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CHIEF INFORMATION OFFICER

July 30, 2020

To: All Potential Respondents
From: Steve Dawson, Issuing Officer
Subject: RFP #0720-129-01 – Master Data Management Services

Amendment One

Please amend the subject RFP to include answers to the attached timely received questions. This Amendment One shall supersede, modify and/or change all requirements to the contrary in the RFP and associated documents.

NOTE: The due date for submission of proposals has been extended to August 24, 2020, at 3:00pm.

Section 4.3.7.1 is amended to read:

4.3.7.1 Provide named resources with government agency experience to be present on site in support of the program initiatives.

Section 4.4.8.3 is added to Scored Specifications:

4.4.8.3 Describe your experience in working with a state or federal government environment on a similar project. Explain your efforts in bringing together multiple, distinct agencies to achieve a common project goal.

AMENDMENT #1 - RFP #0720-129-01 MASTER DATA MANAGEMENT

	Section Number (i.e. 1.2.1)	Page Number	Section Text Requiring Clarification	Specific Question / Request	Agency Response
1			General Question	Please share estimate of current stored records that will serve as the source data for this program. (trying to assess volume)	Unkown at this time. Part of this effort is to work with agencies to determine critical data, source systems, and volume.
2			N/A	Please provide an estimate for the number of master data records - pre and post entity resolution / matching.	Unkown at this time. Part of this effort is to work with agencies to determine critical data, source systems, and volume.
3			N/A	Please estimate the data volume expected for egress from the cloud for MDM and BI. Would egress charges need to be included in pricing?	Unkown at this time. Part of this effort is to work with agencies to determine critical data, source systems, and volume.
4			N/A	Please estimate the number of data sources in scope for Phase 3, by location type (on-prem, AWS, other cloud).	Unkown at this time. Part of this effort is to work with agencies to determine critical data, source systems, and volume.
5			N/A	Please estimate the number of master data entities, at a lower grain than Citizen, Provider, and State Services. For example, Provider domain may include education, certifications, affiliations, specialties, facilities, etc.	Unkown at this time. Part of this effort is to work with agencies to determine critical data, source systems, and volume.
6			N/A	How many data stewards would need access to the MDM tool UI? How many technical administrators would need access?	We envision at least one data steward and one technical administrator from each agency. Initially we are focusing on 6 agencies, but this will expand as we expand our efforts.
7			N/A	How many end-users licenses will be needed for the BI tool?	The number of end-user licenses will depend on how the BI tool will be used. This is something that will be determined as part of the project.
8			General question	Has an approved budget been allocated for Phase 2? If so, what is the range of that budget?	

9			N/A	Has budget already been allocated / approved for this MDM and BI initiative? How much has been budgeted? What is the budget for Year 1, years 2 - 5?	There is an approved budget with sufficient funds for all Phases of the MDM project.
10	4.4.8.1.7	32	Experience/Credentials	Is there an approved budget for the project and what is that amount?	
11			General	Please clarify expectations for how master data will be consumed by downstream applications.	The data in the MDM environment will be used by downstream systems as a common area to retrieve data identified as critical for the enterprise. As all agencies gather similar data, the MDM environment will be the repository to hold the master record of that data.
12			General Question	Please provide examples of the type of data governance rules agreed to advance Phase 2?	Data Governance is an effort that is just beginning. Data Governance rules have not been established yet.
13			N/A	Please confirm there are no requirements for real-time ingestion / matching / merging of master data from sources. I.e., would all data ingestion be performed in batches?	The requirements for real-time ingestion/matching/merging of master data will be determined as part of the project requirements gathering process.
14			N/A	Is there any requirement for a data steward to be able to manually match or unmatch records? Or will all matching be performed by an automated algorithm?	Matching will be performed in an automated fashion based on business rules developed by data stewards
15			N/A	Due to the short amount of time between when question responses are received and when the RFP is due, and due to the complexity, criticality, and risk involved with a state-wide MDM and BI initiative, (we) would like to request a 4 week extension in order to provide a more thorough response.	The Agency will extend the due date and time for Proposals to August 24, 2020 at 3:00pm

16			Proposals Due: August 10, 2020 3 PM Central Time	Respectfully, would the State consider extending the August 10 due date by two weeks to afford qualifying vendors additional time to submit a thorough and thoughtful response?	Central Standard Time.
17			N/A	<p>Please confirm that there is no requirement for messaging (Kafka, MQ Series, SOAP, etc) as a source for MDM.</p> <p>Are there any requirements for providing messaging as an output from MDM?</p>	Requirements for messaging will be developed as part of the project requirements gathering process.
18			General Question	Please specify the exact deliverables for the Phase 1 effort underway?	<p>Data Governance Implementation Framework and Roadmap, Data Governance Thought Leadership and Best Practice Coaching and Mentoring, Develop and Deliver Appropriate Data Governance Education, Data Governance Process Assessment, Development and Standardization, Data Governance Charter, Enterprise Information Management Guiding Principles, Data Governance Program Backlog, Definition of the Initial Scope for the Data Governance Program and Pilot Project, Communication/Change Management Plan, Data Governance Org Structure and Org Chart, Process Owner Group, Executive and Work Group Levels formed, Initial Business Glossary, Data Governance Program Pilot, Client Organization Self-sufficient in running its State-wide Managed Data Governance Program</p>
19			N/A	As part of Phase 1 initiative in progress, has the State started to develop conceptual data models in order to identify and understand master data entities and their relationships? If so, what modeling tool is being used? Can you share any such models at this time?	We are focused on people and processes with phase 1 and the development of a data governance process. We have not determined what tools can and will be used. As we progress through Phase 1 and Phase 2, appropriate tools will be determined.

20			General question	Has a repository been selected as part of the Enterprise Data Management initiative or is the State of Iowa open on what to use for a repository?	Not sure what the question is asking. Do we want to use AWS or Azure to host the MDM environment, we would prefer AWS.
21			N/A	Describe the top 3 data technologies (BI, ETL, database, etc) at use in IDPH, DHS, DOE, IDR, DOC and IWD? For example, what is the most prevelant BI tool in use currently in these agencies?	The most prevelant BI tools are Tableau and Power BI.
22	0	2	"The minimum Number of Days (120) following the deadline for submitting proposals that the Respondent guarantees all proposal terms, including price,will remain firm: "	Is there any possibility of considering an exception for reducing the number of days?	The Agency will not consider such an exception.
23	1.3	6	Background Information	Is there an expectation on approximate data volume and source systems across all agencies/departments to be considered for this proposal?	There is no expectation at this time. The volume of data and sources systems will be determined as part of this project.
24	1.3	7	Background Information, Phase 3	What are approximate volumes of data (in Terabytes) anticipated coming in across all files/sources for the domains identified so far (citizen, provider, etc)?	The volume of data will be determined as part of this project
25	1.3	6	The role of the OCIO is to support agencies in these important efforts, but also to prioritize a "one team" approach to information technology investment and administration.	Is the expectation initially that other agencies will have access to the established MDM platform or is the platform limited to OCIO user base only?	Once established, other agencies will have access to this data.

26	1.3	7	Background Information, Phase 3	How many sources of data are anticipated for the initial phase (citizen, provider, etc)?	The number of sources will be determined as part of this project.
27	1.3	7	Background Information, Phase 3	Is it one source per identified agency, or could be multiple feeds?	There will be multiple sources per agency. However, the number of sources will be determined as part of this project.
28	1.3	7	Background Information, Phase 3	What are the number of users?	There is no clear number of users at this time.
29	1.3	7	Background Information	How many work streams does the State expect to be defined with in the year contract?	The number of workstreams will be determined as part of this project.
30	1.3	7	Background Information, Phase 3	Is there a need for a data lab (sandbox) environment to be able to easily integrate data into the system for analytics but not affect the production data sets (E.g. per your Covid reference)?	Yes
31	1.3	7	Background Information, Phase 3	Is there a desire to have matching on the citizens to try and match the citizens across the agency as you add more agencies into the system? This was not called out as a requirement.	Yes
32	1.3	7	Background Information, Phase 3	Is there a requirement for temporal data storage capability in the data store to be able to do what if scenarios on the data to allow for viewing of historical data reference points in a what if/what was scenario?	Yes

33	1.3	7	Background Information, Phase 3	Are there requirements for the data history to be stored for a period of time?	There is no requirement for data history at this time.
34	1.3	7	Background Information	Does the state have established data standards based on the topology of the data?	There may be data standards within each of the agencies, but there is not a central location for data standards
35	1.3	7	"Entity resolution"	Is there any requirement for address validation to be performed i.e., validating that an address received is an actual valid address with the USPS?	Yes
36	1.3	7	Can you please clarify on "Establishes the governed data sharing area technical environment to support the implementation of data governance including data quality, standardization, and integration."	Is Phase 2 limited to the establishment of infrastructure, environment and framework only or is Phase 2 implementation as well for prioritized data sources and elements?	Phase 2 is establishment of infrastructure, environment, and framework
37			N/A	Can the Phase 1 vendor bid on the Phase2 and Phase 3 work?	The contractor is People Services Center, Inc, dba Catch Intelligence. The Issuing Officer and evaluation committee will evaluate all Proposals received by the standards set forth in the RFP, including Section 2.18, and the Certification Letter provided by each Respondent.
38	1.3	7	Background Information, Phase 1	Can you identify the contractor who worked on the Phase one in developing the data governance? Are they precluded from bidding on this?	
39	1.3	7	Background Information	Who is the vendor that has been chosen to complete Phase 1 and are they permitted to bid on the subsequent phases?	
40			General Question	Which Firm is working with State of Iowa to complete Phase 1?	

41	1.3	8	The state of Iowa has already taken the first steps for enterprise data management by evaluating the current data landscape and engaging with a partner to develop the data governance structure, practices, and policies that will lead to well governed data across the enterprise.	Who is the partner chosen to complete Phase 1? Is the partner/vendor selected for Phase 1 precluded from participating in Phase 2 and/or Phase 3 (current RFP)?	
42	1.3	8	First full paragraph: The state of Iowa has already taken the first steps for enterprise data management by evaluating the current data landscape and engaging with a partner to develop the data governance structure, practices, and policies that will lead to well governed data across the enterprise	Again, due to the importance of this foundational work it would be beneficial to understand 1)Who the partner is that you have engaged in this separate work, and 2)Will they be allowed to respond to this RFP?	
43	1.3	7	Phase 1 (end of paragraph): The data governance strategy defined and implemented in this phase sets the framework for all data management and analytics expansion across the enterprise. A key deliverable of this phase will be Iowa's enterprise definition and associated metadata of identified entities to enable the initial mastering of Iowa's data. This phase has already begun and will be worked as a separate effort.	Because of the significance of this foundational work, is it possible to obtain: 1) a status of this separate work 2) an anticipated completion date of this work, and 3) any documents (final, near final or draft) that would support a more comprehensive response to this RFP – specifically regarding the governance strategy, structure, processes, procedures and policies?	The phase 1 effort is in the beginning stages, so this information has not been developed yet. It is expected that the selected vendor will work with the phase 1 vendor as work progresses.
44	1.3	7	"The governed data sharing area allows access to data from source systems or from 'fit for purpose' datamarts built to meet business analytic needs."	Would the governed data sharing area include storing transactional data to enable analytics (analytics generally needs master data and transactional data)? Would 'fit for purpose' datamarts be stored in the state governed data sharing area?	Initially, no. However, as the environment evolves and the needs of the agencies become clear, yet it will include transactional data.

45	1.3	7	"The governed data sharing area allows access to data from source systems or from 'fit for purpose' datamarts built to meet business analytic needs."	Is there a preferred storage mechanism (RDBMS, Hadoop, etc) for storing the detailed transactional data in the governed data sharing area?	The preferred storage mechanism would be RDBMS.
46	1.3	6	Background Information (bottom of 2nd paragraph) To advance this approach, the OCIO supports flexibility for independent agency IT decision-making, but also seeks to align and unify certain elements of the State of Iowa's information technology portfolio where efficiency and uniform citizen interaction are paramount considerations. Through the work associated with this RFP, the Contractor will assist the OCIO in this mission	Are there any enterprise class tool sets (ETL, Data Discovery, metadata development tools, visualization tools, etc.) that the State would like to standardize on in support of the CIO's vision? Having a better understanding of what tools the agencies use and are skilled in as well as future tool selection direction, would help define the expertise we will bring within our response and proposed solution.	We are prepared to evaluate any tool that is appropriate for the success of this effort.
47	1.3	7	"The governed data sharing area allows access to data from source systems or from 'fit for purpose' datamarts built to meet business analytic needs."	Is there an existing preferred ETL tool to populate the governed data sharing area?	There is no preferred ETL, however most agencies have an ETL tool they are currently using.
48	3.1	21	Instructions	Are there any response page limits?	Respondents are not limited in proposal length.
49	3.1.1	21	The Proposal shall be sent in digital format via email to the Issuing Officer.	Please specify the format of the digital submission: MS Word or PDF?	The preferred format is .pdf files.

50	3.2.9	22	...if the Respondent takes exception to a provision of any such Terms and Conditions, it must identify any such provision by page and section number, state the reason for the exception, and set forth in its Proposal the specific language it proposes to include in place of the provision. Such exceptions must be submitted as Attachment 5 to Respondent's Proposal.	If our firm takes no exceptions, do we need to submit Attachment 5? If so, what components of Attachment 5 need to be completed and submitted? Just page 52 and 53? Or do we need to also include completed pages 54-126?	If a Respondent does not include any exceptions as Attachment 5 of its Proposal, it means that the Respondent takes no exception to the terms and conditions contained either in the RFP or the sample terms and conditions document (Attachment 6 of the RFP) and, if selected, foregoes further negotiation on those terms in subsequent contract negotiations. If a Respondent does list exceptions to the terms and conditions, they should be in a separate document listed by page, section number, and include both original and proposed language as part of the exception. Alternately, exceptions may be presented in a redline format, but only include those pages where exceptions are being requested, not the entire Attachment 5.
51	6.1	36	By submitting a Proposal, Respondent acknowledges its acceptance of the terms and conditions of the RFP and the Terms and Conditions without change except as otherwise expressly stated in its Proposal. If the Respondent takes exception to a provision, it must identify it by page and section number, state the reason for the exception, and set forth in its Proposal the specific RFP or Terms and Conditions language it proposes to include in place of the provision.	As an option for presenting proposed language changes to Attachment #5: Terms and Conditions of the RFP, may respondents provide a copy of Attachment #5 Terms and Conditions within their response showing the proposed changes in redline format? We believe that for any proposed changes to the contract terms, this would be the easiest and most effective way for the OCIO to review those requested changes.	
52	4	24	Technical Requirements	Do the Agencies have additional requirements for MDM?	Not at this time
53	4.3.1.1	25	Provide a fully integrated platform that can support Iowa enterprise master data management (MDM) as well as future data management, data analysis, and data visualization and reporting capabilities.	Will the selected bidder be responsible for integrating source and target systems with the proposed solution or will this work be done by State personnel? Can we assume that the scope of the implementation is limited to MDM at this point for the purpose of bidding, but we must demonstrate the ability to expand the solution in future implementations to incorporate data management, data analysis, data visualization and reporting capabilities?	It will be done by state personnel with the assistance of the vendor. Yes, the scope of the implementation is limited to MDM, but the ability to expand must be demonstrated.
54	4.3.1.1/ 4.3.4	25	Provide a fully integrated platform that can support Iowa enterprise master data management (MDM) as well as future data management, data analysis, and data visualization and reporting capabilities	Please clarify if the data visualization and reporting needs are based on mastered data elements only from MDM hub?	Yes, data visualization and reporting needs are based on mastered data elements from the MDM hub.

55	4.3.1.2		Enterprise Data Management	Are you asking for the before and after tracking on what are the variety of input records and what was created as the "golden record"?	Yes
56	4.3.1.3	25	Design and implement a data model for the master record at the direction of the Agency	Please share a sample desired state data model that is under consideration	There is not currently a state data model. Part of this effort will be to develop the needed data models
57	4.3.1.4	25	Review data sources to determine the best data to utilize for the data integration hub.	How many sources do you anticipate will be involved in this project? Approximately what volume of source records will be included? Will real-time feeds into the solution be required? Will there be a need to feed MDM master data to other downstream systems, and if so, how many?	Number of sources and volume will be determined as part of the project.
58	4.3.1.8	25	Enterprise Data Management	What's the scope of data lineage needed? i.e. is this about a cross reference showing the source origin of each attribute that constitutes the golden record, along with an audit trail of how it changed in MDM? Or something different?	It is the reference showing source origin and changes in order to comply with data governance and MDM requirements
59	4.3.1.8	25	Provide a Solution that maintains and visualizes data lineage	Is there an expectation to propose a separate Data Lineage and glossary tool as part of this response?	No
60	4.3.1.8	25	"Provide a Solution that maintains and visualizes data lineage."	Is this lineage just for MDM, BI, or both?	MDM
61	4.3.2.10	26	Provide a Solution that can identify entities through geospatial relationships.	Does geospatial refer to where an individual lives vs. where they work?	Geospatial refers to the location data associated with data in a given system. It can be where a person works or where a person lives. It depends on the system collecting the data.
62	4.3.2.10	26	Provide a Solution that can identify entities through geospatial relationships	Can you please provide an example use case for this?	The following use case is very high level. Iowa Department of Revenue wants to send John Doe a tax notice but does not have the valid address. So IDR source system queries the MDM Hub. The MDM hub matches John Doe

63	4.3.2.10	26	"Provide a Solution that can identify entities through geospatial relationships."	Please provide an example use case.	MDM Hub. The MDM hub matches John Doe to an address but also has data that indicates that John Doe is dead. The MDM hub sends the death data back to IDR.
64	4.3.2.10	26	Provide a Solution that can identify entities through geospatial relationships.	Does the agency already have the sourced data for the geospatial relationship or is this required for the proposed solution?	There are geospatial relationships in source systems currently. However, not all source system contain geospatial data.
65	4.3.3	26	Data Quality	Is there a preference to use existing tools or architectural elements (e.g. ESB)for Data Ingestion and Data Quality or should proposal include these tools and platforms?	The proposal should include tools and platforms
66	4.3.3.1	26	Provide a Solution that provides the ability to analyze data relationships and complete validation routines.	Does "relationships" refer to across citizens, such as a son living at home? What type of validation routines are you looking for? Is this data edits?	Relationships are across citizens. Validation routines should ensure that the data being validated is accurate and sound.
67	4.3.3.1	26	Provide a Solution that provides the ability to analyze data relationships and complete validation routines.	Is this requirement for analyzing data relationships about discovering relationships in the data across sources in order to integrate data or about analyzing complex hierarchical relationships (e.g., variable depth/ragged hierarchy), or both?	Both
68	4.3.4	26	All data visualization and analytics requirements	Do the requirements in this section pertain to visualizations and analytics on the data and data movement processes or is it focused on the end user reporting off of the data contained in the solution's repository/DW?	It is focused on the end user reporting of the data
69	4.3.4	26	Data Visualization and Analytics.	How is the State going to evaluate which BI tools should be used and which BI tools are the other Agencies using?	Tool evaluation will be conducted by representatives of the agencies
70	4.3.4.1	26	Data Visualization and Analytics Provide a Solution that gives users a visualization of data.	Can you be more specific on the types of visualizations to which you are referring? Are you looking for visualizations tools such as a Tableau or just views to the data? This reflects back to the usage of the MDM tool vs. an analytic tool set.	The goal is to eventually use the data in the MDM in an analytic capacity. Visualization tools refer to tools such as Tableau, Power BI, Dundas, etc.

71	4.3.4.1	26	Provide a Solution that gives users a visualization of data.	Is the expectation that data visualization will include transactional data during the initial implementation project or will this be part of a future implementation?	It is not anticipated that transactional data will be included during the initial implementation
72	4.3.4.1, 4.4.4	26	Data Visualization tool	Is there a preference for a specific data visualization tool?	Tool selection will be part of this project
73	4.3.4.2	26	Data Visualization and Analytics Provide a Solution that allows drill down functionality to be added to reports.	Are you looking for reporting of the data or some type of Visualization tools such as Tableau or Microstrategy? If so, does the State have a preference or current licenses and experience for Data Visualization tools? Can you be more specific in the types of drill down capabilities that you are looking for.	Tool selection will be part of this project
74	4.3.4.3	26	Provide a Solution that provides "what if" scenarios, forecasting, and open source integrations.	Are you looking for an analytics and forecasting solution? What type of forecasting – can you provide examples?	There will be an eventual need for analytics and forecasting, but not part of the initial project
75	4.3.4.3	26	"Provide a Solution that provides "what if" scenarios, forecasting, and open source integrations."	Please provide examples of "what-if" scenarios desired? For open source integrations - do you mean data integration (e.g., integrate data from data.gov), application integration, or both? Please provide example use cases.	"What if" scenarios refers to the ability to determine what will be the outcome if one or more variable data elements change.
76	4.3.4.4	26	Provide analytical services after entity resolution has been completed.	To what type of analytic services are you referring? Analytical capabilities to evaluate the data once it is loaded? If so are there specific types of analytics that you would like to do? E.g. AI, ML, R, Python, Pathing, Pattern). Or is this more simplistic and just analytics of what has successfully matched and what is outstanding/needs to be further evaluated.	What has successfully matched and what is outstanding/need to be further evaluated

77	4.3.5.4	26	Demonstrate the extensibility of the MDM hub for support of the operational and policy decision analytic solutions and the value of MDM implementation to those solutions.	Please indicate the meaning of "demonstrate" and what the expectations are? Are you looking for the MDM Hub to be an analytical ecosystem and the MDM capabilities are just a component of that?	The vision is that the MDM hub will mature into an analytical ecosystem, however initially the identification and implementation of common critical data elements will be the main focus
78	4.3.5.5	27	Demonstrate the extensibility of the MDM hub for rapid response (e.g. disease response, emergency management, natural disasters, etc.) related data solutions.	Can you explain what is meant by "extensibility"? Does this mean adding new master data sources, adding additional transactional data related to existing sources, something else?	This means the ability to quickly ramp up new data sources and data in the event of an emergency like Covid 19
79	4.3.5.6	27	Provide a Solution that returns 90% of all queries in under 2 seconds	Please share guidelines and scenarios for this requirement. Is this relating to a direct search of the actual MDM Hub?	This is related to the direct search of the MDM hub
80	4.3.6	27	Hosting/Security	Are there any security requirements needed for the underlying data repository – e.g. row or column security	That will be determined as part of the project
81	4.3.6	27	Hosting/Security	Are there agency specific views that need to be enabled to allow restriction of certain users to be able to query on the data?	Yes
82	4.3.6.1	27	"Provide a secure way of sharing secure documents and data samples."	Is this requirement just for project work / dev team collaboration, or would this be an integral part of the solution? For example, would business / end users need to be able to share secure documents using the solution? Please provide some example use cases.	This requirement is for Project work/Dev team collaboration
83	4.3.6.2	27	Hosting/Security	Will data stewards/users of the MDM tool be across different agencies? What are the considerations for connectivity and security as it relates to that?	Yes, they will be across different agencies. Security should be developed to limit users only do the data they are authorized to access.
84	4.3.6.2	27	Host/Security	What impact level of FEDRAMP is required, low, medium, or high?	Medium

85	4.3.6.2	27	Host/Security	Is it anticipated that Iowa will be using their own AWS/AZURE subscription, or will the vendor be expected to provide it?	The vendor will provide as part of the proposal
86	4.3.6.2	27	Host/Security	Given that the state is requesting hosting in a cloud environment and there are no specific terms regarding the provision of cloud services, can a respondent propose its standard cloud terms or does that violate the restriction on proposing our own set of terms and conditions causing rejection of the proposal?	Vendor will follow the state's cloud policies
87	4.3.6.2	27	Host/Security	If Respondent utilizes a public cloud provider for the hosting services, do the terms relating to subcontractors (such as ability to inspect premises and perform testing/audits) apply to the public cloud providers?	Yes
88	4.3.6.3	27	Hosting/Security	Does the State of Iowa have any agreements with the preferred Cloud provider?	The state has no preferred cloud provider.
89	4.3.7	27	Project Management/Staffing/Timeline	Does the State have PMI Certified PMs to manage the state effort?	The state will provide a PM for this effort
90	4.3.7.1	27	Provide named resources with Iowa specific government agency experience to be present on site in support of the program initiatives.	We understand the desire for the State to utilize resources who already have specific experience with Iowa agencies, but making this a mandatory requirement could result in some otherwise highly qualified Respondents from being able to participate. Would the State consider moving this requirement to the Scored Technical Specifications?	Section 4.3.7.1 is amended to remove the words "Iowa specific". A scored specification will be added to allow Respondents to detail their government project experience.
91	4.3.7.4	27	Provide a ticketing and tracking system accessible by state resources for project management	Please clarify on scope of items to be ticketed and tracked for project management.	Project issues, risks, tasks, etc. should all be ticketed and tracked as part of the project management process
92	4.3.7.13	28	Project Management/Staffing/Timeline	Has the State considered using ADKAR or another Change Management methodology for this effort?	No, the state has not considered using ADKAR

93	4.3.7.16	28	Provide a timeline that identifies future work streams and effort for the expansion of the solution. The timeline and designated agencies will be mutually agreed upon by the Agency and the Contractor.	Is it the State's expectation that Offerors provide a proposed timeline for Phase 2 and Phase 3 as part of our proposal?	Yes
94	4.3.8.3	28	"Provide a Data Universal Numbering System (DUNS) number. This number will be used as a method to verify data about the organization."	Is this requirement specifying that a feed to do DUNS lookups will be included in the cost, or does the state already have a DUNS feed/service which we would need to use?	DUNS should be included in the cost
95	4.4.1.10	29	Describe how you will provide web service access to the data in the Solution.	Are there near real time/real time requirements for source changes? Similarly, near real time considerations for consumption of the master data?	Real time requirements are not part of the initial effort
96	4.4.1.10	29	Describe how you will provide web service access to the data in the Solution.	Are records date and time stamped?	Yes
97	4.4.3.3	30	Describe how the proposed Solution will standardize data.	Does Iowa OCIO own an address standardization tool, or should the vendor include one as part of their response? If owned, which tool is it?	The vendor should include as part of their response
98	4.4.4.3	30	Describe how the Solution will provide "what if" scenarios, forecasting, and open source integrations.	Please clarify if this relates just to the MDM hub data or if proposed should include a separate reporting functionality with this functionality?	This relates to the MDM hub data, in conjunction with other critical data, to provide predictive analytic capabilities
99	4.4.5.5	30	Describe how you will demonstrate the extensibility of the MDM hub for rapid response (e.g. disease response, emergency management, natural disasters, etc.) related data solutions.	Are you looking to derive analytics related to the MDM hub? Please elaborate on the use case. Are you looking to leverage the MDM hub as an analytical ecosystem?	The MDM hub will be used, in conjunction with other critical data, to provide analytics
100	4.4.5.6	30	"Describe how the Solution will return 90% of all queries in under 2 seconds"	Is the 2 second requirement limited to master data queries or does this include analytics queries across millions/billions of transactions?	Master data queries
101	4.4.6.6	31	4.4.6.6 Describe the process by which the Agency will be able to administer and manage authorized users in the system.	Does Iowa have an existing Security Assertion Markup Language (SAML) identity provider?	The State is currently in negotiation with an SAML provider. We reserve the right to identify the successful provider if and when those negotiations are concluded.

102	4.4.5.4	31	Describe how you will demonstrate the extensibility of the MDM hub for support of the operational and policy decision analytic solutions and the value of MDM implementation to those solutions.	Please clarify if the proposal should include a Proof of Concept use case for demonstrating this capability.	Proof of concept use case is acceptable
103	4.4.5.7	31	"Describe how the Solution will return 90% of all queries in under 2 seconds"	How many users would be querying the MDM service directly? How many concurrently? How would the number of users increase past year 1?	The number of users will be determined as part of the project
104	4.4.5.7	31	"Describe how the Solution will return 90% of all queries in under 2 seconds"	Please provide an estimate as to how much transactional and master data (estimated number of records) will be needed to support analytics?	The volume of data will be determined as part of the project
105	4.4.5.8	32	"Describe how the Solution will return 90% of all queries in under 2 seconds"	How many analytics users for the BI tool will need to be supported? How many concurrent BI tool users?	That has not been determined
106	5	33	Evaluation and Selection	What are the overall percentages of the evaluation given to the Technical and the Cost Component? Example, Technical component represents 80% of the evaluation and cost component represents 20%.	The breakdown for scoring will be released on the proposal due date.
107	6.3.3	40	Insurance	Can you clarify the amounts of insurance coverage the Respondent is required to carry? Section 6.3.3 of the RFP lists standard amounts carried by commercial companies while the Special Terms and Conditions – Insurance Requirements lists significantly higher amounts for the same types of coverage with no statement of which is to control over the other.	

108	6.3.3 + Attachment #5, Special Terms and Conditions #00X Insurance Requirements	40 + 125	<table border="1"> <thead> <tr> <th colspan="3">Requirements Samples from Document</th> </tr> <tr> <th></th> <th>Section 6.3.3</th> <th>Attachment #5, Special Terms and Conditions #00X Insurance Requirements</th> </tr> </thead> <tbody> <tr> <td>General Liability</td> <td>General Aggregate - \$2 million</td> <td>General Aggregate - \$15 million</td> </tr> <tr> <td>Automobile Liability</td> <td>Combined single limit - \$1 million</td> <td>Not listed</td> </tr> <tr> <td>Excess Liability</td> <td>Each Occurrence - \$1 million Aggregate - \$1 million</td> <td>Each Occurrence - \$5 million Aggregate - \$15 million</td> </tr> <tr> <td>Technology Errors and Omissions Insurance</td> <td>Each Occurrence - \$1 million</td> <td>Each Occurrence - \$5 million Aggregate - \$15 million</td> </tr> <tr> <td>Property Damage</td> <td>Each Occurrence - \$1 million Aggregate - \$1 million</td> <td>Not listed</td> </tr> <tr> <td>Workers Compensation</td> <td>As Required by Iowa law [\$2 million]</td> <td>\$2 million</td> </tr> <tr> <td>Cyber Liability/Network Security</td> <td>Not listed</td> <td>Each Occurrence - \$15 million Aggregate - \$15 million</td> </tr> </tbody> </table>	Requirements Samples from Document				Section 6.3.3	Attachment #5, Special Terms and Conditions #00X Insurance Requirements	General Liability	General Aggregate - \$2 million	General Aggregate - \$15 million	Automobile Liability	Combined single limit - \$1 million	Not listed	Excess Liability	Each Occurrence - \$1 million Aggregate - \$1 million	Each Occurrence - \$5 million Aggregate - \$15 million	Technology Errors and Omissions Insurance	Each Occurrence - \$1 million	Each Occurrence - \$5 million Aggregate - \$15 million	Property Damage	Each Occurrence - \$1 million Aggregate - \$1 million	Not listed	Workers Compensation	As Required by Iowa law [\$2 million]	\$2 million	Cyber Liability/Network Security	Not listed	Each Occurrence - \$15 million Aggregate - \$15 million	There is a discrepancy between the insurance requirements in the two sited sections. Are Respondents to consider only the amounts indicated in Section 6.3.3 and not the amounts in Attachment #5? Please clarify the correct insurance requirements.	The insurance coverages listed in Attachment #5: Terms and Conditions (page 125 of the RFP) are expected of the Contractor. Those listed in Section 6.3.3 (page 40) are for a project of smaller scope and should have been changed to reflect the amounts listed in Attachment #5.
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109	6.3.3	40	Insurance	Has the Office of Information Technology imposed the Special Terms and Conditions Insurance Requirements in the past and, if so, what was the type and duration of vendor work performed?	As each project is unique, the insurance requirements used in prior work by Agency contractors has no bearing on this procurement. If a Respondent wishes to make exception to the requirements listed in the Terms and Conditions, it is encouraged to list those exceptions in its Proposal.																											
110	6.3.4 Attachment 5	40	Performance Security Section 4.7	Can you clarify the retainage percentage that the state intends to apply? Section 6.3.4 of the RFP indicates 10% while Section 4.7 of the Terms and Conditions in Attachment 5 indicates 15%.	The security amount listed in Section 6.3.4 of the RFP will prevail.																											
111	6.3.4	40, 67	6.3.4 Performance Security	There is an internal conflict in the retainage percentage, 10-15%, which one is the right one?																												
112	Attachment #1: Cost Proposal	42	I. Payment Terms	In Attachment #1 Cost Proposal, I. Payment Terms, the State asks about what discounts will be given for payment in 15 and 30 days. Is this information evaluated as part of the Cost Proposal? If so, how?	It is not evaluated as part of the scoring; we are requesting that information for informational purposes.																											

113	Cost Proposal	43	"Data Cleansing"	As the specific data needed hasn't been identified yet, can we base pricing on assumptions but then be able to perform hourly billing ("optional hourly rates") if the complexity and number of data sources exceed our assumptions?	Yes
114	3	60	Services and Deliverables.	No specific Deliverables have been identified in the RFP, when will they be defined?	The expectation is that the deliverables will be developed as part of the Statement of Work
115	11.1.4	88	"Vendor may permit Vendor Personnel to access Customer Data remotely only as required to provide technical support. Vendor utilize a Follow-the-Sun model when providing technical user support on a 24/7 basis."	Does this mean that all work except for technical user support must be performed on-site? I.e., all development must be performed by vendor personnel on-site? Per 4.3.7.15 "Use only personnel authorized to work in the United States" - does this preclude using off-shore resources for "Follow-the-Sun" technical support?	All individuals that work on this project must be authorized to work in the United States, must be located in the United States, and must be able to work on site as requirements dictate.
116	11.2.1	88	"Import and Export of Data. The Agency or its Authorized Contractors shall have the ability to import or export data or information, including Customer Data, in whole or in part to or from the System(s) at no charge, and in such formats as may be acceptable to the Agency, without interference from Vendor."	Can we assume that the data formats would be limited to the data formats supported natively by the tool or developed as part of this initiative? For example, if an export in a specialized format such as RDF/OWL is needed, these will be identified in advance so that interfaces can be developed as part of this initiative?	Yes
117	3.1	121	Service Levels	Are the 4 levels for support response times and support status updates solely for reporting purposes (i.e., buckets), or will certain types of deliverables be tied to a certain service level?	The sample SLA in the attached Terms and Conditions are default terms. Respondents are encouraged to submit their standard SLAs as part of the exceptions process.
118	4.3 and 4.4	25-32	4.3 Instructions	Is it acceptable to answer just yes or no in section 4.3 and then put the detailed answers on how the respondent meets the specification in section 4.4? And then only include detailed answers in 4.3 that are not in section 4.4? Or is it expected that full answers will be in both sections even if they are duplicative?	Responses to the Mandatory Requirements in Section 4.3 should be a "Yes" or "No". Responses in Section 4.4 should include detail sufficient to fully address each specification listed.

119	2.25 5.1	17, 33	2.25 Evaluation of Proposals Submitted 5.1 Introduction	RFP Sections 2.25 and 5.1 both state that the Agency will not necessarily award a contract resulting from this RFP to the respondent offering the lowest cost. Instead, the Agency will award the contract(s) to the responsible respondent(s) whose responsive proposal the Agency believes will provide the best value to the Agency and the State. However, in Section 5.4.2, the RFP states, "The least expensive Cost Proposal shall receive the maximum number of points available." The former statements appear to describe a best-value trade-off procurement while the latter describe a lowest-price-technically-acceptable procurement approach. These are two different procurement approaches. Which approach is the State actually using?	Points are awarded separately for the Technical Proposal and the Cost Proposal. All points received for the Technical and Cost Proposals will be totaled for the Respondent's total score, the highest of which will be awarded the contract, pending successful completion and execution of an agreement. The RFP Section cited here relates to the Cost Proposal only.
120	11.2.3.1	88-89	"This includes Federal Risk and Authorization Management Program (FedRAMP) certification for a System hosted in a cloud environment."	FedRamp compliance isn't listed as a mandatory requirement in section 4.3. Is FedRamp compliance and third party attestation a mandatory requirement for this RFP?	It is not a mandatory requirement for the RFP.
121	11.2.3.2		"In addition to the requirements in Section 11.2.3.1, Vendor may also, at its own cost, provide any of the following:..."	Multiple certifications e.g., ISO/IEC 27001: 2005 are listed. Are any of the certifications / assessments under 11.2.3.2 mandatory? Appears these are optional.	They are optional, but may be submitted to the Agency as further proof of security and compliance efforts.
122	11.3.5	91-92	"In addition to the requirements in Section 11.2.3.1, Vendor may also, at its own cost, provide any of the following:..."	Could the NDA and Confidentiality documents be shared with the bidders prior to the submission of the bids and would these be open to redlines or negotiation?	These documents are not being shared prior to submission of the bids. The documents will be open to limited negotiation.