

Offer for

Illinois State Board of Education

Illinois Longitudinal Data System -
Business/Data Analysts

Ref# 22038788

Proposal By



Packet 1

TABLE OF CONTENTS

Proposal Specification Checklist.....	4
Offeror's Proposed Solution to Meet the State's Requirements	6
About BIS, Inc.....	7
Business/Data Analyst Candidate #1 – Matt Fuiten	9
Qualification Summary	10
Resume	14
Candidate References	18
Business/Data Analyst Candidate #2 – Josh Wright	19
Qualification Summary	20
Resume	25
Candidate References	28
Milestones and Deliverables	29
Transportation and Delivery Terms	32
Where Services Are to Be Performed	34

PROPOSAL SPECIFICATION CHECKLIST

10/26/2016

CANDIDATE – MATT FUITEN

Responsive Category	Program Specifications	Vendor's Proposal Page Ref.
Qualifications (Business/Data Analyst)	The degree to which the candidate demonstrates expertise conducting statistical analyses of data using standard statistical techniques. (125 points)	Page: 10
	The degree to which the candidate demonstrates expertise gathering functional specification requirements for the development of dashboards and reports. (125 points)	Page: 11
	The degree to which the candidate demonstrates experience working with interactive data visualization products focused on business intelligence such as Microsoft Power BI, Tableau or similar products. (125 points)	Page: 12
	The degree to which the candidate demonstrates experience with management of data to produce accurate and consistent longitudinal datasets. (125 points)	Page: 12
	The degree to which the candidate demonstrates experience using Microsoft SQL Server to model data into datasets for consumption of business intelligence software. (125 points)	Page: 13
	The degree to which the candidate demonstrates experience with data security and privacy by anonymizing datasets. (125 points)	Page: 13

CANDIDATE – JOSH WRIGHT

Responsive Category	Program Specifications	Vendor's Proposal Page Ref.
Qualifications (Business/Data Analyst)	The degree to which the candidate demonstrates expertise conducting statistical analyses of data using standard statistical techniques. (125 points)	Page: 21
	The degree to which the candidate demonstrates expertise gathering functional specification requirements for the development of dashboards and reports. (125 points)	Page: 21
	The degree to which the candidate demonstrates experience working with interactive data visualization products focused on business intelligence such as Microsoft Power BI, Tableau or similar products. (125 points)	Page: 22
	The degree to which the candidate demonstrates experience with management of data to produce accurate and consistent longitudinal datasets. (125 points)	Page: 23
	The degree to which the candidate demonstrates experience using Microsoft SQL Server to model data into datasets for consumption of business intelligence software. (125 points)	Page: 23
	The degree to which the candidate demonstrates experience with data security and privacy by anonymizing datasets. (125 points)	Page: 24

10/26/2016

OFFEROR'S PROPOSED SOLUTION TO MEET THE STATE'S REQUIREMENTS

D.6 – OFFERORS PROPOSED SOLUTION TO MEET THE STATES REQUIREMENTS

ABOUT BIS INC.

BIS Inc. is involved in a variety of business applications. They strive to work closely with clients to determine their needs both known and unknown and develop solutions to real-world business problems. BIS Inc. makes it a point to lead every software project through all lifecycle stages and produce world-class software that exceeds client expectations, increases user experience, decreases help desk volume, and overall delivers return on investment (ROI).

Illinois Corporation – Established 2011

President: Kevin Bowsheer

QUALIFICATIONS

BIS Inc. is involved in every aspect of development, from initial design to maintenance. BIS has evolved with the fast-paced industry and has helped customers break into the mobile sector.

- Web Solutions – VB, C#, MVC, API Technologies
- Desktop solutions – Enterprise level applications
- Mobile Applications – IOS, Android, Windows
- Database Engineering – Design, Performance, Scalability

SPECIALIZED AREAS OF BUSINESS:

- Retirement Systems
- Education
- Insurance
- Analytics
- Finance
- State Government
- GIS Mapping

D.6.1.4 – BIS INC. VENDOR REFERENCES

J.1. Teachers' Retirement System of Illinois

Greg Maynerich - (217) 622-3198 - 2815 West Washington Street, Springfield IL

March 2015

Teacher Election software audit and technical review prior to major board election.

J.2. Midwest Meter Inc.

Joe Morrell – (217) 825-6360 – 200 E. Franklin, Edinburg IL

July 2014-November 2014

IT consulting for tracking/logging GPS locations of installed equipment for clients. This equipment map would be a blueprint for each client's water system. Mobile application would be utilized for GPS blueprinting.

J.3. Village of Dawson - Municipality

Jeremy Nunes – (217) 415-0237 – 109 N. Lewis St, Dawson IL

August 2014 - current

IT consulting for mobile application. 311 logging, road maintenance, property tax management, GIS spatial mapping for utilities.

J.4. Associated Network Partners, Inc

Joe O'Hara – (217) 891-7524 – 3243 S. Meadowbrook Rd, Springfield IL

January 2012 - 2013

General IT consulting and staff augmentation.

10/26/2016

PROPOSED CANDIDATE #1

10/26/2016

PROPOSED CANDIDATE FOR BUSINESS/DATA ANALYST

BIS Inc. presents: Matt Fuiten

BIS Inc. is presenting Matt Fuiten for the position of Business/Data Analyst, a position we believe he is uniquely qualified for due to his strong Business Intelligence and Business Analyst background. Matt has over 5 years of extremely relevant experience earned while working as a Business and Clinical Intelligence Business Analyst 2 (Lead) at Springfield Clinic. During this time, he's had numerous opportunities to work with the Clinic's data to improve their day to day operations.

Most notably, Matt is a high level user of many different business intelligence tools and is certified in Microsoft SQL Server. While at Springfield Clinic, Matt has become the subject matter expert on the usage of Microsoft Power BI. Matt led the feasibility study on multiple BI products where ultimately Power BI was selected. Matt then led the effort to implement, configure, and train staff on the usage of the product. Currently, Matt troubleshoots and responds to any issues that Springfield Clinic may have on Microsoft Power BI. He also uses the tool himself daily to produce reports from Springfield Clinic's Electronic Health Records, and has done so for the past 3 years.

We believe that you will not find a more qualified candidate than Matt Fuiten for the position of Business/Data Analyst at the Illinois State Board of Education. His long list of qualifications include:

- 5 years spent as a Business and Clinical Intelligence Business Analyst 2 (Lead) at Springfield Clinic
- Lead BA on Springfield Clinic's data warehouse project
 - **Star-schema** + traditional
- 5 years of experience with sensitive **PII data**
- 5 years of experience with business intelligence tools such as **Microsoft Power BI**
- Excellent Business Analysis skills in requirements gathering
- Extensive use of **predictive analytics** in evaluating facility management

D.4.1.1.1 - The degree to which the candidate demonstrates expertise conducting statistical analyses of data using standard statistical techniques

Vendor Response:

The candidate has over 5 years of demonstrated expertise conducting statistical analyses of data using standard statistical techniques, earned while working as a Business and Clinical Intelligence Business Analyst 2 (Lead) at Springfield Clinic.

While at Springfield Clinic, Matt worked closely with physicians and their staff to develop numerous systems and dashboards to aid in the care of patients. For example, Matt gathered requirements, designed, produced and tested a system comparing CPT code visits to the national bell curve percentage. This dashboard system allowed providers to see how their coding compared to the national benchmarks.

Matt also was the lead BA on a project where Springfield Clinic did a feasibility study on placing a Prompt Care in Chatham. On this project, Matt first worked with the end users to define the requirements for the project. He then created list of patients that went to a prompt care in the last year and looked at their address using a User Defined Function (UDF) to calculate their geographical location. Matt used this data to produce a report showing the zip codes of patients who visited the various Prompt Care locations in Springfield, and their proximity to the potential site in

10/26/2016

Chatham. By compiling this data into useable reports, along with graphical representation supporting the data, he assisted the Springfield Clinic management team in making a final decision.

Lastly, the candidate worked extensively with Quality Improvement System (QIS) data to help close care gaps for patients. This work effort required Matt to work directly with physicians and other Springfield Clinic staff to elicit requirements and create a QIS data dashboard, and then analyze and present his findings and recommendations to Springfield Clinic management.

D.4.1.1.2 - The degree to which the candidate demonstrates expertise gathering functional specification requirements for the development of dashboards and reports

Vendor Response:

The candidate has over 5 years of experience gathering functional specification requirements for the development of dashboards and reports. As a Business and Clinical Intelligence Business Analyst 2 (Lead) at Springfield Clinic, this is a critical part of Matt's day to day responsibilities.

Matt has become a high level expert at not only eliciting requirements from users on dashboard and report requests, but also asking the right questions of those users to drill down to what they truly need. For example, Matt was recently approached by the Springfield Clinic Privacy department for an audit report. This report was requesting all patients that had a "curtain document" created within a specific time period. Furthermore, the Privacy department also wanted to know if anyone besides the original creator of the document had viewed the "curtain document". Matt first set up a meeting with the user from the Privacy department so that he could better understand the request. Before the meeting, Matt ran the initial report and realized that the data set requested was so large that the Privacy Department wouldn't have much use for the data. Matt then used the meeting to drill down into the request and get more specific parameters from the end user. This allowed him to produce a report that ultimately was much more usable for the Privacy Department.

The candidate also used his requirements gathering skills to assist in an executive level decision regarding the placement of a potential new Springfield Clinic facility. After being contacted by a member of the executive staff, Matt met with them to further define the request and what the desired end result would be. During this meeting, he gathered requirements from the users on what the new facility would be doing. From there, he was able to pull data from all previous Springfield Clinic visits to that type of facility, and determine the patient's zip code. Matt took the results previously mentioned, and then looked at how many of those patients visited the specific facility that is closest to the potential new facility. From those results, the executive staff was able to make a well informed decision on if they should build the new location or not.

D.4.1.1.3 - The degree to which the candidate demonstrates experience working with interactive data visualization products focused on business intelligence such as Microsoft Power BI, Tableau or similar products

Vendor Response:

The candidate presented has become a high level expert in the usage of such business intelligence tools as Microsoft Power BI, Tableau, AHS Precision BI, GE Centricity Precision BI, and a custom BI solution he helped develop for Springfield Clinic. This knowledge was gained while in the role of Business and Clinical Intelligence Business Analyst 2 (Lead).

While at Springfield Clinic, Matt has become the subject matter expert on the usage of Microsoft Power BI. Matt led the feasibility study on multiple BI products where ultimately Power BI was selected. Matt then led the effort to implement, configure, and train staff on the usage of the product. Currently, Matt trouble shoots and responds to any issues that Springfield Clinic may have on Microsoft Power BI. He also uses the tool himself daily to produce reports from Springfield Clinic's Electronic Health Records, and has done so for the past 3 years.

Matt also served as the lead BA on an effort at Springfield Clinic to create their own BI repository, called Health Catalyst. Matt gathered requirements, worked with developers, and provide QA testing on the project. Health Catalyst is still in use today and Matt offers support to end users on a daily basis.

Throughout his time at Springfield Clinic, Matt has also had the opportunity to use other BI products. He has 2 years of experience using AHS Precision BI, which was used to deliver reports to end users for Springfield Clinic's Electronic Health Records. He has over 4 years of experience using GE Centricity Precision BI, which he used to deliver reports from Springfield Clinic's proprietary practice management software. Lastly, Matt has extensive experience with SQL Server Integration Services (SSIS) and SQL Server Reporting Services (SSRS), spending over 5 years with each product performing ETL's, SFTP's, creating dashboards and e-mail reporting.

D.4.1.1.4 - The degree to which the candidate demonstrates experience with management of data to produce accurate and consistent longitudinal datasets

Vendor Response:

The candidate presented has over 5 years of experience with management of datasets to produce accurate and consistent longitudinal datasets, while working both as a Business and Clinical Intelligence Business Analyst 2 (Lead) and an Application Developer at Springfield Clinic.

As an Application Developer at Springfield Clinic, Matt was routinely tasked with creating datasets on both active tables and historical tables. These datasets were then used to report on such Springfield Clinic needs as

- Patient Care
- Logistics
- Privacy concerns and audits

Most datasets created are still in use currently and assist Springfield Clinic management on critical decisions made daily.

While working as a Business and Clinical Intelligence Business Analyst 2 (Lead), Matt also gained experience creating datasets. These datasets were of the metric variety and used at Springfield Clinic to report on some of the larger tables in the database, and then house those metrics for historical reports. Matt was able to accomplish this by creating a log parse for webserver IIS logs and importing them into a SQL database temporarily. From there, Matt created metrics from the data which allowed him to easily report on it.

Matt also has extensive experience reading and writing queries against complex data structures, such-as star-schema warehouse data.

10/26/2016

D.4.1.1.5 - The degree to which the candidate demonstrates experience using Microsoft SQL Server to model data into datasets for consumption of business intelligence software

Vendor Response:

The candidate presented has over 5 years of experience using Microsoft SQL Server to model data into datasets for consumption of business intelligence software. The majority of this experience was gained while he led the project to create Springfield Clinic's data warehouse while working as a Business and Clinical Intelligence Business Analyst 2 (Lead).

While at Springfield Clinic, the candidate was tasked with leading the effort for Springfield Clinic to create their own data warehouse. This was a complex effort combining data bases from over 15 applications dealing with patient data, medical codes, financial records, and many more forms of data. Matt utilized Microsoft SQL Server at every step of the process in the creation, and then the maintenance of Springfield Clinic's data warehouse.

One of the largest tasks Matt undertook using Microsoft SQL Server was to clean up Springfield Clinic's data for Business Intelligence use. This was essential work to the project in order for accurate reports and dashboards to be created. He also used Microsoft SQL Server to create standardized and uniform datasets, which was critical in ensuring that the deployment of their reports was consistent to their end users.

D.4.1.1.6 - The degree to which the candidate demonstrates experience with data security and privacy by anonymizing datasets

Vendor Response:

The candidate presented has over 5 years of high level experience with data security and privacy through anonymizing datasets. The bulk of this experience was gained while working as a Business and Clinical Intelligence Business Analyst 2 (Lead) at Springfield Clinic.

Springfield Clinic is one of the largest medical services providers in downstate Illinois, and thus deals with millions of PII records in their databases. As a Business and Clinical Intelligence Business Analyst 2 (Lead), Matt deals with PII and sensitive data on a daily basis, and routinely is tasked with anonymizing datasets for security purposes. This task was also performed extensively while the candidate led the effort to create the data warehouse.

Matt also works directly with Springfield Clinic's Privacy department on a daily basis to create various reports for auditing purposes. These audit reports are used by the Privacy department to measure how effective Springfield Clinic's PII security efforts are. This exposure to PII on a daily basis has made Matt a subject matter expert on data security at Springfield Clinic.

RESUME FOR BUSINESS/DATA ANALYST – MATT FUITEN

TECHNICAL EXPERIENCE

- Lead BA on multiple database design, programming, and management projects
- Lead BA on the implementation project for a data warehouse at Springfield Clinic
- Proficient in reading and writing queries against **star-schema data structures**
- Over 5 years of experience in requirements elicitation for data driven dashboards and reports
- Over 5 years of experience in using data analytics for reporting
- Over 5 years of experience in data modeling
- Over 5 years of experience using Agile methodologies
- Hardware installation, configuration, maintenance, and troubleshooting
- User and group account administration
- Windows P.C. operating system support and configuration
- NTFS file system, security, encryption, compression, disk spanning, and mirroring
- Troubleshooting skills for the P.C. Platform
- TCP/IP protocol including IP addressing, sub netting, and dynamic routing
- TFTP /IP Hyper terminal configuration
- Implement DHCP for automatic IP assignment
- Install and configure Windows XP, Windows 7, server 2003, server 2008 R2, Linux Red hat
- Install and configure Windows 2000 Professional and Server
- Routing and Remote Access Services (RRAS), Internet Information Server (IIS)
- Able to implement Network and Windows XP, Windows 7, server 2003, server 2008 R2 into file systems and users groups
- Project management
- Implementation of a network setup from server to pc's
- Process Flows
- Technical Documentation
- **Predictive Analytics** Algorithms

Key Software Experience



Microsoft Power BI, Tableau, Oracle, Microsoft SQL Server, Java, Visual Basic, Microsoft Visual Studio, VBScript, .NET (MVC), C#, Linux CentOS, SSRS – SQL Server Reporting Services, SSIS – SQL Server Integration Services, Visual Studio 2008-2015, WebFocus 8, WebFocus Development Studio, Hyperstage database, Remote Assistance, Cisco VPN client, Microsoft Office 2003-2013 (PowerPoint, Word, Excel, Front page, Access, and Outlook), Active directory, Windows Parallels, Microsoft Server 2012, Microsoft SQL Server, Allscripts Touchworks EHR, Allscripts dbmotion, SIS, GE IDX., Ephesoft OCR, Health Catalyst, Qlik View.

PROFESSIONAL EXPERIENCE

Springfield Clinic

June 2012 - Present

Business & Clinical Intelligence Business Analyst 2 (Lead)

- Accountable for development and maintenance of summarized operational data and reports used for measurement of business operations of the clinic
- Responsible for liaising the Data Reporting Analysts, IT Programmers, IT Systems Analysts, and clinical/operations experts to assure that the data warehouse system accurately reflects operations of Springfield Clinic reporting clients
- Activities under the scope of responsibility include: leading and managing projects to create or change data extract processes, create or change on-demand reports available to end-user via the reporting tool, developing analytic techniques to assess data quality, and overseeing activities performed by data management vendors to assure accurate and timely execution of contracted activities
- Use BI tools such as **Microsoft Power BI** to create and/or maintain reports and data extracts for Springfield Clinic staff as needed.
- Analyze the data requirements for information within the Clinic and determine the method of obtaining and presenting the information to meet the needs of Clinic physicians and staff.
- Gather the appropriate data for use in analyzing, designing, coding, and testing program logic to devise simple and elegant solutions that meet required end-user specifications.
- Evaluated/implemented **Tableau** during exploration phase of BI Tool project.
- Implement BI Tool queries against **star-schema data warehouse**.
- Assist upper management in evaluating and selecting the appropriate BI tools for use throughout Springfield Clinic
- Interview end users to determine requirements for data, reports, analyses, metadata, training, service levels, data quality, and performance. Recommends appropriate scope of requirements.
- Assess user needs and provide feedback to management and/or vendor for future product growth and development.
- Install, configure, deploy, and tune BI tools.
- Troubleshoot BI tool problems and tunes for performance.
- Design, propose, and implement application solutions that address legitimate business process needs, reporting needs, and benchmarking needs of the clinic
- Act as data architect to translate requirements into technical specifications.
- Help identify and assess potential data sources.
- **Validate that data warehouse** meets requirements and service-level agreements.
- Creates reports and **data extracts** in response to ad-hoc report requests as needed. Assists other departments in designing, preparing and analyzing reports
- Assists with special projects as assigned by the Director of Decision Support
- Project management responsibilities including: feasibility studies, estimating, planning, designing, development, quality assurance, prototyping, implementation, and evaluation of systems.
- Defines training requirements for end-users and project team members

10/26/2016

Springfield Clinic

June 2012 - Present

Application Developer I

- Develop and modify internal applications and operating or database systems. Perform testing and debugging tasks on application software and/or operating systems software, documenting all programming and system changes
- Provide technical support for clinical applications and database
- Analyze, design, code and test program logic to meet required end user specifications for clinic systems and databases
- Accountable for development and maintenance of summarized operational data and reports used for measurement of business operations of the clinic
- Activities under the scope of responsibility include leading and managing projects to create or change data extract processes, create or change on-demand reports available to end-user via the reporting tool, and overseeing activities performed by data management vendors to assure accurate and timely execution of contracted activities
- Assists with special projects as assigned by the Programming Supervisor
- The managing of projects includes, but is not limited to: feasibility study, estimating, planning, designing, development, quality assurance, prototyping, implementation, and evaluation of systems. Defines training requirements for end-users and project team members
- Assisting IT support teams on troubleshooting issues with clinical applications (Touchworks, dbmotion, SIS, PaceArt, ect)
- Assisting in all clinical application upgrades or hot fixes.
- Creates and/or maintain reports and data extracts as needed.

Wells Fargo Home Mortgage

January 2009 - June 2012

Mortgage QA/Data Analyst I

- Review and train the MLA department in reviewing loans to purchase for Wells Fargo
- Help user with Microsoft Office applications issues (Excel, Access, Word, PowerPoint, and Word)
- Fix printer and software applications for users
- Attend meeting to give my opinion on how Wells Fargo could improve their processes
- Write, test, and review change request for application within the company
- Perform training sessions to help users improve their skills within the company and review protocols
- Create html pages with Microsoft Front Page
- Create training documentation for other staff members
- Add users in Galt which corresponds with Activity Directory to create user ID's
- Helps users personalize their work pc's to fit their needs.
- Use Visual Basic to update and maintain QA tools.

10/26/2016

Family Video, Inc.

October 2007-January 2009

System Administrator

- 50%phone and 50% Via Remote assistance support for the stores
- Assisted callers with Unlocking accounts, reset passwords, and computer maintenance
- Created, serviced and monitored tickets from stores
- Assisted with migrating to new servers and computers in over 550 stores
- Provided comprehensive remote and onsite technical support for stores
- Assisting users installing applications needed for the store
- Help desk/ desktop support for numerous stores within the company
- Installed and removed Pc's within stores
- Reimaged over 550 servers and 100 pcs with Linux
- Trouble shoot and repair servers and pcs
- Installed ram and cleaned up pcs when they came in from stores
- Set up HP, Brothers printers configuration
- Went to the stores and worked with the users to install servers, thin clients, routers, and monitors
- Worked on Linux based CentOS servers

Robert Morris University Internship

October 2009 – December 2009

IT Technical Internship

- Provided hand-on assistance with schools computer labs, (set-up and administration)
- Installed and removed Pc's within the school
- Migrated from Norton Antivirus to Kaspersky
- Support Cisco WLAN for the school
- Solved printer issues
- Reimaged 25pcs with Windows 7
- Updated ram in 25 MAC pcs

EDUCATION

Robert Morris University

2006-February 2009

Bachelors in Computer Science

- Networking Security, Network Administration, Information Technology, Computer Programming.

10/26/2016

CERTIFICATIONS

Springfield, IL

- Network ++
- Levi, Ray & Shoup, Inc. – Microsoft Gold Certified – Writing Queries Using SQL Server 2014 Transact-SQL
- Levi, Ray & Shoup, Inc. – Microsoft Gold Certified – Implement and Maintain SQL Server 2014 Integration Services
- GALEN training on Allscripts Touchworks EHR

REFERENCES – MATT FUITEN

Travis Matthews

Matthews Business Analysis
26124 W County Line Rd
Waggoner, IL 62572
(217) 836-3758

Josh Wright

Levi, Ray, & Shoup, Inc.
2401 W. Monroe St.
Springfield, IL 62704
(217) 361-6510

Kyle Scroggin

Levi, Ray, & Shoup, Inc.
2401 W. Monroe St.
Springfield, IL 62704
(217) 737-7350

Damon Tripp

Springfield Clinic
3180 Adloff Lane
Springfield, IL 62703
(314) 435-0660

PROPOSED CANDIDATE #2

10/26/2016

PROPOSED CANDIDATE FOR BUSINESS/DATA ANALYST

BIS Inc. presents: Josh Wright

BIS Inc. is presenting Josh Wright for the position of **Business/Data Analyst**, a position we believe he is uniquely qualified for due to his strong Business Analyst background and proficiency with data and business intelligence tools. Josh has over 10 years of Business Analyst experience working at some of the top IT shops in Central Illinois. During this time, he's had numerous opportunities to work with his clients data to improve their day to day operations, or to improve existing software currently being used.

Our candidate spent over 5 years as a Business Analyst on the PensionGold product at Levi, Ray, and Shoup. While there, Josh implemented **Google SSO** and Google Analytics for the Dallas Police and Fire Pension System (TX) to aid in the use of the PensionGold product.

Also at LRS, Josh created various SQL Server related datasets to analyze average contributions, age of population, monthly benefit amounts, and other pension data related characteristics for clients such as Dallas Police and Fire (TX), City of Santa Barbara (CA), City of Cincinnati (OH), and Orange County (CA). The clients used these datasets to predict future retirement funding responsibilities of the pension funds, among other uses.

Josh also has extensive experience with **longitudinal datasets** and **predictive analytics** from his time at LRS. While there, he worked with the Orange County Employee Retirement System (CA) to compile monthly longitudinal usage data. OCERS used this data to dictate future enhancement selections to the PensionGold product. OCERS is still using this data today to make those decisions.

Josh's most recent role has been at the Illinois Department of Children and Family Services. While here, Josh has continued to be able to learn and use industry leading **BI tools**. Josh has gained valuable experience with **Tableau**. After the completion of extensive training, Josh worked directly with the DCFS data warehouse team to initiate and implement the use of the Tableau product. Josh's expertise in this software was utilized by DCFS by having him conduct training sessions with users once the solution was implemented.

We believe the candidate presented has a unique skill set not often seen by a Business Analyst.

- Over 10 years of experience gathering requirements and working with end users
- Necessary technical skills needed to succeed in the role.
- Proficient user of Microsoft Power BI, Tableau, Microsoft SQL Server and Google Analytics.
- Certified Scrum Master who has spent the last 3 years working an Agile environment.

10/26/2016

D.4.1.1.1 - The degree to which the candidate demonstrates expertise conducting statistical analyses of data using standard statistical techniques

Vendor Response:

The candidate has over 10 years of experience demonstrating expertise in conducting statistical analyses of data using standard data techniques, through his time as a Business Analyst at Levi, Ray, and Shoup, the Illinois Department of Transportation, and the Illinois Department of Children and Family Services.

While working as a Business Analyst at Levi, Ray, and Shoup, Josh implemented Google SSO and Google Analytics for the Dallas Police and Fire Pension System (TX) to aid in the use of the PensionGold product. This helped the client make crucial decisions in predictive modeling and cost analysis of the enhancements they were making to the product.

Also at LRS, Josh created datasets to analyze average contributions, age of population, monthly benefit amounts, and other pension data related characteristics for clients such as Dallas Police and Fire (TX), City of Santa Barbara (CA), City of Cincinnati (OH), and Orange County (CA). The clients used these datasets to predict future retirement funding responsibilities of the pension funds, among other uses.

The candidate also gained valuable experience conducting statistical analyses of data while at the Illinois Department of Transportation. While there, Josh assisted the Director of Traffic Safety in modeling traffic safety data. The modeling was then used to determine traffic safety related trend and cost analysis. The analysis is still in use today at the agency. Josh also worked with the agency to provide predictive modeling of contract estimation data. This data helped to determine the required functionality for the re-write of the Illinois Department of Transportation contract management system. Lastly at IDOT, the candidate did trend analysis of the Highway Contract Bulletin creation process. This analysis helped to determine required functionality for the conversion of the Bulletin to an automated process.

Finally, while at the Illinois Department of Children and Family Services, Josh created and maintained predictive analysis and predictive modeling for DCFS mobile application project. This analysis assisted in determining the project's return on investment, production feature set, role deployment strategy, and build vs. buy decisions.

D.4.1.1.2 - The degree to which the candidate demonstrates expertise gathering functional specification requirements for the development of dashboards and reports

Vendor Response:

The candidate has had numerous opportunities to gather functional specification requirements for the development of both dashboards and reports while serving as a Business Analyst over the past 10 years.

While at Levi, Ray, and Shoup, the candidate worked with the clients and their users to gather requirements on all system reports for Dallas Police and Fire (TX), City of Santa Barbara (CA), City of Cincinnati (OH), and Orange County (CA). These reports helped each agency make critical decisions related to the administration of their pension funds.

While at the Illinois Department of Transportation, Josh worked with users to create complete requirement documentation for the dashboard implementation on the following projects:

- Bridge Project Tracking
- Contract Management
- Grant Management and Tracking

The candidate also assisted IDOT in creating the complete requirements documentation for the Highway Contract Bulletin automation project. The Highway Contract Bulletin automation project was a work effort to streamline the document provided to over 20,000 users who submit contract proposals to do Illinois road work.

10/26/2016

Lastly at the Illinois Department of Transportation, Josh created requirement documentation for user and usage reports for Illinois Department of Transportation in house single sign on application. This work effort assisted the agency in monitoring security around the system, and in determining what future enhancements to make.

Finally, while at the Illinois Department of Children and Family Services Josh currently elicits and documents requirements for numerous monthly and ad hoc reports. This is through the agency's case management application, which Josh is tasked with improving.

D.4.1.1.3 - The degree to which the candidate demonstrates experience working with interactive data visualization products focused on business intelligence such as Microsoft Power BI, Tableau or similar products

Vendor Response:

The candidate has extensive experience in the use of interactive data visualization products focused on business intelligence while working at the Illinois Department of Transportation, the Illinois Department of Children and Family Services, and through self-guided learning.

While working as a Business Analyst at the Illinois Department of Transportation, Josh became an experienced and proficient user of Microsoft Power BI. He first served as the Lead Business Analyst on the feasibility study to use Microsoft Power BI as the IDOT BI Portal solution. This, along with his completed online training for Microsoft Power BI made him an expert level user of the application.

After the selection of Microsoft Power BI was complete, Josh was able to use the solution daily on such projects as Bridge Project Tracking, Contract Management, and Grant Management and Tracking. This daily use of the solution further enhanced his knowledge of Microsoft Power BI.

At the Department of Children and Family Services, the candidate gained valuable experience with Tableau. After the completion of extensive training, Josh worked directly with the DCFS data warehouse team to initiate and implement the use of the Tableau product. Josh's expertise in this software was utilized by DCFS by having him conduct training sessions with users once the solution was implemented.

Josh is passionate about business intelligence, and has spent numerous hours completing job related training on the different BI tools available. Some examples of training courses Josh has completed are:

- Microsoft Power BI
- Tableau
- Jaspersoft
- PIWIK
- Microsoft Sharepoint
- Google Analytics

10/26/2016

D.4.1.1.4 - The degree to which the candidate demonstrates experience with management of data to produce accurate and consistent longitudinal datasets

Vendor Response:

The candidate has demonstrated extensive experience with management of data to produce accurate and consistent longitudinal datasets, many of which are still in use by clients today.

While working as a Business Analyst at Levi, Ray, and Shoup the candidate worked with the Dallas Police and Fire Pension Fund (TX) to build and maintain datasets pertaining to their yearly 1099 federal reporting. The data Josh produced for the client assisted them in both predicting potential filing issues, and in establishing potential cost saving measures.

Also at LRS, Josh worked with the Orange County Employee Retirement System (CA) to compile monthly longitudinal usage data. OCERS used this data to dictate future enhancement selections to the PensionGold product. OCERS is still using this data today to make those decisions.

While acting as a Business Analyst at the Illinois Department of Transportation, the candidate worked closely with management to create and maintain datasets that assisted in the feasibility study on the usage of Microsoft CRM at the agency. This data was critical in the decision to select Microsoft CRM as the solution to purchase. Also at IDOT, Josh worked closely with the Division of Traffic Safety Data Science Department as the Lead BA to create standards and role/responsibility documentation.

D.4.1.1.5 - The degree to which the candidate demonstrates experience using Microsoft SQL Server to model data into datasets for consumption of business intelligence software

Vendor Response:

The candidate has become proficient in the use of Microsoft SQL Server over the past 10 years while serving as a Business Analyst and Project Manager at Levi, Ray, and Shoup, the Illinois Department of Transportation, and the Illinois Department of Children and Family Services. He has successfully modeled data into datasets for consumption of business intelligence software at each of these places.

While working as a Business Analyst at Levi, Ray, and Shoup, Josh used Microsoft SQL server exclusively to manage, report, and maintain datasets for all of his PensionGold clients. These clients then would use the datasets Josh created in their various business intelligence software products. Since different clients were using different products, it was crucial that Josh produce accurate datasets for portability across all clients.

At the Illinois Department of Transportation, Josh used Microsoft SQL server exclusively to manage, report, and maintain datasets for IDOT projects including:

- Bridge Project Tracking
- Contract Management
- Grant Management Tracking

The datasets Josh created on these projects were then used in Microsoft Power BI, the business intelligence software of choice at IDOT.

The candidate also used Microsoft SQL Server in his role as Project Manager at the Illinois Department of Children and Family Services. In this role, Josh guided his team in the creation of data modeling, creation, and reporting datasets, the use of Tableau and PIWIK, and the creation of executive level reporting for the agencies mobile projects.

Outside of his projects, Josh as also completed numerous Microsoft SQL certified courses through LRS Education.

10/26/2016

D.4.1.1.6 - The degree to which the candidate demonstrates experience with data security and privacy by anonymizing datasets

Vendor Response:

The candidate has over 10 years of demonstrated experience with data security and privacy by anonymizing datasets gained from his previous roles with Levi, Ray, and Shoup, the Illinois Department of Transportation, and the Illinois Department of Children and Family Services.

While acting as a Business Analyst at Levi, Ray, and Shoup, the candidate gained valuable experience managing protocols to ensure the safe transmission of personally sensitive data between PensionGold software and its' web services and client facing web application. This work had a direct impact on hundreds of thousands of retirees whose data resides in the PensionGold databases.

Josh also dealt with security and privacy at the Illinois Department of Transportation. While working as a Business Analyst, he worked directly with the development staff to create requirements documentation for IDOT's single sign on application, including encryption and end user data security. Josh then tested and maintained the system and security protocols after it moved into production.

Lastly, Josh gained valuable data privacy experience while working as a Business Analyst and Project manager at the Illinois Department of Children and Family Services. While at DCFS, Josh created feasibility analysis for SSN encryption within their case management system. Once the study was analyzed, the SSN encryption project was kicked off and Josh served as the Lead BA on the effort. Josh also acted as the Project Manager on the column level encryption project of the case management system, leading meetings and assisting the BA in gathering requirements and testing.

10/26/2016

RESUME FOR BUSINESS/DATA ANALYST – JOSH WRIGHT

JOSH WRIGHT

Address: [REDACTED] Phone: [REDACTED] Email: [REDACTED]

QUALIFICATIONS PROFILE

Highly analytical, focused, and versatile business analyst offering experience in both Waterfall and Agile software development methodologies across both public and private entities. Motivated professional with extensive expertise in requirement elicitation and documentation in both application development and business intelligence. Proven reputation of strong customer service, professionalism, and both written and verbal communication skills when delivering high quality solutions to meet the specific business needs of clients. Skilled in navigating implementations within a public entity including legacy system constraints, engaging the appropriate stakeholders throughout a project, and creating alignment between stakeholders from multiple levels within an organization.

AREAS OF EXPERTISE

- *SQL query and script creation and execution*
- *Business process analysis and improvement*
- *Requirements Modeling Language certified (RML)*
- *Certified Scrum Master*
- *Predictive and Trend Modeling of data*
- *Requirement specification elicitation and documentation*
- *Ability to work with cross-functional teams*
- *Proficient in Business Intelligence tools such as Microsoft Power BI and Tableau*

PROFESSIONAL EXPERIENCE

Illinois Department of Children and Family Services – LRS Inc. - Springfield, Illinois
Business Analyst/Project Manager/Scrum Master **December 2015 to Present**

Assigned to the Illinois Department of Children and Family Services (DCFS)

- Primary assignment as Project Manager for Case Management system for the state
 - Create Project Schedules
 - Manage development resources
 - Deployment schedules and plan creation
 - Assist Case Management Product Owner in prioritization of requests

10/26/2016

- Performed Business Analyst duties for both report and enhancement projects
 - Requirement elicitation
 - Documentation
 - Testing
 - Feasibility studies on encryption methodology
- Created BI reports and datasets for case management mobile pilot project
- Assisted in implementation of Tableau analytics solution
- Brought in by the CIO to move DCFS's SDLC to an Agile Methodology
 - Created implementation plans
 - Streamlined project alignment and prioritization process within the department
 - Advocated for new role within the department, Product Owner, and assisted in selection of candidate
 - Created and facilitated Agile/Scrum trainings for all staff
 - Acted as the Scrum Master for two teams that maintained and enhanced the Case Management system

Illinois Department of Transportation - Springfield, Illinois
Business Analyst/Scrum Master January 2013 to November 2015

Assigned to the Illinois Department of Transportation (IDOT)

- Acted in the role of both Scrum Master and Business Analyst for several projects at IDOT:
 - Grants Management Application – Gathered requirements for an Enterprise wide grants management solution to manage grants from grant creation to project close/final payout
 - MS CRM Proof-of-concept – Analyze MS CRM viability as a solution architecture for current and future IDOT IT projects
 - Land Acquisition Administration Solution – Complete Project Initiation package (Project Survey, Project Request, Organizational Chart, Business Objectives Model, High Level Requirements, Rough Order of Magnitude, and Charter)
 - Federal Billing Administration Solution – Enterprise wide Federal Billing and Reimbursement solution for IDOT
 - Integrated Disadvantaged Business Entity (DBE) Solution – Solution to automate federally required DBE reporting
 - Authorized Role Management (ARM) – Single sign on system used for all current and future systems within IDOT
 - Bridge Project Tracking Re-write (BPTR) – Work management tool used by structural engineers
 - Web Contract and Letting Management (WCLM) – System used to manage contracts from creation through award
 - BI Portal – Business Intelligence solution for data warehouse team as well as a customer facing solution to data
- Assisted IDOT IT management staff in implementing Scrum practices
 - Created initial drafts for several white papers detailing team guidelines including story writing, process outlines, and ceremony schedule
 - One of two original certified Scrum Masters at IDOT

10/26/2016

Levi, Ray, & Shoup - Springfield, Illinois

Business Analyst **August 2007 to December 2012**

Assigned to support and deliver customizations or enhancements for the PensionGold Retirement Solution while acting as a liaison between development staff and clients. PensionGold is a software application used by over 40 pension funds to administer their funds.

Responsibilities:

- Elicit requirements for enhancement requests
- Provide both predictive and trending data for usage
- Maintain longitudinal datasets for yearly initiatives (1099 updates, open enrollment, etc.)
- Create and deliver data update scripts to customers
- Provided training to retirement administrative staff
- Created test plans for both bug fixes and enhancements including yearly 1099 updates
- Create detailed cost estimates for enhancement requests
- Provide data analysis to determine records in error
- Main customer point of contact

Federated Funeral Directors of America - Springfield, IL

Retirement Accountant **August 2004 to July 2007**

Administered the 401(k)'s for over 300 clients across the United States:

Responsibilities:

- Prepared yearly IRS form 5500
- Delivered year-end financial statements to account fiduciaries
- Provided contribution estimates to 401(k) participants
- Calculated amounts for participants for both required and voluntary distributions

EDUCATION AND CERTIFICATIONS

MacMurray College - Jacksonville, Illinois

Bachelors of Science

June 2000

Major in Physics

Minor in Mathematics and Art

Graduated with a 3.84 GPA

Luella M. Todd Blackburn Award for Mathematics, 2000

Advanced Physics Student of the Year, 2000 and 1998

Technical Physics Student of the Year, 1997

Scrum Alliance - Bloomington, Illinois

Certified Scrum Master

June 2014

Seilevel - Springfield, Illinois

Requirements Modeling Language certified

June 2013

LRS Education Services - Springfield, Illinois

Certified SQL training

June 2012

10/26/2016

REFERENCES – JOSH WRIGHT

Travis Matthews

Matthews Business Analysis
26124 W County Line Rd
Waggoner, IL 62572
(217) 836-3758

Justin Burdick

[REDACTED]
[REDACTED]
(603) 998-9406

Betsy Calcara

[REDACTED]
[REDACTED]
(217) 299-8628

Staci McTague

[REDACTED]
[REDACTED]
(217) 622-9720

MILESTONES AND DELIVERABLES

D.3 – MILESTONES AND DELIVERABLES

D.3. MILESTONES AND DELIVERABLES:

D.3.1. Two business/data analysts will work under the direction of ISBE Information Technology (IT) management (hereafter referred to as management) on a time-and-materials basis in the planning, development, support and maintenance of various projects as determined and defined by management.

The contractors will assist ISBE staff with the implementation of a technology-centered initiative with a mission to empower the Illinois education community with access to data and technology tools designed to directly benefit students.

- The contractor may be assigned to multiple project teams over the course of the contract. Each project team will maintain a project plan that includes clearly defined objectives, tasks, and timelines. The contractor will be required to provide regular status updates on tasks and to attend project status meetings. The project team's progress and accomplishments will be continually measured/evaluated by ISBE IT management against the expectations to ensure that each member is performing efficiently.
- As defined and approved by management, the contractor will support ISBE staff by:
 - analyzing and interpreting data using scientific methods,
 - assisting program areas to create data stories using statistical techniques,
 - producing insightful dashboards and reports to answer questions about program data, and
 - helping to standardize data visualizations agency-wide to increase functional use of dashboards and reports.

D.3.2. Treatment of and Access to State Data

Notwithstanding anything to the contrary herein, State shall be and remain, at all times, the sole and exclusive owner of the State Data (including any modification, compilation, or derivative work therefrom and all intellectual property and proprietary rights contained therein or pertaining thereto) and, effective in each case upon the creation of any such items, Vendor hereby has no rights to such State Data except that Vendor is hereby granted a license to use and copy the State Data solely for purposes of carrying out its duties hereunder during the term and solely to the extent that Vendor requires access to such data to provide the Services as contemplated by this Contract during its term. Vendor shall not commercially exploit the State Data, or do any other acts that may in any manner adversely affect the integrity, security or confidentiality of such items, other than as specified herein or as directed by State in writing.

D.3.3. Transfer/Migration of State Data

10/26/2016

Prior to completion or termination of the contract, and at no additional cost, Vendor will ensure that all data is delivered to the Agency as an Excel Spreadsheet backup file containing all data in a relational format including a data model and data dictionary, and shall provide technical assistance to transfer the data to a new or replacement system.

Vendor agrees to clear the State's data from all computers as per the methods specified below:

After transfer of data back to Agency and/or migration of data to a new or replacement system, Vendor agrees to clear the State's data that resides on its computer hardware or software by erasing or wiping/sanitizing in a manner that prevents retrieval of electronically stored information.

The following method shall be used to accomplish the clearing of data: (i) overwriting the previously stored data on a drive or a disk at least 10 times and (ii) certifying in writing that the overwriting process has been completed by providing the following information: (1) the serial number of the computer or other surplus electronic data processing equipment; (2) the name of the overwriting software used; and (3) the name, date, and signature of the person performing the overwriting process. If the method above will not prevent retrieval of the electronically stored information, a method such as burning in a pyrolytic furnace or other incinerator or incendiary device, destroying in a dry pulverizing system, shredding, grinding, milling, knurling, disintegration, or degaussing is appropriate and Vendor will be required to certify in writing the method used including the date and time of data destruction.

Vendor Response:

BIS Inc. agrees and complies with the requirements set forth in the Milestones and Deliverables.

TRANSPORTATION AND DELIVERY TERMS

D.5 – TRANSPORTATION AND DELIVERY TERMS

BIS Inc. understands this contract does not contain any requirements for transportation and delivery terms.

WHERE SERVICES ARE TO BE PERFORMED

D.8 – WHERE SERVICES ARE TO BE PERFORMED

If awarded this bid, 100% of the services will be performed at the following location:

ISBE Office

100 North First Street

Springfield, IL

Offer for

Illinois State Board of Education

Illinois Longitudinal Data System -
Business/Data Analysts

Ref# 22038788

Proposal By



Packet 2

10/26/2016

SECTION 2.

E. PRICING

E.1. FORMAT OF PRICING:

- E.1.1.** Offeror shall submit pricing in the format shown below, based on the terms and conditions set forth in Section 1 of this Request for Proposal. Offeror's price Offer shall serve as the basis for the compensation terms of the resulting contract. Failure to submit pricing as shown in this section may render Offeror's entire Offer Non-Responsive and ineligible for award. A vendor may offer on all positions or individual positions by submitting the individual cost proposals for each candidate. Each cost proposal must be clearly marked as to which position the candidate is being submitted for. Offerors are only permitted to submit a maximum of one candidate per position for this RFSP.

Pricing shall be submitted in the following format:

Indicate the hourly rate for the Business/Data Analyst and compute the total time-and-materials cost.

<u>Business/Data Analyst 1:</u>	<u>Hours</u>	<u>X</u>	<u>Hourly Rate</u>	=	<u>Total Cost</u>
FY 2017 (upon execution-6/30/2017)	<u>1333</u>	X	<u>78.00</u>	=	<u>103,974</u>
FY 2018 (7/1/2017-6/30/2018)	<u>2000</u>	X	<u>82.00</u>	=	<u>164,000</u>
FY 2019 (7/1/2018-6/30/2019)	<u>2000</u>	X	<u>84.00</u>	=	<u>168,000</u>
Total Contract			<u>435,974</u>		

10/26/2016

Indicate the hourly rate for the Business/Data Analyst and compute the total time-and-materials cost.

<u>Business/Data Analyst 2:</u>	<u>Hours</u>	<u>X</u>	<u>Hourly Rate</u>	=	<u>Total Cost</u>
FY 2017 (upon execution-6/30/2017)	<u>1333</u>	X	<u>76.00</u>	=	<u>101,308</u>
FY 2018 (7/1/2017-6/30/2018)	<u>2000</u>	X	<u>78.00</u>	=	<u>156,000</u>
FY 2019 (7/1/2018-6/30/2019)	<u>2000</u>	X	<u>80.00</u>	=	<u>160,000</u>
Total Contract			<u>417,308</u>		

E.2. TYPE OF PRICING: The Illinois Office of the Comptroller requires the State to indicate whether the contract pricing is firm or estimated at the time it is submitted for obligation. Pricing pursuant to this contract is firm.

E.3. EXPENSES ALLOWED: Expenses ☒ are not allowed ☐ are allowed as follows:

E.4. DISCOUNT: The State may receive a n/a % discount for payment within n/a days of receipt of correct invoice. This discount will not be a factor in making the award.

E.5. TAXES: Pricing shall not include any taxes unless accompanied by proof the State is subject to the tax. If necessary, Offeror may request the applicable agency's Illinois tax exemption number and federal tax exemption information.

E.6. OFFEROR'S PRICING OFFER: Attach additional pages if necessary or if the format of pricing specified above in Section E.1 requires additional pages.

E.6.1. Offeror's Price for the Initial Term: Candidate 1: 103,974
Candidate 2: 101,308

E.6.2. Renewal Compensation: If the contract is renewed, the price shall be at the same rate as for the initial term unless a different compensation or formula for determining the renewal compensation is stated in this section.

E.6.2.1. Agency/University Formula for Determining Renewal Compensation:
See section E.1.2

E.6.2.2. Offeror's Price for Renewal(s): Candidate 1: 332,000
Candidate 2: 316,000