



RFP for Technology Services and Deliverables for Informatica to Oracle Data Integrator (ODI) Migration and Business Intelligence Applications (OBIA) Upgrade

HDC OVERVIEW

HDC is the nation's largest municipal Housing Finance Agency and is charged with helping to finance the creation or preservation of affordable housing for New Yorkers. HDC also serves as a key financing partner in the rehabilitation of our city's public housing stock under the NYCHA Permanent Affordability Commitment Together (PACT) initiative.

Since 2003, HDC has financed more than 210,000 housing units using over \$31 billion in bonds and other debt obligations and provided more than \$3 billion in subsidy from corporate reserves and other available funds held by the corporation. HDC ranks among the nation's top issuers of mortgage revenue bonds for affordable multi-family housing on Thomson Reuter's annual list of multi-family bond issuers. In each of the last five consecutive years, HDC's annual bond issuance has averaged \$2 billion.

Introduction:

The New York City Housing Development Corporation (NYCHDC) is seeking proposals from qualified information technology firms to provide professional services to 1) upgrade Oracle Business Intelligence Applications (OBIA) to a newer version, and 2) migrate custom workflows from Informatica to Oracle Data Integrator (ODI).

NYCHDC presently employs Informatica ETL, running on Oracle Business Intelligence Applications (OBIA) version 7.9 to manage multiple data sources. Additionally, the organization utilizes Oracle Business Intelligence Enterprise Edition (OBIEE) presentation services through Oracle Analytics Server (OAS) within the Oracle Cloud Infrastructure (OCI). Daily workflow scheduling is facilitated by Data Warehouse Administration Console (DAC), overseeing nearly a hundred custom workflows.

Note: Current OBIA 7.9 implementation operates in a decoupled manner, leveraging only the Informatica mappings and workflows stored in the repository for ETL processes. The organization relies on DAC for job orchestration, with no OBIA 7.9 executables installed and the data warehouse tables are loaded daily through this configuration.

Project Scope of Work and expected Deliverables:

The proposed project involves a comprehensive upgrade and migration plan for the New York City Housing Development Corporation (NYCHDC) from Oracle Business Intelligence Applications (OBIA) 7.9 to OBIA 11.1.1.10.3 (or latest supporting version) and migrating custom workflows from Informatica to ODI. This project also involves the migration of Oracle Analytics Server (OAS) into Oracle Analytics Cloud (OAC) within Oracle Cloud Infrastructure (OCI). The project is divided into two phases, each with specific services and deliverables.

Phase 1: Upgrade Migration

1. **Work Plan Creation:** Generate a comprehensive Work Plan that includes the project plan, task list, estimated durations, schedule, task dependencies, risk mitigation strategies, training plan, testing plan, and communication plan.
2. **Upgrade Migration:**
 - a. Conduct workshops to finalize the upgrade strategy, reviewing ETL customizations, configurations, and environment strategy.
 - b. Set up any additional Cloud foundation services for OAC to their existing NYCHDC's OCI tenancy, including networking, security, and access.
 - c. Provision Cloud Native applications and infrastructure within OCI.
 - d. Perform a full installation of OBIA 11.1.1.10.3 (or latest supporting version) in the Development environment, including configuring ODI and provisioning Oracle Analytics Cloud in OCI.
 - e. Unit test the OBIA instance in the Development environment, validating functional configurations and load plans.
3. **OAC Install:**
 - a. Provision the latest version of OAC in Development.
 - b. Configure OAC for Oracle Cloud-based DBCS source database connectivity in OCI.
 - c. Configure OAC security to mirror current production security settings, including enhancements aligned with best practices. For instance, update configuration rules for the keystore to recommended settings.
 - d. Import and validate OAC with out-of-box dashboards.
4. **Production Installation:**
 - a. Install and configure OBIA 11.1.1.10.3 (or latest supporting version) and OAC in the Production environment.
 - b. Migrate and validate ODI and OAC configurations from Development to Production.
5. **Installation Validation Document:** Create a document summarizing the installation and configuration activities.

Phase 2: Customizations

1. **ODI Customizations:**
 - a. Deliver up to twenty five customized ODI mappings, prioritized in collaboration with NYCHDC.

- b. Train NYCHDC ODI developers on developing custom mappings.
2. **OAC Reports:**
 - a. Deliver up to ten customized OAC reports consistent with the chosen ODI mappings.
 - b. Train NYCHDC report developers on creating custom reports.
3. **Testing:**
 - a. Assist with System Integration Testing (SIT) and address identified defects.
 - b. Provide assistance during User Acceptance Testing (UAT) and evaluate go-live readiness.
4. **Migration and Cutover Support:**
 - a. Assist with cutover activities and provide post-production support.
 - b. Monitor for any inconsistent behavior and address issues.
5. **Completion Document:** Create a document summarizing the activities related to customizations.

Overall, the project aims to seamlessly upgrade and migrate NYCHDC's BI systems while ensuring the functionality, security, and customizations meet the organization's requirements. The phased approach allows for a systematic implementation, testing, and validation of the upgraded systems.

B. Deliverables:

1. Installation Validation Document:

- **Deliverable Description:** Provides a comprehensive summary of the activities involved in the installation and configuration processes, ensuring that the setup adheres to the defined standards and requirements.

2. Customizations Completion Document:

- **Deliverable Description:** Provide documentation that encapsulates the details of the customizations implemented during Phase 2. It serves as a comprehensive record of the tailored ODI mappings and OAC reports, providing insights into the added functionalities and configurations.

C. Proposal Requirements

NYC HDC is looking to review proposals from potential vendors that include the following requirements.

Please include the following in your proposal response:

- Overview of your company
- Overview of how you will meet our objectives
- Explanation of your proposed platform

- Plan for integration with existing systems
- Details about your team
- References
- Any key differentiators about you
- Terms and conditions

D. RFP and Project Timeline

NYC HDC anticipates the vendor proposal and selection process to proceed along the following approximate timeframes:

- February 12, 2024: RFP Issued
- February 23, 2024: **All written questions are due by end of day February 23, 2024.** Email questions to HDCITBIDS@nychdc.com, Madhavi Kulkarni, VP Enterprise Architecture, at mkulkarni@nychdc.com and Melissa Barkan, Special Counsel, at mbarkan@nychdc.com.
- March 4-8th, 2024: HDC anticipates scheduling an informational session with prospective respondents the week of March 4th. Contact HDCITBIDS@nychdc.com to be included in the info session if one is scheduled.
- March 15, 2024: All submissions are due by 6pm on March 15, 2024.
- March 18 - April 2024: Vendor Presentations and Selection
- May 2024: Contract Finalization
- June – August 2024: Implementation in test
- September – November 2024: Production Migration

E. Submission

- Participating vendors will be required to submit one (1) electronic copy of their proposals, along with the Appendices and the attached Doing Business Data Form pursuant to Local Law 34. The form can be accessed here: <https://www.nychdc.com/sites/default/files/2020-10/Doing%20Business%20Data%20Form%20-%20Standard%202018.pdf>
- Any questions must be submitted via email to mkulkarni@nychdc.com
- Submissions are due by 6:00 PM on March 15th, 2024. Proposals received after 6:00 PM on March 15th, 2024, will be deemed late and will not be considered.
- Any inquiries to this RFP can be submitted via email to both Madhavi Kulkarni, VP Enterprise Architecture, at mkulkarni@nychdc.com, and Melissa Barkan, Special Counsel, at mbarkan@nychdc.com
- Contact HDC to get details on the info session.

- After a review of the proposals, HDC will select those vendors who will be invited to make a presentation to HDC staff. It is anticipated that vendor presentations will be conducted starting no earlier than March 18 and continuing into April if needed, as in person or online meetings. Presentations by the selected vendors will be limited to a maximum of 90 minutes. The final selection of a vendor will be made after analyzing the qualifications of the respondents and their presentations.

Appendix 1

1. Equal Employment

If any, provide a copy of the firm's most recent Employer Information Report EEO-1 and include as Attachment to the Proposal. Please state how many women and minorities work in your firm.

2. Minority and Women Owned Business Enterprise (MWBE)

NYC HDC is dedicated to furthering the participation of minority and women-owned businesses in its work. All respondents are urged to include in their proposals methods for facilitating the participation in the project of businesses that have been certified by the New York City Department of Small Business Services ("SBS") as women or minority owned. This can take any form a Respondent considers appropriate including, but not limited to, proposals intended to ensure the utilization of certified minority and women-owned businesses as subcontractors or as joint-venture partners. In addition, proposals from minority and women-owned respondents are encouraged.

3. New York City Location

a) State whether the firm maintains its headquarters, or other offices, in New York City, and the number of the firm's employees who are employed in New York City. Describe the firm's commitment to its location in New York City. Since January 1, 2017, has the firm relocated any employees from offices in New York City to locations outside New York City? Does the firm have any plans to relocate any employees or offices outside of New York City in the next two years?

b) Describe the firm's corporate citizenship and commitment to The City of New York, including local procurement of goods and services, development or participation in internship programs or scholarships, corporate philanthropy, specifically in the areas of housing and community development, and policies with regards to the use of women-owned, minority-owned and small business enterprises.

4. Credit Ratings

If applicable, provide a copy of the firm's most recent credit agency analyses. Include in your response the firm's current ratings. If these ratings have changed in the last three years, please explain in detail the reason for such change.

5. Local Law 34 Compliance:

Pursuant to Local Law 34 of 2007, amending the City's Campaign Finance Law, the City is required to establish a computerized database containing the names of any "Person" that has business dealings with the "City" as such terms are defined in the Local Law. In order for the City to obtain necessary

information to establish the required database, your response to this RFP is required to include a completed Doing Business Data Form (the "Data Form"), which is attached hereto. The Data Form will be submitted to the Mayor's Office of the City of New York (the "City"). If the City determines that your Data Form is not complete, you will be notified by the City and given four (4) calendar days to cure the specified deficiencies. Failure to do so will result in your proposal being deemed incomplete and therefore non-responsive.

APPENDIX 2

The issuance of this Request for Proposal ("RFP"), and the submission of a proposal by the firm or the acceptance of such proposal by HDC, does not obligate HDC in any manner whatsoever. Legal obligations will only arise upon the execution of formal agreements by HDC and the firm selected to render services described herein.

HDC reserves the right to amend, modify, postpone or withdraw this RFP; to waive any requirement of this RFP; to require supplemental statements and information from proposing entities, to accept or reject any or all proposals received as a result of this RFP; to extend the deadline for submission of proposals; to negotiate with any proposing entity which responds to this RFP; to hold discussions with any proposing entity; and to correct deficient proposals which do not completely conform to the instructions given in this RFP. HDC may exercise such rights at any time without notice and without liability to any proposing entity or other parties for their expenses incurred in preparation of the proposal. In its review, HDC may accept a proposal but require modification or negotiation of scope. Although discussions may be conducted with proposing entities submitting acceptable proposals, awards may be made without discussion.

The scope of services described in this RFP provide the most current and accurate descriptions of services sought by HDC. However, at the time contracts are executed, programmatic changes may result in changes to the scope of services.

All documents presented in response to this RFP will become the property of HDC. The Corporation is subject to the New York State Freedom of Information Laws ("FOIL") and as such HDC shall release all records subject to FOIL without notice or consent of responder.

The proposal must disclose any other employment or situation which may create a conflict of interest if your firm were to be selected, including any relationship that the firm or any of its employees may have with HDC. Please describe any such relationship in your proposal, or affirmatively state that no such relationship exists.

Fees and Commissions:

HDC will not pay any fees or commissions for the proposal requested in this RFP.

All implementation services must be performed within the United States.