

PROPOSAL TO
STATE OF WISCONSIN
DEPARTMENT
EMPLOYEE TRUST FUNDS

Business Analyst Position

As part of Request for Bid # ETA0017
Project Management and Associated
Services for the
WISCONSIN RETIREMENT SYSTEM

February 28, 2011





February 28, 2011

Ms. Joanne Cullen, Director PMO
Dept. of Employee Trust Funds
801 Badger Road
Madison, WI 53713-2526

RE: RFB ETA0017 Request dated February 23, 2011

Proposal for a Business Analyst (BA) position as specified in the above referenced bid to be considered as part of the Data Governance and Data Privacy Program project

Dear Ms. Cullen:

GL Insight LLC (GLI) is pleased to present our proposal in response to your request for a Business Analyst related to RFB ETA0017 with responsibilities related to the Data Governance and Data Privacy Program that the ETF will be undertaking soon.

The candidate we are proposing for this position, Mr. Stephen Weiss, has extensive experience with all aspects of data governance and over four years' experience with the Milwaukee County Retirement System.

As we mentioned in our original proposal, GLI works diligently to match our consultant experience to our clients' needs. The Department of Employee Trust Funds (ETF) will find that Mr. Weiss' experience is an excellent match for the needs of ETF's initiative involving Data Governance and Data Privacy.

Our attached proposal provides a detailed description of Mr. Weiss' qualifications that address each of the areas described in the Deloitte Development LLC Risk Remediation Roadmap for Online Self Services submitted on December 10, 2010 (Remediation Roadmap). After considering each of the points in the Remediation Roadmap, it will be clear that Mr. Weiss has the perfect background and skill sets to assist the ETF in this important initiative.

Please contact Ms. Linda Hall if you have any questions in reviewing our response. We appreciate your careful consideration of our response and look forward to having Mr. Weiss join GLI as we continue to provide Project Management and Associated Services for the ETF.

Sincerely,

A handwritten signature in black ink that reads 'Linda H. Hall'. The signature is written in a cursive, flowing style.

Linda H Hall, CEO

RESPONSE TO REQUEST FOR BUSINESS ANALYST POSITION

In this section, GL Insight LLC (GLI) provides its point-by-point response to each requirement identified in RFB ETA0017 for the Business Analyst position. Throughout our response, we address the needs related to the Data Governance and Data Privacy Program as identified on page 22 in the Risk Remediation Roadmap for Online Self Services submitted by Deloitte Development LLC on December 10, 2010.

Our proposed Business Analyst (BA) is Mr. Stephen Weiss. Mr. Weiss has 25 years of broad technical experience that includes over 8 years of experience working as a business analyst in a data processing environment. As a result he has extensive understanding of processes and requirements needed in systems environments. He has a thorough understanding of project planning, system configuration, data mapping, data migration, system testing, system conversions, and post implementation support. He has specific experience in developing data governance and privacy policy for retirement, banking, financial, legal, benefits and human resource programs. He has also development experience on Health Information Portability and Accountability Act (HIPAA) 834 data exchange files which may be of assistance to the ETF on related projects.

His professional strengths are in critical analysis, programming, testing, troubleshooting, reporting, making deadlines and building positive, productive relationships with clients and co-workers. Stephen is also proficient in the standard Microsoft Office tools used by ETF. Since 2007, Stephen has been working for the Milwaukee County Retirement System primarily as a business analyst and a technical analyst.

His analyst skills coupled with his technical and policy skills make him the perfect candidate for the Business Analyst position focused on Data Governance and Privacy as well as any other initiatives ETF may undertake.

Business Analyst Requirements

(1) Experience in project and portfolio management, business requirements, training, team building, creating trust and working toward common goals and values, multitasking, crisis management – ability to identify important and critical issues in the context of overall priorities while balancing sense of urgency within the context of the business strategy and objectives, works to identify and eliminate factors creating the crisis and to minimize recurrence, collaborative problem solver - listens first and seeks to understand others. Values differing views and opinions as a potential source of better decisions and solutions. Focuses on solutions rather than placing blame. Where necessary, seeks consensus and offers compromise solutions. Drives continuous improvement - seeks ways to work smarter and is willing to offer and accept alternatives. Thinks innovatively and facilitates learning from successes and failures. Manages work schedule to facilitate successful and timely completion of all job tasks.

Mr. Weiss has experience with the complete system development life cycle and adheres to the Project Management Institute's (PMI) standards of project and portfolio management. He has a deep understanding and value of the importance how managing people and relationships can impact projects as much as the methodologies used to manage them. His facilitation skills are excellent and he works to engage his clients in all aspects of his work. He is personable, organized and completes his assignments in a professional manner with an excellent track record of estimating project time and completing programs on time.

(2) Relevant education and training, including college degrees, certifications, dates, and institution name and location.

University of Wisconsin, Madison, WI; Major: Computer Science. Herzing College of Technology Madison, WI; Associate of Science in Electronic Engineering Technology

(3) Names, positions, titles, e-mail address and current phone numbers of a minimum of three references, at least one of whom is an outside customer, who can provide information on the individual's experience and competence to perform; references may be the same as those provided for corporate references. The State reserves the right to contact other references even if not listed in the bid.

Dr. Karen R. Jackson
(Former) Director, Office of Human Resources
Milwaukee County
(Current) Executive Director, Office of Human Resources
Milwaukee Public Schools
jacksonkr@milwaukee.k12.wi.us
(414) 475-8115 (work)

Patricia Perry-Wright
(Former) Employment and Staffing Manager
Milwaukee County
(Current) Human Resources Coordinator, Office of Human Resources
Milwaukee Public Schools
perrywpa@milwaukee.k12.wi.us
(414) 773-9933 (work)
(414) 403-5633 (cell)

Laura L. Acerbi
Implementation Consultant
Ceridian Employer Services
Laura.acerbi@ceridian.com
(847) 698-1581 (work)
(262) 389-6582

(4) Type and Length of Relationship

Mr. Weiss knows Ms. Hall through the MAXIMUS Team that worked at the County beginning in 2006. Mr. Weiss on the County's Retirement System as well as other County systems.

(5) Time Dedication to the Project

100% dedication to the project, average of 40 hours per week.

(6) Implementation Experience

Five years' experience working with multiple firms involving data governance and privacy, conversions, data mapping, creation of test scripts (unit testing, system testing, parallel testing), and the data validation of the conversions.

- Designed and developed an add-on tool for a Benefits Outsourcer that generates HIPAA 834 data exchange files.
- Developed a custom Visual Basic program that automated the Paid Time-off (PTO) process and allowed for easier and more accurate general ledger reporting.
- Developed a custom process for a law firm that would keep track of the legal secretaries' working time with individual lawyers. This customization enhanced a Ceridian Source application executed from the Source menu options.

In addition to his work with the Milwaukee County Retirement System, Mr. Weiss has over 2.5 years of experience working as a programmer analyst in an SAP R/3 environment within the HR module. This

work closely parallels work processes within ETF and within the University of Wisconsin's (UW) PeopleSoft systems. Specifically he has:

- Supported the SAP R/3 HR implementation rollout for TDS for approximately 300 companies with four separate lines of business. There were 111 different tax companies between the four business units. The HR implementation was rolled out on time. Over two years of hands-on SAP R/3 HR Module development and implementation experience, serving as lead analyst for much of this time.
- Nine months of post implementation support experience in the SAP HR Module, primarily in the Employee Data Management, Time Management and Payroll sub modules.
- Performed SAP R/3 Payroll tax calculation configuration for over 4,000 tax authorities in all 50 states during implementation.
- Configured SAP R/3 Payroll Pre-Tax and After Tax Deductions impacting over 9,000 employees in over 300 companies.

(7) Verbal and Written Communication Skills

Mr. Weiss has developed both his written and verbal skill to a high level. He works particularly well with clients who may be challenged by changes in business processes and the systems that support them utilizing his particular verbal skills. Mr. Weiss routinely produces the following professional documents:

- Requirements, including necessary processes and reports; data classifications (critical, useful, historical, etc.); required data for new system needs to be analyzed for completeness in legacy system to determine if data cleanup is necessary prior to conversion; analysis of legacy system and compatibility requirement reports.
- Conversion schemas including data mapping, creation of test scripts (unit testing, system testing, parallel testing), and the post-conversion data integrity cleanup specifications.
- Workflow, including current processes, updated workflow procedures, training documentation and performing all training to necessary personnel.

(8) Project Specifics

Milwaukee County – Milwaukee, WI 02/2007 – present, Business Analyst

- Supported the successful implementation of three data conversions from legacy systems to updated data processing systems.
- Facilitated requirements gathering including necessary processes and reports, as well as data classification. Analyzed data required for new system for completeness in legacy system to determine if data cleanup was necessary prior to conversion.
- Conversion of system data including data mapping, creation of test scripts (unit testing, system testing, parallel testing), and the post-conversion data integrity cleanup.
- Identified workflow changes, creating updated workflow procedures, created training documentation and performed all training to County personnel. After the implementation was completed, I continued Functioned as the system administrator for one of the County systems.
- Conducted post-implementation support for data cleanup and unit/system testing from updates via change orders.

Delamore Jennings, Madison, WI 2004 – 2007, Independent Consultant

- Managed the software development and quality assurance for the product development.
- Created processes and procedures to ensure a quality product.

- Built in-house tools to conduct volume and regression testing for all business rules.

iHouse -Madison, WI, 1999- 2004, Senior Consultant

- Worked with 17 different clients from the following industries: Telecommunications, Banking, Financial Services, Service Industries, Legal, Manufacturing, Transportation, and Benefits & Human Resources Outsourcing.
- Helped develop an add-on tool for a Benefits Outsourcer that generates HIPAA 834 data exchange files.
- Developed a custom Visual Basic program that helped automate the company's PTO (Paid Time Off) process and allow for easier and more accurate G/L reporting using this customization.
- Helped develop a custom process for a law firm that would keep track of the legal secretaries working time with the lawyers of the firm. This was a Visual Basic customization that was added on to a Ceridian Source application and could be executed from the Source menu options.
- Experience working with the data conversions including data mapping, creation of test scripts (unit testing, system testing, parallel testing), and the data validation of the conversions.
- Development of reports using Crystal Reports.

Telephone and Data Systems Madison, WI, 1997- 1999, Senior Programmer Analyst/Team Lead

In addition to the SAP experiences detailed in Requirements No. 6 above, Mr. Weiss was on the SAP implementation team; his experience included functional configuration, system testing, conversion, ABAP programming support and post implementation support.

Nicolet Instruments (now Thermo Fisher)-Madison, WI, 1986- 1997, Manufacturing Engineer

- Ten years of manufacturing experience working first as a test technician, then as a manufacturing engineer for Nicolet Instruments. During the last seven years at Nicolet, emphasis was on writing software programs for various production and test equipment in a circuit board assembly manufacturing facility.
- Created and debugged software
- Wrote programs for daily and monthly backups, disc packing routines and file optimization.
- Developed training guides and trained manufacturing engineers and technicians
- Wrote Excel macros and C programs, which created files and data sheets used by automatic assembly equipment
- Created test software special testing applications of digital oscilloscopes.
- Trained and provided support for technicians operating automated test software in the final test and repair areas.

(9) Methodologies and Tools

PMI and PMBOK, SDLC, Microsoft Office applications, C Programming Language, Excel Macros, Access database applications, and other supportive skills.

Mr. Weiss' knowledge and experiences are an excellent match to the needs of ETF in relation to the Data Governance and Data Privacy Programs.



Cost Proposal Worksheet – ETA0017

Business Analyst in re: Data Governance and Data Privacy Program Project

Vendor Name:	Authorized Signature:
GL Insight, LLC	<i>Finde W. Hall</i>

Date: February 28, 2011

The costs provided below will be based on Section B –Bidder Qualifications and Appendix B within this RFB, except where noted below.

Optional Services:

Position	Years of Public Retirement System Experience	Hourly Rate or Range	Other costs. Please itemize.
Business Analyst	4+ years	\$78 – 85	Travel to sites other than the Badger Road location that is requested by ETF will be billed directly to ETF. Attendance at any seminar, conference or other outside session requested by ETF will be billed directly to ETF

Per the telephone conversation between GLI and the ETF conducted on December 16, 2010, rates for Optional Services will be established specific to the applicable business area as ultimately specified by ETF and to the individual being presented. This BA position is being submitted for the Data Governance and Privacy Program Project and the rate range quoted above applies to this specific business area and to the experience levels of Mr. Stephen Weiss. Documentation of this telephone conversation will be provided upon request.