

REQUEST FOR PROPOSAL

#2019-029
Business Intelligence Data Integration Consulting
Addendum #01

CLARIFICATION

- Section 1.3.1 Timeline of Key Events is modified as follows:

Reference Section	Event Name	Event Due Date
Section 1.2.2	Deadline for Written Inquiries/Questions	November 9, 2018
Section 1.2.2	Response to Written Inquiries/Questions	November 13, 2018
Section 1.2.2	Deadline for Proposal Submission	November 20, 2018
Section 1.3.8	Estimated Respondent Presentation Date (subject to change)	December 13, 2018
Section 2.2	Award Announcement (subject to change)	January 7, 2019
	Estimated Agreement Start Date (subject to change)	January 22, 2019

QUESTIONS

- Could you tell us which enterprise resource planning systems are currently in use in the system?
ANSWER: PeopleSoft for HR, Finance, and Student
- Exhibit 1, table two is based on defined deliverables, but there are no deliverables defined in the RFP. How would you prefer vendors to address this section?
ANSWER: If your solution is proposing an approach with deliverables you should use this table to outline them and the costs.
- Section 1.1.4 – On page 6, the RFP is referred to an RFQ. Is the System looking for a quote and might not move forward, or has the funding been secured for this project
ANSWER: The document is an RFP, funding is secured however the determination of award is outlined in RFP Section 2.2.
- Section 1.1.4 – Who is the executive sponsor for this project?
ANSWER: Chief Information Officer
- Section 1.1.4 - How many hours of support or FTE per year does UMS anticipate they would need to help them build the data marts and analytical environment?
ANSWER: This will vary and will be flexible.
- Section 1.1.4 – What is the main reason/driver for building this environment? Is there a BI/Analytics strategy document or charter driving this initiative that the System could share with responding vendors to better inform their response?
ANSWER: There is not a charter or strategy document. The drivers behind this are related to both data governance/management and to strategic analytics. The data marts initiative is

intended to both centralize and standardize our key institutional data, as well as make those data analytics-ready.

7. Section 1.1.4 – What are the expected outcome(s) and/or deliverables in year one of the project?
ANSWER: Year one deliverables are flexible. First priorities are to support recruitment and retention efforts of the UMS.
8. Section 1.1.4 – Can the System provide a list of the required subject areas that the data marts should incorporate?
ANSWER: Firstly are PeopleSoft Campus Solutions, TargetX, and National Student Clearinghouse. Currently, next targets would be BlackBoard, PeopleSoft Finance and HR; order is subject to change upon shifting priorities.
9. Section 1.1.4 – We understand that UMS' ERP system is Oracle Campus Solutions (Peoplesoft). Can the System provide a comprehensive list of additional transactional systems (LMS, CRM, Advancement, Assessment, etc.) anticipated to be the sources of the data marts?
ANSWER: First priorities are in question #8; UMS Advancement uses Advance; Assessment is Tk20/Taskstream; these would be down the road, in addition to any other potential sources.
10. Section 1.1.4 – Is there an existing dimensional data warehouse(s) (system-wide or at individual institutions) with change data capture that the data marts will be created from or will the data marts be created directly from transactional systems? Or both?
ANSWER: There is no existing dimensional system.
11. Section 1.1.4 – How has the shared services model been implemented for key systems (e.g. Student Information System, HR, Finance, Financial Aid, Admissions, Alumni/Giving)? Is each institution collectively on a single, shared instance or is each institution on a separate instance?
ANSWER: HR & Finance data are somewhat in alignment. Admissions information (core info) is also in alignment, but with additional variables differing by campus. Alumni, Financial Aid, SIS all vary by campus although PeopleSoft (SIS, HR, Finance) is one instance. Advance, TargetX, Tk20/Taskstream are separate by campus.
12. Section 1.1.4 – What is the preferred database platform?
ANSWER: Input will initially be Oracle with SQL Server for the data marts.
13. Section 1.1.4 – Is there a preference for an on-premise or a cloud infrastructure?
ANSWER: We are open to considering either option.
14. Section 1.1.4 – What tools beyond Power BI and Talend (ELT tool) do you anticipate accessing the analytics environment?
ANSWER: Currently, this is the list. Rapid Insight may also get added to the list.
15. Section 1.1.4 – Can the system provide more detail on how the data marts and analytical space will be used? What types of users will be using this space (application developers, data scientists, power users) and what types of analyses will be produced? For example, would this analytical space also be used for structured and ad-hoc reporting?
ANSWER: The analytics space will be firstly for power users in the data space. These include, for example, IT analysts, Institutional Researchers, and analysts in the functional area offices. Developers may also use the space.
16. Section 1.1.4 – Will the selected vendors' consultants work primarily with the System IT office or will they be working with the individual institutions' IT staff as well? Additionally, would the consultant potentially be working with other departments, e.g. Registrar, Admissions, Finance, HR, Financial Aid, etc.?

ANSWER: Primarily with IT staff (there are no campus IT staff, only System). Consultant will work with functional areas to a limited extent, with IT as an intermediary/co-collaborator.

17. Section 1.1.4 – Can UMS briefly describe the team that the vendor will be working with during the project? How many staff members (FTE) will be dedicated to the project to help build the data marts? What are their current skill-sets?

ANSWER: This project will be staffed from existing staff members in IT being—in part—refocused to the data marts project, primarily from the Data, Analytics, and Reporting Technology Services team. An estimate is 1.5-2 FTE.

18. Section 1.1.4 – Is there currently a system wide data governance team?

ANSWER: Yes: an executive DG Council, as well as an advisory group from all campuses/functional areas. For more information, please visit: <https://academics.maine.edu/data-governance>.

19. **Rider A-1 Pricing** states “Instructions – Details in Exhibit 1 will be inserted here during Agreement negotiations. No action needed for Respondent as part of their submission.” Are we required to fill out Exhibit 1 (Table 1) and Exhibit 1 (Table 2) for this submittal?

ANSWER: Yes you are required to complete Appendix C Exhibit 1 Table 1 & 2. Please follow the instructions for Appendix C and place the response as outlined in Section 3.2,.2. Section 2 – Cost Response.

20. If Exhibit 1 (Table2) is required for this submittal, is there a more detailed list of deliverable other than what is said in **Rider A Specifications of Work to be Performed**?

ANSWER: Exhibit 1 Table 2 is only required if you are submitting costs for deliverables and not just hourly rates.

21. How many UMS personnel will be requiring expert guidance and training in Talend under this proposal?

ANSWER: About 10-15

22. How many UMS personnel will be requiring expert guidance and training in Power BI under this proposal?

ANSWER: About 7-15

23. Does UMS currently have any Talend data flows?

ANSWER: A very limited pilot with Open Studio is currently underway. We have none in production

24. Does UMS currently have any Talend driven data marts?

ANSWER: A very limited pilot with Open Studio is currently underway. We have none in production.

25. How many UMS personnel currently use Power BI?

ANSWER: On an enterprise level: zero. We have 5-10 users who have tested Power BI and used it individually.

26. p. 32 Campus Visits: The Contractor agrees to maintain good relations with the University. The Contractor shall make campus visits “as needed” on three days’ notice. The Contractor will coordinate campus visits with the University Services Information and Technology Department to ensure proper communication and sharing of information related to customer projects.

Can you confirm the onsite/offsite requirements for this position? Is this position mainly remote? How many "Campus Visits" are expected? Is there an onsite requirement at the beginning to onboard?

ANSWER: The language provided in Appendix D, Contract for Services, Rider A-1, Campus Visits is specific to onsite visits. We expect that there will be some onsite engagement; yes, onsite at the beginning is preferred, but frequency and length of onsite visits are flexible.

27. Will the University reimburse for travel expenses?

ANSWER: If you charge separately for travel expenses please provide the cost for those expenses in Exhibit 1 Table 1 notes.

28. Are we allowed to submit multiple candidates? If so, is there a limit? (We wouldn't submit more than 3 but want to confirm).

ANSWER: This is your proposal. If you have more than one candidate, feel free to submit their information and rate and clarify. The University has the option of choosing one or more candidates if that is your proposal.

29. What is the high-level nature of data in the Datamart. Is it admissions related, grading related, or other data types?

ANSWER: The first (pilot) project is Admissions-related. From there we will move on the Enrollment & Retention.

30. Is the current data in a file system or a relational database?

ANSWER: Relational Database

31. Should the PowerBI reporting be built on top of any specific database?

ANSWER: SQL Server datamarts created using Talend data integration. Power BI may also be used with transactional databases (e.g., Finance).

32. With 3 day advance notification, the consultant needs to report to the designated campus location. Are the consultant's travel expenses reimbursable by the university?

ANSWER: If travel expenses are separate, please specify. On-site engagement frequency and length is flexible.

33. Will the university absorb any software license costs associated with the project?

ANSWER: Software licensing costs for Talend and Power BI will be directly paid by the university to the vendor. This RFP is for applied training.

34. What percentage of consulting work effort is expected to be performed onsite?

ANSWER: This is flexible. Please note your constraints and recommendations in your proposal.