

# **REQUEST FOR PROPOSAL**

## **SELECTION OF ORACLE APPLICATION DATA BASE ADMINISTRATOR/PROGRAMMER FOR THE ASSOCIATION OF BAY AREA GOVERNMENTS**

### **BACKGROUND**

The Association of Bay Area Governments (ABAG) is a joint powers agency created by the cities and counties of the San Francisco Bay Area in 1961. Its function is to provide various services to its member jurisdictions with the objective of enhancing effectiveness in government, local control, planning for the future and cooperation on Bay Area-wide issues. ABAG is governed by an executive board, which is made up of member representatives. At present, all nine counties and 100 of the 101 cities in the Bay Area are ABAG members. In addition, numerous special districts and out-of-the-region cities are non-voting cooperative members. Any California city or county may become a member or cooperative member of ABAG. ABAG receives about 7% of its funding from membership dues, 69% from Federal, State and local grants and 24% from various entrepreneurial services including census information, training, financing, insurance and power purchasing pools.

### **THE IMPLEMENTED ORACLE SYSTEM APPLICATIONS AT ABAG**

#### **Oracle Financial System**

ABAG has been using the Oracle Financial System since July 1, 1999. The Oracle system consists of three modules--General Ledger, Accounts Payable and Accounts Receivable. We have been keeping current with upgrades and most recently installed the Oracle E-Business Suite. This is a Multi Organization installation and currently two sets of books have been defined (i.e. two companies). ABAG also uses an in-house developed Personnel Cost Allocation System to allocate personnel and related indirect costs to projects. The Personnel Cost System uploads to the Oracle Financial System once a month through an Excel macro program—Application Destop Integrator (ADI). We also use ADI to generate financial reports. ADI is installed in a Citrix server.

Server & Desktop OS:	Sun Solaris, Ver.8 and Citrix Server for ADI, Windows XP
Applications:	Oracle E-Business Suite (GL, AR and AP modules), Ver. 11.5.4
Database:	Oracle 8.1.7.4. (Both Production and Test database)
Tools:	ADI and OEM.

#### **Future Plan:**

- 1) Need to upgrade Oracle E-Business Suite from 11.5.4 to 11.5.9.
- 2) Need to upgrade Oracle database from 8i to 9i.
- 3) Need to set-up another company (i.e. a third company) in Oracle E-Business Suite.

### **Claims Management System**

The ABAG PLAN Corporation, an affiliated entity, is a general liability and property insurance pool for 30 Bay Area cities. All claims are processed in-house at ABAG through a third party application—Risk Master. Risk Master runs on an Oracle database. We are also in the process of implementing Business Intelligence, a web based report generation system to interface with the Risk Master System.

Server & Desktop OS: Sun Solaris, Ver.8 and Windows XP  
Applications: Risk Master and Business Intelligence  
Database: Oracle 8.1.7.4. (Production database) and 10g (Test database)

#### Future Plan:

- 1) Need to upgrade Oracle database from 8i to 10g.

### **Mailing Labels System**

This is an in-house customer management system developed over the last 2 years by ABAG to track contact information of elected officials and key personnel in Bay Area government jurisdictions. This web based application runs on an Oracle database.

Server & Desktop OS: Sun Solaris, Ver.8, Windows XP  
Applications: In-house application  
Database: Oracle 9i  
Language and tools: Oracle 9i Forms, Reports and Pro\*C

#### Future Plan

- 1) Need to develop client business transaction history, e.g. training courses taken, publications purchased, etc
- 2) Need to support the publication of a Bay Area Directory

### **FUTURE SYSTEM DEVELOPMENT PROJECTS**

There are several in-house system development projects that are either currently underway or in planning. Examples of these projects include but are not limited to:

#### **Personnel Cost Allocation System (PCA)**

The current PCA system that we use to upload monthly personnel costs to the Oracle Financial System is a DOS based system written in-house about twenty years ago. We would like to develop a web based system with the following key functions: (1) Web based time sheet preparation and uploading; (2) Tracking of employee time by person and by project; (3) Accumulation of personnel costs by person and by project; (3) Indirect cost allocation to projects based on a standard overhead rate; (4) Overhead exemption option for specific employees and projects; (5) User definable reports that are exportable to Excel. (5) Automated interface with Oracle Financial System.

#### **Business Recovery Backup System**

Currently under development is a web based remote backup system physically located in Sacramento. When completed, the agency's selected data files will be backed up nightly. In the

first phase of this backup system, the data files included will be Oracle Financial, Claims Processing, Mailing Labels and Training Center.

### **Federal Grant Application Management System**

In the planning stage is a web based automated public comment database for Federal grant applications submitted by Bay Area public entities. We expect this system to be developed with an Oracle back end.

### **SCOPE OF WORK**

We are seeking a consulting firm to perform day-to-day Oracle database and system administration as well as specific in-house system development projects. Most of the work will be performed on site and a suitable workstation will be provided at ABAG offices. We guarantee the minimum billable time will not be less than 24 hours per week and limit the maximum billable time to 40 hours per week. Specific duties include but are not limited to the following:

- 1) Installing/configuring/troubleshooting Oracle applications including Apache Web Server/Jserver, 9iAS and other components to make the applications functional.
- 2) Maintain, upgrade, patch, and clone applications.
- 3) Perform System Administrator activities such as registering printers, creating users, allocating module access, and creating custom interface for various Oracle Applications.
- 4) Troubleshoot and resolve Concurrent Manager related issues.
- 5) Monitor and tune application for optimal performance.
- 6) Install, upgrade and maintain ADI (Application Desktop Integrator) tool.
- 7) Resolve application functional issues related to GL, AR and AP modules in Oracle Financial System.
- 8) Set-up and maintain Multiple-Organizations in Oracle E-Business Suite.
- 9) Install and publish applications (ADI and Risk Master) on Citrix Server, and install Client Software.
- 10) Monitor, maintain, upgrade, patch and tune Oracle databases.
- 11) Maintain and periodically test backup and recovery process for Oracle databases.
- 12) Maintain, troubleshoot and develop Pro\*C programs, Oracle Forms, and Reports for in-house applications.
- 13) Design, develop, test and implement new systems as needed.

### **QUALIFICATIONS REQUIREMENTS**

- 1) The person assigned to ABAG must be a certified Oracle DBA
- 2) At least 4 years experience as an Oracle DBA
- 3) At least 3 years experience as an Oracle Application DBA
- 4) Experience in designing and programming system applications with demonstrated accomplishments using Pro\*C, Oracle Forms and Reports
- 5) Good communication skills

### **CONTRACT TERM**

We are requesting proposals for an annually renewable contract for up to five years. The expected starting date is May 1, 2005.

### **INFORMATION REQUESTED**

For ease of evaluation, please respond to the questions in the order presented and keep the responses as concise as possible.

- 1) Please provide your firm name, address, phone number and general background information.
- 2) Please identify the consultant and present an updated resume.
- 3) List comparable engagements over the last several years for which the individual listed above has had experience. The list should include names of client organizations, type of business, name and phone number of contact person, and types of service provided by your firm to the client.
- 4) Describe the consultant's proficiency in the following: (a) Maintaining, upgrading, patching, and tuning Oracle applications and databases; (b) Oracle Forms and Reports; (c) Pro\*C; (d) Examples of implemented system applications developed and programmed by the consultant.
- 5) It is the policy of ABAG to encourage participation of minority and women-owned firms in its consulting engagements. Indicate whether your firm is a MBE/WBE firm or whether MBE/WBE participation is included in your proposal. In addition, describe your firm's diversity policies and programs including hiring and promotion of minorities and women in your organization.
- 6) Please elaborate on your approach in performing the scope of work as outlined above.
- 7) A schedule of your fees as outlined in Exhibit A. Please provide: (a) First-year hourly billing rate, (b) Formula for adjusting your billing rate annually e.g. Bay Area Consumer Price Index (CPI) or some other factors.
- 8) Other helpful recommendations that may benefit our operation.

### **INSURANCE REQUIREMENTS**

Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees.

Minimum Scope of Insurance. Coverage shall be at least as broad as:

- (a) Insurance Services Office Commercial General Liability coverage (occurrence Form CG0001).

- (b) Insurance Services Office Form Number CA 0001 covering Automobile Liability, Code 1 (any auto).
- (c) Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.
- (d) Errors and Omissions Liability insurance appropriate to the Consultant's profession. Architects' and engineers' coverage is to be endorsed to include contractual liability.

Minimum Limits of Insurance. Consultant shall maintain limits no less than:

- (a) General Liability: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
- (b) Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.
- (c) Employer's Liability: \$1,000,000 per accident for bodily injury or disease.
- (d) Errors and Omissions Liability: \$1,000,000 per occurrence.

Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared to and approved by ABAG. At the option of ABAG, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects ABAG, its officers, officials, employees and volunteers; or the Consultant shall provide a financial guarantee satisfactory to ABAG guaranteeing payment of losses and related investigations, claim administration and defense expenses. (Including operations, products and completed operations, as applicable.).

Other Insurance Provisions. The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

- (a) ABAG, its officers, officials, employees and volunteers are to be covered as insureds as respects: liability arising out of work or operations performed by or on behalf of the Consultant; or automobiles owned, leased, hired or borrowed by the Consultant.
- (b) For any claims related to this project, the Consultant's insurance coverage shall be primary insurance as respects ABAG, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by ABAG, its officers, officials, employees or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

(c) Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to ABAG.

(d) Coverage shall not extend to any indemnity coverage for the active negligence of the additional insured in any case where an agreement to indemnify the additional insured would be invalid under Subdivision (b) of Section 2782 of the Civil Code.

Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to ABAG.

Verification of Coverage. Consultant shall furnish the ABAG with original certificates and amendatory endorsements effecting coverage required by this clause. The endorsements should be on forms provided by ABAG or on other than ABAG's forms provided those endorsements conform to ABAG requirements. All certificates and endorsements are to be received and approved by ABAG before work commences. ABAG reserves the right to require complete, certified copies of all required insurance policies, including endorsements effecting the coverage required by these specifications at any time.

## **OTHER REQUIREMENTS**

### **Conflict of Interest**

No employee, officer or agent of ABAG or its affiliated entities shall participate in selection or in the award or administration of a contract if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when:

- a. The employee, officer or agent;
- b. Any member of his/her immediate family;
- c. His/her partner; or
- d. An organization which employs or is about to employ any of the above, has a financial or other interest in the firm selected for award.

No ABAG officers, employees or agents shall either solicit or accept gratuities, favors or anything of monetary value from contractors, potential contractors, or parties to sub-agreements.

### **Interest of Members of or Delegates to Congress**

In accordance with 18 U.S.C. Section 431, no member of, or delegate to the Congress of the United States shall be admitted to a share or part of the contract for services or to any benefit arising therefrom.

## **PROPOSAL SUBMISSION**

Proposals must be signed by an authorized person. Please submit four (4) copies of your proposal by 5:00 PM, Tuesday, February 15, 2005. Responses should be directed to:

Joseph K. Chan  
Finance Director  
Association of Bay Area Governments  
P.O. Box 2050  
Oakland, CA 94604-2050  
101 Eighth Street  
Oakland, CA 94607  
Telephone: (510) 464-7944, FAX: (510) 433-5544  
E-mail: josephc@abag.ca.gov

The Selection Process

A selection committee made up by ABAG staff will grade the proposals by the following guidelines:

- |   |           |
|---|-----------|
| 1) Stability and resources of firm                            | 10 points |
| 2) Experience as an Oracle DBA (at least 4 years)             | 10 points |
| 3) Experience as an Oracle Application DBA (at least 3 years) | 10 points |
| 4) Proficiency with Oracles Tools and Pro*C                   | 10 points |
| 5) Success in in-house system development                     | 10 points |
| 6) Price  | 20 points |

ABAG may choose to interview the top two or three firms and reserves the right to reject all proposals. If a firm is selected by this selection process, a recommendation to authorize the Executive Director to enter into a contract with the selected firm will be presented for approval by the ABAG Executive Board at its next meeting to be held on March 17, 2005.

Thank you very much for your interest. We look forward to receiving your proposal.



Joseph K. Chan  
Finance Director

Date: January 24, 2005

# Exhibit A

## Schedule of Fees

### **First Year:**

First year billing rate per hour: \$\_\_\_\_\_

Minimum 1<sup>st</sup> year total fees: 24 hours X 52 weeks X (1<sup>st</sup> yr. hourly billing rate) = \$\_\_\_\_\_

Maximum 1<sup>st</sup> year total fees: 40 hours X 52 weeks X (1<sup>st</sup> yr. hourly billing rate) = \$\_\_\_\_\_

### **Second to Fifth Year:**

If contract is renewed, the billing rate as well as the total contract minimum and maximum for each succeeding year will be adjusted on renewal date by (choose one):

(a) Bay Area CPI

**OR**

(b) Some other factor (specify):