



Request for Proposals

PREPARED BY:

Regional Income Tax Agency
10107 Brecksville Road, Brecksville, OH 44141

PROJECT TITLE:

Oracle Siebel Upgrade

ISSUED DATE:

April 25, 2024

RESPONSES DUE DATE:

5:00 p.m. E.S.T., May 24, 2024

**REGIONAL INCOME TAX AGENCY
Request for Proposal**

Oracle Siebel Upgrade

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Letter from the Executive Director

April 25, 2024

The Regional Income Tax Agency (RITA, the Agency) is seeking proposals for professional services to assist in performing an upgrade to the latest supported and on-premise version of Oracle's Siebel CRM Software.

Proposals are to be submitted electronically to RFP-IS@ritaohio.com no later than 5:00 p.m. E.S.T., May 24, 2024.

If your firm is interested in submitting a proposal, please request a Mutual Non-Disclosure Agreement and return to Bob Kelley, IT Operations Manager, at RFP-IS@ritaohio.com.

Upon successful execution of the Mutual Non-Disclosure Agreement, an Excel spreadsheet to enter answers to questions and the technical addendum containing information on RITA's existing Oracle Siebel CRM system will be provided.

Potential vendors may direct questions or requests for clarification to Bob Kelley at RFP-IS@ritaohio.com through 12:00 p.m. E.S.T., on May 7, 2024. A copy of the questions and RITA's responses will be provided to each party that has executed a Non-Disclosure Agreement, without identifying the source of the question or request. To the extent possible, you are asked to compile your questions and requests and submit them all at one time.

Please be aware that the Agency reserves the right to reject any and all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency deems to be in the best interest of the Agency.

Cordially,

Amy L. Arrighi
Executive Director

RFP Introduction

The Regional Income Tax Agency (RITA, the Agency) is a governmental entity established to administer and collect local income taxes for political subdivisions. As an agent for its municipalities, RITA provides substantial financial services to its members. Municipal income tax is collected from individuals and/or employers withholding on salaries, wages, commissions, fees and other forms of compensation. The tax is also collected from business entities based on net profits.

As of 2023, there are over 400 taxing jurisdictions in 80 counties served by the Agency (just over 50% of all taxing jurisdictions in Ohio with an income tax) and total annual tax collections exceed \$2.0 billion.

RITA is soliciting proposals for professional services from qualified vendors to assist in performing an upgrade to the latest supported and on-premise version of Oracle's Siebel CRM software. The Agency is seeking vendors with an expertise on the Oracle Siebel platform, have expert level engineers on staff, and who have a strong track record in Oracle Siebel Platform upgrades. The chosen vendor will work under the guidance of RITA personnel to complete the installation.

RITA intends to award a contract to the most responsive and responsible vendor as soon as practical, after review of the proposals. The project will start no earlier than July 1, 2024.

The Agency is not responsible for any costs incurred by the respondent in preparation of a proposal. RITA reserves the right to negotiate with vendors submitting proposals in order to obtain the most favorable terms, conditions and pricing for the Agency as determined by the Agency in its sole discretion. Also, as deemed in the best interest of the Agency by the Board of Trustees, RITA reserves the right to reject any or all parts of the proposals.

Proposal Responses

Proposals must be submitted using both a statement of work (SOW) and by completing the applicable sections of the provided excel sheet to address the requirements in sections I-III below. The SOW should contain a narrative from the vendor outlining their approach to implementing this project for RITA. All proposals should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely.

It is more desirable to give additional information than less when the answer could be misinterpreted. There should be no additional attachments, enclosures, or exhibits other than those considered by the proposer to be essential to a complete understanding of the proposal submitted.

The SOW, all required documents outlined below, and additional documents provided as part of the vendors response will be included as part of RITA's contract with the vendor.

Section I – Qualifications & Experience

The following items must be provided in the SOW:

1. Describe your firm's experience in completing upgrades to the technology outlined in this RFP. Include in your response the number of Oracle Siebel CRM upgrade projects, similar to this one, that are performed by your firm annually.
2. Provide a list of customers/references that would be similar in size or industry to our account for which your firm has completed similar projects.
3. Provide a brief resume and/or bio along with the years of experience that the resource(s) who will be assigned to the project have in upgrading Oracle Siebel CRM systems.

Section II – Implementation, Testing, Support

The following items must be provided in the SOW:

1. Provide a project overview outlining how your firm will approach this project based upon the technical information provided by RITA in the RFP Addendum.
2. Provide a project plan as a separate document or within the SOW that contains the following:
 - a. The estimated start date of the project upon your firm and RITA signing the project contract.
 - b. A list of assumptions and responsibilities for both your firm and RITA.
 - c. A timeline with tasks that accurately depicts how the upgrade will be executed. The plan should be accurate enough that only the starting date of the project needs to be changed upon an agreed to start date.
 - d. An explanation how the project will be successfully executed to reduce any production downtime.
 - e. For planning purposes, RITA typically does not deploy major system upgrades during the time frames from March 1st through April 30th and from September 15th through October 15th each calendar year.

Responses to the following items must be provided in the Microsoft Excel spreadsheet:

1. Testing and Go-live Support:
 - a. RITA expects the vendor to provide basic functionality testing as part of delivering the system upgrade. All features should work at a basic level before the system is turned over to RITA for more thorough testing.
 - b. RITA requires the vendor to provide support during user acceptance testing and for the vendor to remediate all issues prior to go-live in production and to provide 24x7 go-live support for all phases. All go-live activities will be planned, coordinated and aligned with RITA established change management processes. This includes weekends and any work performed after normal business hours.

2. Training:
 - a. RITA requires training for its system administrators' team (4 people) and configuration management team (3 people) on the version of Siebel CRM being installed as part of the upgrade.
3. Data Governance – Retention & Purge:
 - a. In a post upgrade phase, RITA requires assistance in devising a data governance plan for the Siebel system that will allow the Agency to enforce its records retentions policy and purge any data no longer required for business use. Vendor responses should include this as a separate line item and a separate cost in their response, along with explanation of how the process will work.
4. Ongoing application and upgrade support:
 - a. RITA desires to engage the successful vendor in a support contract to provide break fix application support for up to one year after the upgrade. The start date of this support contract will commence when the upgrade project is determined to be complete by RITA. The support contract must provide a SLA of 24x7 support with a 4-hour response time for critical production issues. The cost and terms for this support contract must be listed as a separate item with a separate cost in the vendors response.

Section III – Cost/Pricing

1. Provide a pricing sheet as a separate Microsoft Excel document that contains the following information:
 - a. A breakdown of the costs by hardware, software, hardware maintenance, software maintenance and professional services.
 - b. For any professional services costs, please provide the number of resource hours by skill set (if more than one) that are required to complete the upgrade and an explanation of why each skill is required for the project.
 - c. List any costs outside of the required resource hours as separate line items with an explanation such as post go-live application support and the requested data governance and purge process.
 - d. All pricing provided must be valid for 60 days.

Proposal Instructions

All proposals must be submitted using a SOW and the provided Microsoft Excel sheet as outlined above in Sections I – III of the Proposal Responses section and submitted electronically to RFP-IS@ritaohio.com.

All proposals must be received by the Executive Director, Regional Income Tax Agency, by 5:00 p.m. E.S.T., May 24, 2024. All Proposals shall be emailed to RFP-IS@ritaohio.com.

It is RITA's intention to enter into a contract as soon as practical after the proposals are evaluated and Board approval is received. The successful vendor shall enter into a contract with the Agency within ten (10) days of the notification of award or as soon as practical thereafter, as determined by RITA. Project implementation is expected to begin no earlier than July 1, 2024.

Proposals will be evaluated on several factors including the degree of fit to the requirements and cost.

The Agency reserves the right to reject any and all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency shall deem to be in the best interest of the Agency. By submitting a proposal, each respondent is ensuring that complete confidentiality of all Agency information will be maintained by all vendor personnel.

By submitting a proposal, each respondent is ensuring that the vendor is an Equal Opportunity Employer and that their employees and applicants for employment are not discriminated against because of their race, color, religion, national origin, disability, age, genetic information, military status or sexual orientation. By signing a contract with RITA, the successful vendor guarantees that they comply, or will comply with the above provision and all other applicable state and federal laws regarding public contract work, and agrees to indemnify and hold the Regional Income Tax Agency harmless from any claims or damages incurred against or by the Regional Income Tax Agency resulting from any non-compliance by the successful vendor.

By submitting a proposal, each respondent is declaring that they are not in arrears to RITA for municipal income taxes or any other obligation to the Agency.