TECHNICAL PROPOSAL OUTLINE

Business Intelligence and Data Warehouse Tools and Solutions

ITN-DOT-15/16-9053-SJ
TECHNICAL PROPOSAL OUTLINE

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TECHNICAL PROPOSAL DETAILS

This section provides a series of questions that must be answered and responses that must be provided.

1.1 TAB 1: Executive Overview (3 to 5 Pages)

The Executive Overview shall be organized by the purposes stated in Exhibit A: Business Intelligence/Data Warehouse (BI/DW) Scope of Services and shall include the following:

1. A summary demonstrating an understanding of the BI/DW Tools and Solutions Project, the State of Florida’s Department of Transportation (FDOT, Department) needs and business objectives, and key project milestones as specified in this ITN and its supporting documents.

2. A description of any sub-contractors being proposed. A prime vendor may partner with other sub-vendors (subcontractors) as needed. However, for each response to this ITN, the response should represent an integrated tool suite and solutions approach to serve the overall needs of FDOT as described within this ITN.

3. The name and brief description of the vendor’s recommended BI/DW tools and technologies.

4. A description of the vendor’s approach for implementing the recommended BI/DW tools, technologies and solutions to meet the requirements outlined.

5. A summary demonstrating an understanding of the Department’s Operations & Maintenance (O&M) requirements.

1.2 TAB 2: Project Approach and Methodology (5 to 10 Pages)

Vendor approaches shall comply with the Contract Objectives/Requirements Overview outlined in Exhibit A: BI/DW Scope of Services. This initial work is considered Release 1, and subsequent phases will be based on the Department’s needs and funding availability.

The vendor shall articulate its understanding of the Department’s business and technology needs and environments, processes, and objectives related to the project as detailed in this ITN, its appendices, and referenced supporting documentation. The vendor shall, at a minimum, describe the proposed approach for accomplishing the tasks described in Exhibit A: BI/DW Scope of Services of this ITN. Include, where appropriate, a description of how the proposed approach will encourage participation, seek input, and build consensus among all stakeholders.

The vendor shall include the following sub-sections within Tab 2:

1.2.1 Approach

Describe the overall approach for accomplishing the tasks described in Exhibit A: BI/DW Scope of Services. The approach must include a discussion of how the vendor will address the phased rollout of the solution and the related services for each phase including both BI/DW Tools and Solutions.

1.2.2 Project Management Plan

The Department will be responsible for creating the Project Management Plan (PMP). The vendor’s responsibility will be to collaborate with DOT and provide input into the Project Management Plan. The information provided in this section from the vendor will be used in the development of the PMP.
Describe the proposed approach and methodology for project planning including project execution, monitoring, controlling, and closing that will guide the decision making that occurs throughout the project. Include a definition of the approach and methodology for each of the project management processes defined in Exhibit A: BI/DW Scope of Services. Identify any industry standards that will be recommended to be incorporated into the project management approach. Describe the benefits and risks associated with the methodology.

The following information must be covered in this section:

- Administration and Management
  - Project Organization
  - Scope Management
  - Requirements Management
  - Integration Management
  - Time Management
  - Cost Management
  - Schedule Management
  - Stakeholder Management
  - Project Change Management
  - Risk Management
  - Issue Management
  - Quality Management
  - Communication Management
  - Resource Management

### 1.2.3 High-level Project Schedule

This section should reflect all of the work associated with delivering the project on time, based on the Vendor’s chosen software/system development methodology. Provide a high level project schedule with recommended resources. This schedule should provide the high level tasks and activities required to complete the solution. Describe the standard used for defining the software development and maintenance tasks.

- Includes the Phase Gate Reviews as defined in Exhibit A: BI/DW Scope of Services.
- Lists the planned start date(s) and planned end date(s) for each deliverable or activity and the estimated resources (both Vendor and FDOT) required for each task.
- Show all costs (Software, Hardware, Solutions, Maintenance, etc.) from the Cost Reply Form as it applies to this High-level project schedule for each solution.
- The preferred project schedule format is Microsoft Project 2013 format and PDF file formats. Excel format is optional. The naming convention of both files must reflect version number.

### 1.2.4 Approach Outcomes
The Department seeks to implement BI/DW Tools and Solutions as outlined in Exhibit A: BI/DW Scope of Services. The vendor shall detail how the solution and delivery approach will help achieve the aforementioned outcomes for the Department, in providing solution details and specific examples of previous implementations.

In addition to the requirement the vendor’s solution is able to perform the desired outcomes, the vendor’s experience in implementing systems similar in nature to the BI/DW Tools and Solutions Project is of high importance.

In describing previous project experience, the vendor shall document in detail:

- Similar installations, including:
  - Transportation-related organizations
  - Integration of the recommended BI/DW Tools
  - Size/volume of data and transactions
  - Number of implementations for similar projects, including:
    - Conversions
    - Training
- Number of data sources addressed
- Specific examples of the integration/interconnection of data sources and resolutions
- Experience of key team members with the solution

The identified solution capabilities and the related vendor experience will act as a starting point during negotiations.

1.3 TAB 3: Solution Description (50 to 75 Pages)

To facilitate the response evaluation process, vendors should format their responses to the requirements below in a way that is clearly delineated for each of these areas. These sections shall cover the following:

1.3.1 Solution Services (General)

1. Provide overview of the proposed solution.
2. Describe how the proposed solution provides flexibility in day-to-day operations.
3. Describe how business and IT will interact with the system to obtain information and services.
4. Describe how the proposed solution enables all users to interact, collaborate, and communicate to achieve the goals and objectives of FDOT.
5. Describe how the solution will allow better interaction of employees across the seven District Offices, Florida’s Turnpike Enterprise (FTE, Turnpike), and Central Office.
6. Describe how the solution can provide a common platform of information/data across the state.
7. Describe how the solution will overcome limited bandwidth capacity at FDOT for the BI/DW tools recommended, enabling high performance of the proposed solution.
8. Describe how the proposed solution is innovative and positions the Department for the future.

9. Describe how the proposed solution aligns to FDOT’s strategic goals and objectives.

10. Describe how the proposed solution identifies data redundancy throughout FDOT.

11. Describe how the tools and solution will interface with SharePoint lists and document libraries.

12. Describe how your tools and solutions can be used on a mobile platform such as a smartphone.

13. Describe sustainability of proposed solutions (in particular as it relates to turnover or change in administration/contract).

14. Describe your approach for data cleansing and ensuring data quality as part of your solution. Please describe tools and approach for this.

15. Describe how your recommended tools are integrated. For example:
   a. Describe how your reporting tool integrates with your metadata tool.
   b. Describe how your Extract, Transform, and Load (ETL) tool integrates with your Master Data Management (MDM) tool and your Metadata tool.

16. Describe the types of data that can be mastered as part of your MDM tools and solutions. (e.g., Citizens, Contracts, Vendors, Employees, etc.).

17. Describe any transportation industry best practice data models you will be using or recommend.

18. Describe similar implementation experience you have in public sector or transportation agencies.

19. What experience do you have implementing your recommended set of BI/DW tools with each other in an integrated environment? For example, how does your recommended reporting tool integrate with your recommended metadata tool; how does your ETL tool integrate with your reporting tool, etc.?

20. Please describe how your tools and solutions integrate with GIS related systems.

21. Please describe how your tools and solutions will eliminate, or at minimum, reduce the perceived need to have data duplicated at the Districts, when the original “master” data can be accessed within Central Office systems and databases. (Note: Today, the perceived need for this redundant data at the District office is most often driven by performance issues and the District offices not being able to access the information on a timely manner when they need it.)

1.3.2 Solution Services (Details)

This section relates to the design and implementation of the solution the tools will provide to FDOT (i.e. number and type of reports provided, dashboards, Ex: ETL processes, etc. for the Business Data systems being implemented by the vendor).

Please describe how your proposed solution, using your proposed toolset for FDOT, would implement, handle, or support the criteria listed below.

1. Explain your proposed approach to implement the solution to integrate the BI/DW tools with FDOT systems in the following areas:
a. Mappings to FDOT infrastructure
b. Mappings to FDOT data sources (including databases, flat files, as well as SharePoint lists and document libraries.

2. Identify any additional software (database, connectivity, end user, etc.) required to provide support for the Reports, ETL transactions, Metadata, and MDM tools, which are part of the proposed solution to be used by FDOT staff in their day-to-day activities. This may include, but not be limited to, database software required with minimum version, server software required with minimum version, any client level software required, etc. Any recommended tools, software, hardware will have to be in compliance/adherence be verified to procurement rules. Please list the following:
   a. Tool or software name
   b. Versions
   c. Capabilities

3. Identify any additional hardware required (servers, UPS, etc.) to provide support for the Reports, ETL transactions, Metadata, and MDM tools, which are part of the proposed solution to be used by FDOT staff in their day-to-day activities.
   a. Tool name
   b. Versions
   c. Capabilities
   d. Database space requirements and growth rate by year
   e. Server space requirements

4. Please explain the integration of the recommended tools and the schedule of implementation in terms of the following criteria:
   a. Length of time for FDOT EDMS integration
   b. Length of time for GIS integration
   c. Length of time for integration with DB2 for z/OS
   d. Length of time for integration with Oracle
   e. Length of time for integration with SQL Server

5. Please explain the level of effort and length of time required for the following steps:
   a. To install and configure each piece of the solution
   b. To support connectivity of users
   c. To maintain tool integration with patches
   d. To ensure optimal usability
   e. To ensure fully integrated business information access

6. Explain how your team will achieve redundant data protection, backup data, information, reports, procedures, and process flows of:
   a. FDOT data
   b. Proposed solution software
c. Data for the solution implementation

d. Archival access

7. Provide references and examples where your firm served as prime or secondary vendor for work integrating these BI/DW tools in similar fashion for other clients.
   a. Have you implemented at Public Sector agencies?
   b. Have you worked as a Prime?
   c. Specific references for all parts of the solution
   d. Both business and technical support references
   e. Collaboration with stakeholders
   f. End user coordination

8. Provide details on training of FDOT business users and technical personnel on the solution services you will provide. Include details on the following:
   a. Technical installation and maintenance level training
   b. Solution capabilities training
   c. Business utilization level training

9. Provide cost related information in the following areas for the proposed solution:
   a. Overall cost
   b. Cost per phase
   c. Cost of individual tool solution implementation

10. List and explain the known / expected limitations of the recommended solutions approach

11. Describe the security capabilities of the integrated solution
   a. Security required for technical installation and maintenance for phased implementation
   b. Security required for administration of business users
   c. Authorization gradients for solution administration
   d. Specifics to how solution authentication and tool authority is managed
   e. Specifics to how confidential information is managed

12. Describe the security gaps of the integrated solution

13. List and explain the following:
   a. Data conversion plan
   b. Schedule
   c. Costs

14. List and explain the following in regards to training:
   a. Training plan
   b. Schedule
c. Costs per session and/or training seat

### 1.3.3 Technical Description (General)

1. Provide a description of the general system architecture of the proposed solution. Describe the benefits of this system architecture and how it supports the objectives of the proposed solution.

2. Provide a detailed description of the technical architecture for the proposed solution. Describe the benefits of this technical architecture and how it supports the objectives of the proposed solution.

3. From a technical perspective, provide a detailed description of how the proposed solution will be phased into production and how it will integrate with the existing Department systems during each phase.

4. From a technical perspective, describe how the proposed solution will satisfy the functional requirements of the proposed solution, as specified in the Exhibit A: BI/DW Scope of Services.

5. From a technical perspective, describe how the proposed solution will satisfy the needs specified in Exhibit A: BI/DW Scope of Services.

6. Describe the reliability, availability, and disaster recovery capabilities of the proposed solution.

7. For the BI/DW tools within the proposed solution, describe the proposed approach and strategy of handling necessary customizations and integration of the BI/DW tools to support the requirements without compromising the architecture or maintenance of the products.

8. Describe the integration strategy for the proposed solution with the current Department systems during the phased implementation.

9. Describe the external interface strategy for the proposed solution.

10. Describe any assumptions about modifications that will need to be made to the current Department systems.

11. Describe how the solution will scale to meet the Florida Department of Transportation's transaction levels.

12. Provide a detailed list of hardware required for the proposed solution. If the hardware listed is proprietary, the item must be identified as such. The response, at a minimum, must include descriptions and configurations for the following (if proposed):

   a. Servers
   b. Workstations
   c. Storage
   d. Uninterruptible Power Supply (UPS)
   e. Printers and peripheral equipment
   f. Network
   g. Cloud based solutions
   h. Other required hardware for the proposed solution
13. Provide a detailed list of the software required for the proposed solution. The response, at a minimum, must include descriptions for the following (if proposed):
   a. Proposed BI/DW Tools software
   b. Operating system software (for both servers and workstations)
   c. Network software
   d. Network management software
   e. Data management software
   f. Database management software
   g. System software tools
   h. Development tools
   i. Security and control software
   j. Version control software
   k. Business rule management software
   l. Other required software for the proposed solution

1.3.4 Technical Description (Details)
This section relates to the selection of the tools and how they will be incorporated into the FDOT environment. Please describe how your proposed solution for FDOT would accomplish the following:

1. FDOT has 9 main locations (7 Districts, Turnpike, and Central Office, as well as multiple satellite offices). How and where would your solution be installed?
   a. Single point over multiple installs
   b. Connectivity requirements for installation
   c. Authorization requirements for installation

2. For each BI/DW tool which is part of your proposed solution, please provide the following information:
   a. Tool name
   b. Versions
   c. Capabilities
   d. Tool vendor information

3. For each tool in the proposed solution, explain how you have previously integrated these tools to provide an overall integrated solution.

4. For each tool in the proposed solution, provide the following information:
   a. List of system, configuration, and support software needs
   b. Known and/or expected limitations or non-capabilities
   c. Known and/or expected constraints

5. For each tool in the proposed solution, describe the integration between each tool to the other tools
a. Configuration management constraints
b. Customization requirements for tool integration
c. Authorization requirements for tool integration

6. For each tool in proposed solution, describe the integration of each tool with FDOT’s systems and tools including, but not limited to the following:
   a. Leverage FDOT’s existing documented metadata
      i. MDM tool shall leverage CA metadata rules
      ii. Metadata tool shall leverage CA metadata
   b. Leverage existing FDOT EDMS service
   c. Leverage existing GIS framework
   d. Must span all database platforms used by FDOT (Includes DB2 for z/OS, Oracle, and SQL Server, Access)
      i. ETL tool can connect to and interface with DB2 for z/OS
      ii. ETL tool can connect to and interface with SQL Server
      iii. ETL tool can connect to and interface with Oracle
      iv. ETL tool can connect to and interface with Access
      v. ETL tool can connect to and interface with any other database platforms in FDOT (SharePoint, MySQL, NoSQL, etc.)
      vi. Reporting tool can connect to and use data residing in DB2 for z/OS
      vii. Reporting tool can connect to and use data residing in SQL Server
      viii. Reporting tool can connect to and use data residing in Oracle
      ix. Reporting tool can connect to and use data residing in Access
      x. Reporting tool can connect to and use data residing in other database platforms in FDOT (SharePoint, MySQL, NoSQL, etc.)
   e. Consume FDOT based services
      i. Metadata tool can consume EDMS service metadata
      ii. Metadata tool can connect to and use GIS metadata

7. Once implemented, how will FDOT teams access the tools?
   a. Specify levels of access and how controlled
   b. Breakdown of access controls
   c. Ease of authentication and authorization method
   d. Integration into existing FL DOT security configurations

8. For the proposed solution, describe the integration limitations with FDOT’s systems and tools
   a. Supported configuration customizations
   b. Infrastructure support limitations
c. Operating systems:
   i. Unix/Linux
   ii. WIN for Servers
   iii. z/OS
   iv. WIN Client

d. Database platforms:
   i. DB2 for z/OS
   ii. SQL Server
   iii. Oracle
   iv. Access
   v. Other database platforms in FDOT (MySQL, NoSQL, etc.)
   vi. For the proposed solution describe the level of effort required in the following areas:
      1. To install and configure each piece of the solution
      2. To support connectivity of users
      3. To maintain tool integration with patches
      4. To ensure optimal usability
      5. To ensure fully integrated business information access

9. Please provide details on skillsets required, amount of training needed, and length of training for FDOT technical personnel in the areas listed below. Include details on the type of, location, and length of training for each item listed:
   a. Solution configuration training
   b. Technical installation and maintenance level training
   c. Business utilization level training
   d. Costs per session and/or training seat

10. Describe the security capabilities of the tools proposed:
   a. Security required for technical installation and maintenance
   b. Security required for administration of business users
   c. Authorization gradients for restricted and confidential data
   d. Specifics about how authentication and tool authority are managed
   e. Specifics about how confidential information is managed

11. Describe the security features and any known gaps of the tools proposed.

12. Who is the point of contact, overseer, and project manager for the implementation of the tools’ integration?

13. Describe the mechanism for how public users can access the metadata solution once implemented.
14. Please list and provide detailed information for any additional software required to support the BI/DW tools solution your company proposes.
   a. Tool name
   b. Versions
   c. Capabilities
   d. Database software required with minimum version
   e. Server software required with minimum version
   f. Any client level software required

15. Please list and provide detailed information for any additional hardware required (servers, UPS, etc.).
   a. Database space requirements and growth rate by year
   b. Server space requirements
   c. Bandwidth requirements

16. Please list and provide an alternative implementation plan in which tools might become available and implemented at different times.

17. Please provide cost related details in the following areas:
   a. Cost per implementation phase
   b. Cost of individual tool implementation
   c. Cost of warranty period
   d. Cost of software maintenance
   e. Cost of technical support resources

1.3.5 Tools and Solutions DDI, Integration, Test, and Implementation

For all implementation and BI/DW tool integration work required, please describe the following:

1. The proposed system development lifecycle (SDLC) methodology that supports the requirements. If iterative methodologies are expected to be used, please describe the approach in detail.
2. The proposed requirements elaboration approach and methodology
3. The proposed reports development approach and methodology
4. The proposed master test plan approach and methodology
5. The proposed functional design approach and methodology
6. The proposed technical design approach and methodology
7. The proposed FDOT systems interface design and implementation approach and methodology
8. The proposed BI/DW tool integration and unit test approach and methodology
9. The proposed location for software (BI/DW Tools) integration and development activities
10. The proposed BI/DW tool system integration testing approach and methodology
11. The proposed user acceptance testing approach and methodology
12. The proposed data conversion approach and methodology
13. The proposed hardware installation approach and physical installation location
14. The proposed end-user training approach and methodology
15. The proposed approach and methodology for the development of user documentation.
16. The proposed list of all deliverables associated with the proposed project approach by SDLC phase.
17. The proposed set of service level agreements (SLA). The formulation of SLAs and associated liquidated damages for inclusion in the contract will be handled during contract negotiations.

1.3.6 Warranty, Maintenance, and Operations
1. Describe the proposed approach for providing warranty, maintenance, and operations services in support of the system.
2. Describe the skillsets, training, and technologies needed for Department staff to maintain the proposed solution.
3. Detail the proposed approach for transferring the solution to the Department or another vendor.
4. Describe the proposed approach to handle version upgrades during implementation.

1.3.7 Solution Differentiators
Please articulate any value added differentiators related to the proposed solution, beyond those previously outlined by the vendor that may provide additional benefits to the Department. Describe and clearly label any value added technological differentiators offered to the Department. Although the Department has provided requirements for vendors, these are not intended to limit the vendor’s differentiators or creativity in preparing a response that provides the Department the best solution. Innovative ideas, product offerings, and new concepts, other than those presented in this Invitation to Negotiate, will be considered.

1.4 TAB 4: O&M Approach and Methodology (10 to 25 Pages)
The vendor shall demonstrate its understanding of the Department’s business needs, processes, and objectives related to BI/DW TOOLS and SOLUTIONS O&M, as detailed in the Operations and Maintenance Performance Periods and Operations Transition (if needed).

1. Describe the overall approach.
2. Provide a high level project schedule with recommended resources. This schedule should provide the high level tasks and activities required to support the solution.

1.5 TAB 5: Company Profile and Prior Experience (10 to 15 Pages)

1.5.1 Vendor’s Company History and Experience
This section shall be organized by the purposes stated in Exhibit A: BI/DW Scope of Services and shall include the following sections:

1. The vendor must describe its experience implementing similar solutions as described in the Exhibit A: BI/DW Scope of Services.

2. The vendor must describe its experience implementing the recommended BI/DW tool set at prior companies.

3. Experience shown should be work done by the individuals who will be assigned to this project as well as the overall experience of the company. State whether the vendor was the prime vendor or a subcontractor and whether they worked in cooperation with a subcontractor. Where applicable, clearly note project experience which included individuals who will be assigned to this project and their role on the past project. Provide a detailed description of any work to be subcontracted with information describing the qualifications and relevant experience of any proposed subcontractors.

4. It is important to demonstrate both vendor experience and the experience of the individuals who will be assigned to this contract. It is also important to demonstrate the experience of any subcontractors proposed for this work as well as the vendor’s experience in teaming with this subcontractor.

In determining vendor responsibility, the Department may consider any information or evidence which comes to its attention and which reflects upon a vendor’s capability to fully perform the contract requirements and/or the vendor’s demonstration of the level of integrity and reliability which the Department determines to be required to assure performance of the contract.

1.5.2 Company Profile

Provide the requested information below which will demonstrate the vendor’s and subcontractor(s)’s ability to successfully complete the work described in this ITN and its appendices, attachments, exhibits, and referenced supporting documentation. The vendor’s and any proposed subcontractor(s)’s information shall be shown separately.

Specifically, the vendor and its subcontractor(s) must provide:

1. Full, legal name
2. Federal Employer Identification Number
3. Proof of legal entity and authorization to do business with the State of Florida
4. Country and state of incorporation
5. Principal place of business
6. Description of the vendor’s organization, including number of years in business, subsidiaries, parent corporations, officers; include organization charts and details concerning the number of facilities by geographic location
7. Brief description of the vendor’s principal type of business and history and what uniquely qualifies the vendor for this project
8. Statement of whether the vendor has filed for bankruptcy protection in the past five (5) years or is currently in the process of filing or planning to file for bankruptcy protection or financial restructuring or refinancing. If so provide court and case number
9. Identification of any potential or actual conflicts of interest that might arise for the vendor as a result of contract award to the vendor, and describe in detail the plan to eliminate or mitigate them. Address both personal and organizational conflicts

The following specifically apply to the prime vendor and should be addressed as such:

1. Names and addresses of all affiliated or related companies, partnerships, or associations (including subcontractor, if any) and a brief description of their relationship to the vendor

2. If proposing to use any subcontractors to perform the work described in this ITN:
   i. Provide a detailed description of the vendor’s experience as a prime vendor in managing subcontractors and how they plan to manage and coordinate any proposed subcontractors.
   ii. Provide a detailed description of the vendor’s previous project experience with each subcontractor and how the subcontractor will be used on this project. If this would be the first joint venture with the proposed subcontractor(s), explain why the subcontractor was selected for this project.
   iii. Provide a detailed description of the vendor’s previous O&M experience with each subcontractor and how the subcontractor will be used on this effort. If this would be the first O&M joint venture with the proposed subcontractor(s), explain why the subcontractor was selected.

3. A detailed description of any and all contracts or agreements that have already been entered into with a subcontractor to provide goods or services under any contract related to:
   a. The work described in this ITN (provide copies of the contract(s) or agreement(s) with the subcontractor, signed by an officer representing each party)

1.6 TAB 6: Personnel

This section shall be organized by the purposes stated in Exhibit A: BI/DW Scope of Services. This section should cover personnel for both initial development as well as ongoing Operations and Maintenance of the solutions.

The vendor’s response must provide information demonstrating the vendor has the personnel with the experience to provide the BI/DW TOOLS and SOLUTIONS requested in this ITN. A concise, but thorough, description of relevant experience for each individual of the proposed project team is desired. If the vendor is proposing subcontractors, then the vendor’s and the proposed subcontractor(s)’s information shall be provided separately.

This list must cover vendor resources and any subcontractor resources.

Specifically, the vendor and its subcontractor(s) must provide:

1. A project organization chart(s) including all team members’ names and roles within the project for the DDI (Design, Development, and Implementation), Warranty, and O&M Performance Periods.

2. A list of personnel (team members) that are being proposed. Please provide your response to personnel within the FDOT-ROADS-BI-DW-ITN-Personnel spreadsheet, which can be downloaded from this [link](#).

The following is an example of the information being requested:
The vendor response must include a project manager who is Project Management Professional® (PMP®) certified.

The Department reserves the right to request references for each proposed member of the project team, including subcontractors.

The vendor shall describe its plan for submitting verification that all personnel, including subcontractor(s) personnel, assigned to this project must have successfully completed a background-screening that is equivalent to a Level Two (2) screening standard specified in Section 435.04, F.S.

The vendor and subcontractor(s) must confirm that personnel assigned to work on this project are free from any conflict of interest with the Department prior to assignment to this project.