Auditor's Office/GSA Purchasing Department could not add or modify the vendor record for the following reason(s): _____

Please resubmit this form with the requested information.