Request for Proposal
Data Warehouse Design Support

1. Summary

The Vermont Energy Investment Corporation (VEIC), a non-profit corporation, requests proposals for Data Warehouse Design Support.

Responses to this RFP (including attachments) must be delivered electronically to VEIC by 5:00 p.m. EDT on Friday, July 18th, 2014. Responses submitted after 5:00 p.m. EDT will not be accepted. Responses must be submitted electronically via e-mail to Jules Fishelman (jfishelman@veic.org) with RFP Submittal for Data Warehouse Design in the subject line.

2. Vermont Energy Investment Corporation

VEIC is a mission-driven non-profit organization dedicated to reducing the economic and environmental costs of energy use. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, Europe, and Asia. VEIC employs more than 300 professionals and is headquartered in Burlington, Vermont, with offices in Washington, DC, Ohio, and New Jersey. Further information about VEIC can be found on our website: http://www.veic.org.

3. Background

VEIC currently maintains a well-developed set of Data Warehouses and Online Analytical Processing (“OLAP”) cubes, and a robust SQL Server Reporting Services (“SSRS”) infrastructure which delivers business intelligence information to support our three largest energy efficiency programs.

VEIC strives to continually improve the systems that we use to run our business in order to increase operational efficiency, better support our clients, expand the environmental impacts of our work, and meet our contractual goals.

Currently, VEIC utilizes three separate systems to collect and store financial, corporate budget, and efficiency program data, and lacks a central system for storing additional budget and goal data. The members of the staff who rely on information from these systems cannot easily combine data from all three systems into a single report or dashboard.

VEIC is beginning a Business Intelligence Platform Project (“BIPP”) with the specific goal of integrating data from these three systems to create easy-to-understand, rich reports and dashboards which will improve our ability to make effective business decisions.
4. Business Intelligence Platform Project Goals

The BIPP has a defined set of goals which this Warehouse Design effort is expected to address:

- Developing a new corporate Data Warehouse which integrates key financial, corporate budget and energy efficiency program data as well as additional budget and goal data;
- Delivering a set of role-specific business-critical reports and dashboards to VEIC staff;
- Improving data standards and creating a strong “data dictionary” to support ease of use; and
- Compiling a list of improvements and data-integration efforts for future consideration.

5. Scope of VEIC Data Warehouse Design Support RFP

VEIC seeks an experienced, qualified data warehouse design professional or firm to assist our BIPP Team in the design of a data warehouse and Extracted Transform Load (“ETL”) structure which will guide and inform planned development efforts.

The vendor shall work with VEIC’s project team to review:

- Existing system structures and capabilities;
- Existing VEIC data warehouse and OLAP systems;
- Data warehouse ingest requirements and data model mock-ups developed by the project team;
- Current BI tools and data delivery systems;
- Requirements for data warehouse outputs;
- Security requirements; and
- Requirements for future growth.

The vendor shall provide the following deliverables:

- Warehouse data model designs;
- Security model design recommendations;
- Recommended physical and software architecture; and
- Recommended BI tools and data delivery systems.

These deliverables will provide the basis for the development of a new data warehouse and data marts.

6. VEIC’s Current Environment

VEIC currently uses the following database systems:

VEIC staff principally uses the following business intelligence solutions to deliver information to staff:

- SSRS
- SSAS
- Microsoft Excel
- Tableau
- R
- Mathematica

VEIC’s critical applications include:

- Energy Efficiency Program Data: Custom-developed line of business application called KITT, which stores data in SQL SERVER 2005.
- Financial Data: Deltek Vision 6.1 using SQL Server 2008R1. VEIC is expected to upgrade to Vision 7.2 using SQL Server 2012 by end of August 2014
- Corporate Budget Data: Adaptive Planning (http://www.adaptiveinsights.com/)

Current Data Volume:

- Energy Efficiency Systems: 20 gigabytes in three production systems, and 30 gigabytes in three production data warehouses
- Financial Systems: 3 gigabytes data stored in a single production system
- Corporate Budget System: Estimated at < 100 megabytes of data

7. Proposal Requirements

The proposal must including the following elements:

**Design approach**

The vendor shall include a description of its approach to supporting design efforts for data warehouse and ETL systems. The proposal must make clear how the vendor will work with VEIC’s internal project team.

The vendor should include an example of a *data warehouse design document*.

**Qualifications**

The proposal must outline the credentials and experience of the members of the team who would be designated to perform the required services. Should the respondent have a very large team, the credentials and experience of a representative sample of team members would be acceptable.

Of specific interest is the vendor’s experience with the Microsoft Business Intelligence Tools Stack, including SSAS, SSRS & SSIS.
Pricing Model

Based on the requirements described in Section 5 of the RFP, the vendor shall include information about how they will charge for their design services.

References

The proposal must include three to five references that have used your professional services for similar projects. Include a contract name, address, and a contact phone number for each reference.

Exceptions to Standard Contract

The bidder is required to clearly state any exceptions to the VEIC standard contract terms, provided in Attachment A.

8. Questions

Individual questions regarding this RFP will be responded to only as follows: questions regarding requirements and scope of work will be received up to 5 p.m. EDT July 11th, 2014 via email only at jfishelman@veic.org, and answers will be posted on the VEIC website (www.veic.org) no later than 5:00 p.m., July 15th, 2014. Questions submitted after 5 p.m. July 11th, 2014 will not be responded to.

VEIC reserves the right not to answer specific questions during this RFP process.

9. Evaluation of Proposals

Proposals are due by 5:00 p.m. EDT on Friday, July 18th, 2014. Proposal selection will be qualifications-based. Proposals will be evaluated on the following criteria:

1. Demonstrated experience and expertise in similar projects including quality of sample design documentation (40 points)
2. Description of design approach (30 points)
3. Pricing model (30 points)

VEIC reserves the right to evaluate proposals on criteria not listed above.

10. Contract Award

VEIC may award a contract based solely on the response to this RFP, or it may award a contract on the basis of discussion or negotiations with one or more bidders or requests for best and final offers. VEIC may request additional data or material prior to making a contract award.
VEIC anticipates selecting a proposal by **July 25th, 2014**. VEIC intends to negotiate contract terms with the most qualified vendor. If unsuccessful, VEIC intends to then negotiate with the next most qualified vendor, until reaching satisfactory contractual arrangements.

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC reserves the right to reject any or all proposals and discontinue this RFP process without obligation or liability to any potential Vendor; to award all or part of the items referenced within the RFP; to accept other than the lowest priced offer; to negotiate with any qualified bidder; and to award more than one contract, if any of these actions is deemed by VEIC in its sole discretion to be in VEIC’s best interest.

**11. Attachments to RFP**

Attachment A – Contract Agreement
Attachment A

CONTRACT AGREEMENT

Between Vermont Energy Investment Corp. and [name of organization]

This Contract dated [dd] day of [mmmm] 20[yy] is between Vermont Energy Investment Corporation (“VEIC”) of 128 Lakeside Avenue, Suite 401, Burlington, VT 05401 and [full name and mailing address of organization] hereafter referred to as the “CONTRACTOR”.

WHEREAS, VEIC desires to employ CONTRACTOR to provide certain services in connection with a Project; and

WHEREAS, CONTRACTOR offers unique services and desires to provide VEIC with such services in connection with a Project;

NOW, THEREFORE, in consideration of the mutual covenants and promises contained herein, the parties hereto agree as follows:

1. SCOPE OF WORK

The CONTRACTOR shall provide all the labor, equipment and any and all other items required to perform the services set forth in Attachment A, “Services and Statement of Work for Work to be Performed by the Contractor for VEIC” (the "Services").

All services to be provided by the CONTRACTOR shall be under the direction of its representative [name of VEIC project manager]. The following CONTRACTOR staff are authorized to provide services under this Contract:

[List of all authorized Contractor staff.]

Any additional CONTRACTOR staff shall be pre-approved by VEIC before beginning work on the Project.

The CONTRACTOR shall submit to VEIC a Progress Report for any month in which it performs any of the Services. The Progress Report shall be in the form of a letter to VEIC and shall outline the actual Services performed since the previous Progress Report, as well as any problems identified with the Services, budget or schedule.

CONTRACTOR will provide VEIC with intermediate work products as they are completed, including interim analyses, working drafts, and memoranda prepared for the Services.

CONTRACTOR shall carry out the Services with due diligence and efficiency, in a practical manner designed to promote the purposes of the Project and with due regard to the obligations of the parties thereto.
PERIOD OF PERFORMANCE
The period of performance for this Contract shall be from [mm/dd/yyyy] through [mm/dd/yyyy].

The work and deliverable schedule detailed in Attachment A shall be strictly adhered to.

FEES AND PAYMENTS
The CONTRACTOR shall be paid accordingly to the following schedule:

[Details on fees and payments as follows]:

Notwithstanding the above, the total Labor Fees and Reimbursable Costs to be paid to the CONTRACTOR to perform all the Services under this Contract shall not exceed $xx,xxx. It is understood that the above Fee and Reimbursable Costs include all of CONTRACTOR’s costs and expenses to perform the Services.

CONTRACTOR will invoice VEIC monthly for Labor, Fee and Reimbursable Costs. The monthly invoices will detail the name of staff, hours being billed, hourly rate, and line item detail of reimbursable expenses and receipts for all reimbursable expenses. Invoices shall be submitted within five business days after the end of each month.

If invoices are submitted by mail they should be sent to:

Accounts Payable
Vermont Energy Investment Corporation
128 Lakeside Avenue, Suite 401
Burlington, VT 05401

If submitted via e-mail invoices should be sent to AccountsPayable@veic.org.

VEIC will pay the CONTRACTOR’s monthly invoices within 30 days.

INDEPENDENT CONTRACTOR
For the purposes hereof, CONTRACTOR is an independent contractor, and shall not be deemed to be an employee or agent of VEIC or the client. CONTRACTOR shall pay any and all taxes and fees on it imposed by any government under this Contract.

INSURANCE
Before commencing Work on this Contract, the CONTRACTOR shall provide Certificates of Insurance to show that the following minimum coverages are in effect. The Certificates of Insurance shall name VEIC as additionally insured party as its interests may appear. All policies shall be noncancellable without 30 days prior written notice from the insurance carrier to VEIC. It is the responsibility of the CONTRACTOR to maintain current Certificates of Insurance on file with VEIC through the term of this Contract.
Workers’ Compensation: With respect to all operations performed under this Contract, the CONTRACTOR shall carry workers’ compensation insurance in accordance with the laws of the State and any other state in which it is performing the Contract Scope of Work.

General Liability Insurance: With respect to all operations performed under this Contract, the CONTRACTOR shall maintain commercial general liability written on an occurrence form with limits of not less than:

- $1,000,000 Each Occurrence
- $1,000,000 General Aggregate
- $1,000,000 Products/Completed Operations Aggregate
- $50,000 Damages for Premises Rented to You

Commercial general liability insurance shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract.

Automotive Liability: The CONTRACTOR shall carry automotive liability insurance covering all motor vehicles, no matter the ownership status, used in connection with this Contract. Limits of coverage shall be in the amount required by any applicable state law.

No warranty is made that the coverages and limits listed herein are adequate to cover and protect the interests of the CONTRACTOR for the CONTRACTOR’s operations. These are solely minimums that have been set to protect the interests of VEIC.

None of VEIC’s insurance coverage shall apply to the CONTRACTOR.

REPRESENTATIONS
CONTRACTOR represents that it is in the business of providing the Services and that it shall perform the Services:

a. In accordance with all applicable federal, state and local laws and regulations; and
b. In accordance with generally accepted industry principles and practices.

The CONTRACTOR further represents that there are no existing undisclosed or threatened legal actions, claims, or encumbrances, or liabilities that may adversely affect the Services or the VEIC’s rights hereunder.

SETTLEMENT OF DISPUTES
Any disputes or differences arising out of this Contract that cannot be amicably settled between the parties shall be finally settled under the Rules of Conciliation and Arbitration of the American Arbitration Association by one or more arbitrators appointed in accordance with said Rules. The arbitration shall take place in Burlington, Vermont. The resulting award shall be final and binding on the parties and shall be in lieu of any other remedy.
INDEMNIFICATION
CONTRACTOR shall defend, indemnify and hold VEIC harmless against: any injury, death, loss, suit or claim, including expenses and attorneys' fees arising from (i) CONTRACTOR's violation of the representations contained in Section 6 hereof; (ii) any liability or loss resulting from CONTRACTOR's failure to pay any taxes or fees imposed upon it by any government under this Contract; and (iii) any other negligent action or omission on the sole part of CONTRACTOR in connection with this Contract.

VEIC shall defend, indemnify and hold the CONTRACTOR harmless against: any injury, death, loss, suit or claim, including expenses and attorneys' arising from any negligent action or omission on the sole part of VEIC in connection with this Contract.

GOVERNING LAW
The interpretation of the terms and conditions of this Contract shall be governed by the laws of the State of Vermont.

DEFAULT TERMINATION
Either party may terminate this Contract in whole or in part in the event that the other party fails to strictly adhere to any of the terms and conditions of this Contract or fails to maintain the progress of the work so as to jeopardize the successful and timely completion of the Project. In such event, CONTRACTOR shall cease such Services immediately upon VEIC’s demand. In the event of termination, CONTRACTOR shall perform such additional work as is necessary for the orderly filing of documents and closing of the Services. Such work shall only pertain to the actual Services and does not include any administrative tasks, such as preparing final invoices, etc. The additional time for filing and closing shall not exceed 5 percent of the total time expended on the undisputed portion of the completed portion of the Services prior to the effective date of termination. CONTRACTOR shall only be compensated for all undisputed portions of the completed portion of the work actually performed prior to the effective date of termination, plus the work required for filing and closing. In the event of termination, CONTRACTOR shall turn over to VEIC all work completed to date; all related documents; and all other information gathered under this Contract.

TERMINATION FOR CONVENIENCE
Notwithstanding any other provision of this Contract, VEIC may terminate this Sub-Contract without cause by giving thirty (30) days advance written notice thereof to CONTRACTOR.

Upon termination of this Contract pursuant to this section, CONTRACTOR shall have no further obligation to provide services to VEIC pursuant to this Contract and, except for payment of fees to CONTRACTOR for services rendered prior to the date of termination VEIC shall have no further obligation to pay CONTRACTOR.

CONTRACTOR shall render a final bill for services to VEIC within thirty (30) days from the date of termination and VEIC shall pay that bill within thirty (30) days of receipt of payment for these services from the Client.
CONFIDENTIALITY OF DATA, INFORMATION, AND DOCUMENTS

CONTRACTOR agrees that all information communicated to it with respect to services to be performed under this Contract, including any confidential information gained by CONTRACTOR by reason of association with VEIC or the client, which is identified at the time of disclosure by an appropriate legend, marking, stamp, or other positive written identification in a prominent location to be confidential is confidential.

CONTRACTOR agrees that all conclusions, recommendations, reports, advice, or other documents generated by CONTRACTOR pursuant to this Contract are confidential. Further, CONTRACTOR:

   a. Shall not disclose any confidential information to any other person or entity unless specifically authorized in writing by VEIC or the client to do so.
   b. Shall use its best efforts to prevent inadvertent disclosure of any confidential information to any third party by using the same care and discretion that it uses with similar data that CONTRACTOR designates as confidential.
   c. Agrees that copies of confidential information may not be made without the express written permission of VEIC and that all such copies shall be returned to VEIC along with the originals.
   d. Shall return to VEIC promptly at VEIC’s request, all confidential materials. Any materials, the return of which is not specifically requested, shall be returned to VEIC promptly at the conclusion of the work on the project or activity to which the materials relate.

However, CONTRACTOR's obligation to hold any information confidential under this Contract shall not apply to any information if the same is:

   (1) In the public domain at the time of disclosure to CONTRACTOR by VEIC or the client, or subsequent to the date of disclosure, without breach of this Contract by CONTRACTOR; or
   (2) Known to CONTRACTOR, as evidenced by written documentation, prior to disclosure of such information by VEIC or the client; or
   (3) Disclosed without restriction to CONTRACTOR by a third party having a bona fide right to disclose the same to CONTRACTOR and without breach of this Contract by CONTRACTOR; or
   (4) Independently developed by representatives of CONTRACTOR who did not have access to said confidential information.

The provisions of this Section shall survive termination of this Contract.

OWNERSHIP OF DATA, INFORMATION AND DOCUMENTS

All reports, studies, plans, specifications, data, and other information developed, written or prepared, by CONTRACTOR pursuant to this Contract, shall be delivered to and become the property of VEIC.

The CONTRACTOR shall not use the Client’s corporate name, logo, identity, any affiliation, or the service mark and any related logo, without VEIC’s and the Client’s prior written consent.

RFP – IT Security Assessment Services, September 2013
COMPETITIVE ACTIVITIES
During the term of this Contract, CONTRACTOR shall not, directly or indirectly, either as an employee, employer, consultant, agent, principal, partner, stockholder, corporate officer, director, or in any other individual or representative capacity, engage or participate in any competitive activity relating to the Project or activity to which this Contract relates.

MAINTENANCE OF RECORDS
The CONTRACTOR shall keep, maintain, and preserve at its principal office throughout the term of the Contract and for a period of three years after the end of the Contract full and detailed books, accounts, and records pertaining to the performance of the Contract, including without limitation, all bills, invoices, payrolls. Contracting efforts and other data evidencing, or in any material way related to, the direct and indirect costs and expenses incurred by the CONTRACTOR in the course of such performance.

However, if any litigation, claim, or audit is started before the expiration of the three-year period, the records shall be retained until all litigation, claims or audit finding involving the records has been resolved.

AUDIT ADJUSTMENT
Any payment made under the Contract shall be subject to retroactive reduction for amounts included therein which are found on the basis of any audit of VEIC or the CONTRACTOR by an agency of the United States not to constitute an allowable charge or cost hereunder.

ASSIGNMENTS, CONTRACTS AND PURCHASE ORDERS
The assignment, transfer, conveyance, Contracting or other disposal of this Contract or any of the CONTRACTOR’S rights, obligations, interests or responsibilities hereunder, in whole or in part, without the express consent in writing of VEIC shall be void and of no effect as to VEIC.

NON-DISCRIMINATION REQUIREMENTS
In accordance with all State and Federal statutory and constitutional non-discrimination provisions, the CONTRACTOR will not discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin, age, disability or marital status.

NOTICES
a. VEIC’s primary contact is [name of VEIC project manager].

b. CONTRACTOR's primary contact is [name of Contractor project manager].

c. Any notice or request required or permitted to be given or made in this Contract shall be in writing to the appropriate primary contact. Such notice or request shall be deemed to be duly given or made when it shall have been delivered by hand, mail, facsimile or electronic mail to the party to which it is required to be given or made, at such party's address specified below or at such other address as the party shall have specified in writing to the party giving such notice, or making such request.
FOR VEIC:

[name of VEIC project manager]
Vermont Energy Investment Corporation
128 Lakeside Avenue, Suite 401
Burlington, VT 05401
Telephone: (802) 658-6060
Fax: (802) 658-1643

For CONTRACTOR:

[full name, mailing address, phone, fax and e-mail of Contractor Project Manager listed above]

ATTACHMENTS
All attachments to this Contract are incorporated by reference and made a part of this Contract. In the event of a conflict between this Contract and any attachment hereto, this Contract shall control.

SEVERABILITY
If any term or provision of this Contract shall be held to be invalid or unenforceable, the remaining terms and provisions of this Contract shall be valid and enforceable to the fullest extent permitted by law.

NONWAIVER
The failure of VEIC to enforce any one or more of the provisions of this Contract shall not be construed to be a waiver thereof, nor shall such failure affect the validity of the Contract, CONTRACTOR's obligations hereunder or the right of VEIC to enforce any provision of the Contract.

COUNTERPARTS
The Contract may be executed in several counterparts by the parties and when so executed shall be considered fully executed to the same extent as if all parties had signed the original document. Facsimile execution is authorized.

ENTIRE AGREEMENT
This Contract, including any appendices, constitutes the entire agreement between VEIC and the CONTRACTOR and supersedes all prior communications, representations, agreements and understandings whether oral or written made by either of them concerning the subject hereof. This Contract may not be modified or amended except by written instrument duly executed by an authorized officer or employee of the party to be bound.

DOCUMENT PRODUCTION
Within the project schedule established in Attachment A, CONTRACTOR agrees to provide VEIC final draft documents in “print-ready” form. All tables and/or links to spreadsheets will be completely filled out with final data. All document formatting will be consistent with Attachment A guidelines. Document style will be consistent with the “style manual” to be developed within the
scope of this project. VEIC will not consider incomplete tables or data, nor format and style inconsistent with Attachment A or the style manual, to meet the CONTRACTOR’s requirements as established in Attachment A of this Contract.

CONTRACT AMENDMENTS
Any changes to the CONTRACTOR’s Scope of Work (Attachment A) and fees will be accomplished via written amendment to this Contract signed by an authorized officer or employee of the CONTRACTOR and VEIC.
IN WITNESS WHEREOF, CONTRACTOR and VEIC have caused this Contract to be executed.

FOR CONTRACTOR

________________________
Signature

________________________
Printed Name

________________________
Title

________________________
Date

FOR VEIC

________________________
Signature

________________________
Printed Name

________________________
Title

________________________
Date
Attachment A

Services and Statement of Work for Work to be Performed by the CONTRACTOR for VEIC

[A detailed scope of work should be provided here. At a minimum it should contain all deliverables to be provided and a completed schedule for all work to be performed.]