Request for Bid (RFB): New York State (NYS) Statewide Longitudinal Data System (SLDS) Data Governance Program Development Support Statement of Work (SOW)

The University of the State of New York – Regents Research Fund (USNYRRF)

Vendor Questions & Answers
Questions were due to USNY-RRF on December 3, 2024.
Answers were due to vendors on December 6, 2024.

#	Vendor Questions for RFB#	USNY-RRF Response
1	Can USNY-RRF please provide a full definition and expectations of the term fiscal agent?	Deliverable 001: "Act as Fiscal Agent: Establish mechanism for accepting RRF funds that will be distributed for Data Governance Program Convenings." In the above, the term "fiscal agent" is described as a third-party entity responsible for managing and disbursing funds on behalf of another party (the SLDS team). The fiscal agent will be entrusted with a prescribed amount of SLDS funding to handle all fiscal arrangements related to travel, lodging, and other related costs for the convenings that will include other key state stakeholders, which may include SLDS data governance experts from other states. The primary goal is to provide seamless planning, booking and execution of the travel itineraries, including vendor payments and traveler reimbursements.
2	Cost Proposal: Is there an expected budget range for the project?	The expected budget range is between $40,000 to $60,000 for this RFB.
3	Cost Proposal: Should the budget include the cost of the Data Governance Convenings (Deliverable 2) and the cost of the marketing campaign (Deliverable 5)?	No. Only include the consulting organization's costs for "doing the work" involved in meeting deliverables; for example, coordination, facilitation, and the development of materials to successfully manage that coordination and facilitation.

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4	Timeline: Is it possible to extend the timeline for development through January 2025?	Adjustments to the deliverable development milestones can be negotiated with the winning bidder. We are open to timeline adjustment, but we are also eager to start this important work. If you believe that timeline adjustments are warranted, please thoroughly explain and justify such proposed adjustments in your bid narrative.
5	General: Will a rubric be utilized to score the RFPs? If so, will a copy of the rubric be provided to vendors?	Yes, a rubric will be used for scoring. It is not being shared with vendors at this time.
6	General: Can generative artificial intelligence (AI) tools be used in this project? Does NYS have guidelines or restrictions on the use of generative AI?	Yes, A.I. tools can be used in this project, if such use meets the Department's policy guidelines—which can be shared with the winning bidder, as they are internal to NYSED. Personally identifiable information, such as names and email addresses involved in any communications or documentation, should be kept separate from A.I. tools and use.
7	Deliverable 3: Are the dates set for the Data Governance Convening as per the timeline (April 10 and July 17) or will they be determined based on polling agency partners for open days/times?	The dates for the in-person Data Governance Convenings are not yet set. Dependencies for stakeholder partners regarding dates/times will need to be considered. We encourage bidders to describe how they would manage the scheduling process.
8	Will the consulting organization be able to convene additional virtual meetings to develop specific policies related to data governance in addition to the two in-person Data Governance Convenings?	Yes, absolutely. The consulting organization will work closely with the SLDS team.
9	Approximately how many participants are anticipated for each Data Governance Convening?	Between 20-50 participants.
10	Are there specific participants identified for each Data Governance Convening?	Yes.
11	Approximately how many participants will require an overnight stay to participate in each Data Governance Convening?	Approximately 20.

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12	Will the Data Governance Convenings need to be video-taped? If so, do transcripts need to be produced that are accessible to those with disabilities (Section 508 compliance with the Americans with Disabilities Act)? Will the video recordings need to be hosted by the vendor? Will the video recordings need to be accessible by the public? Could videos be hosted on YouTube or Vimeo?	No.
13	Do you anticipate needing American Sign Language or other language interpreters for the Data Governance Convenings? If so, will the vendor be required to contract for those services?	No.
14	Will there need to be an option to accommodate virtual participants at the Data Governance Convenings, or will all participants be required to attend in-person?	To be determined; however, NYSED can provide virtual meeting accommodations.
15	Do you have a preferred venue in New York City for the Data Governance Convenings?	No. However, USNY-RRF and NYSED may have access to options.
16	Could the Data Governance Convenings be held in venues other than in New York City?	Yes. In fact, USNY-RRF is open to considering Albany, NY as the optimal location. We encourage bidders to provide a rationale for the location(s) they propose to use.
17	Is it expected that both Data Governance Convenings will be held in the same location and venue?	No.
18	Will the Data Governance Convenings be subject to New York's Open Meeting Law?	At this time, no; however, that may change during the development process.
19	Will the contractor be expected to send public notices for the Data Governance Convenings?	If and when necessary, USNY-RRF will handle public notice.

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20	If the Data Governance Convenings are open to the public, how much capacity should be planned for public attendance at the two convenings?	At this time, this is not applicable. If the development of this program and the meetings constitute a Public Body, then we will organize with the winning bidder.
21	Will the vendor be required to provide all office supplies needed for the Data Governance Convenings? For example: Note pads, writing pens, markers for the white board, voting stickers, participant folders with relevant materials, etc.?	Bidders are encouraged to include necessary materials in their budgets, and to provide a rationale for such materials. For note-taking, participants can supply their own writing/paper materials. We would prefer to focus on paper-less when possible.
22	Deliverable 5: Could you provide more context on the "development of marketing materials"?	When possible, we want the development of the SLDS to be transparent to the public. While this does not involve all details "behind the curtain," we are keen on the SLDS program developing materials to accompany big milestone decisions, such as those regarding "how did we develop the SLDS Data Governance Program," with details like a fact sheet that can be offered online for all stakeholders and the public to understand more about the program, its origin, and its goals.
23	Deliverable 5: Will the vendor be responsible for providing the content (text, images, data, etc.) for the marketing materials?	The consulting organization will work closely with the SLDS team to make these decisions. Deliverable 5 should be achieved through collaboration, where the consulting organization is expected to have access to expertise and resources that a state agency may not have readily on hand.
24	Deliverable 5: What types of marketing materials are expected to be developed (brochures, flyers, digital content, social media posts, banners, email campaigns, etc.)?	See #22 and consider Appendix A. Some of the marketing work and expectations are included in NYSED's SLDS grant application: https://nces.ed.gov/programs/slds/state.asp?stateabbr=NY
25	Deliverable 5: Who is the intended audience for the marketing materials (general public, specific industry, potential clients, stakeholders, etc.)?	Other key stakeholders not directly involved, to provide transparency, and the general public.
26	Deliverable 5: Are there existing branding guidelines or a style guide that must be followed, including logos, color schemes, fonts, and messaging tone?	No. The consulting organization will work closely with the SLDS team to make these decisions.

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27	Deliverable 6: Is there a specific file sharing platform the vendor is required to use (i.e. Sharepoint, Google Workspace, etc.)? Or will the vendor be expected to provide a file sharing platform to facilitate review of draft documents? If so, are there information technology requirements the vendor must adhere to?	The SLDS team makes use of SharePoint and Atlassian tools, such as Jira and Confluence, and uses MS Teams for close collaboration. The team has already worked through challenges regarding access to different networks for different team members. We are comfortable using a system of agreement for reviews and collaboration. However, we will be open to suggestions and improvements the consulting organization can bring.
28	Deliverable 6: What Data Governance materials currently exist for the SLDS? Do you expect the vendor to build upon these existing materials?	The SLDS team, in collaboration with its USDE SLDS Support Team, has developed a recommendation, in the form of a concept paper, outlining the proposed SLDS Data Governance Program and its structure. The SLDS team needs assistance taking this recommendation to the "next level" by convening key stakeholders to provide input on components that should be considered or added as part of a large state's SLDS data governance program and to participate in decision-making.
29	Is there a current data sharing agreement used between different state agencies? Could a copy be provided to the vendor?	We do not yet have an enterprise-level data sharing agreement with other state agencies. Development of that agreement is part of the 2023 SLDS grant opportunity.
30	Is there a current Data Governance Committee for New York State or in a specific agency?	There is an internal data governance board at the New York State Education Department (NYSED). Providing visibility into that board and its operations is a goal of the 2023 SLDS grant opportunity. Many state agencies have internal data governance boards that review requests from third parties regarding data.
31	Deliverable 8: Will the vendor need to set up an email account to communicate with participants for the convenings?	The vendor is free to do so, if they believe it will improve communication by the vendor as part of delivery. The vendor may have a nysed.gov email account assigned as part of streamlining communication.
32	Deliverable 11: Is the vendor expected to solicit feedback beyond the feedback received during the first Data Governance Convening?	The consulting organization will work closely with the SLDS team to make these decisions.

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33	Deliverable 11: If additional feedback will need to be collected, are there restrictions on what platforms or tools may be used? For example, for a web-based survey, is using Google Survey or Survey Monkey acceptable; for a feedback platform, is ThoughtExchange or Poll Everywhere acceptable?	The consulting organization will work closely with the SLDS team to make these decisions. We are open to all such tools noted in this question. Bidders are encouraged to include necessary tools/materials/recommendations as part of their response.
34	Deliverable 16: Will the vendor be responsible for hosting the Data Governance Playbook on a publicly accessible website?	No. That is the SLDS team's responsibility.
35	Deliverable 16: What format will the Data Governance Playbook take (PDF, or something more dynamic)?	PDF and an overview/brief in PPT.
36	Deliverable 16: Will all deliverables need to be designed to be accessible to those with disabilities (Section 508 compliance with the Americans with Disabilities Act)?	Yes. NYSED's Communications Office has expertise in making materials for the public accessible and can assist with review and recommendations for updates.