



Request for Proposal (RFP)  
Business Intelligence Program Phase II

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## 1. Organizational Information

The Society for Neuroscience (SfN) is the world's largest organization of scientists and physicians devoted to advancing the understanding of the brain and nervous system. A membership society founded in 1969, SfN has grown to serve more than 38,000 plus members in 87 countries. SfN promotes scientific exchange through its annual meeting, which attracts more than 30,000 attendees from around the globe, and *The Journal of Neuroscience*, the field's most-cited peer-reviewed journal. SfN also supports the neuroscience community through professional development programming and is dedicated to sharing the excitement and progress of scientific discovery through public information and outreach. SfN advocates strongly for policies that advance science and improve health, such as robust federal research investments and the responsible use of animals in research.

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## 2. Purpose of Request for Proposal

SfN embarked on a BI initiative in 2012, and after three years of implementation, now has a data warehouse along with reporting and dashboard tools, a predictive analytics tool and a data governance tool. These tools have been a powerful foundation for data analysis and business insights throughout the organization, and SfN is prepared to make further investment in the platform and staff resources supporting it.

Before such investment, SfN contracted a third party to conduct an assessment / audit to evaluate the current state and identify a potential future state. Some key goals of the audit were to assess the efficiency of the current BI ecosystem and tools supporting it, understand what is needed for staff to become self-reliant in managing the platform long-term, and ensure that the platform continues to meet SfN's business needs now and in the future state of self-service analytics. A final whitepaper was delivered to SfN with various recommendations on how to improve the BI environment.

The six areas identified for improvement were:

- BI Architecture
  - This includes making the data warehouse more agile as to easily integrate data sources moving forward and more nimbly change as data structures are changed; moving to a hosted service that is easier to access and maintain.
- Data Collection Efforts
  - Continue to expand data integrations into the data warehouse in order to make the data available for analysis more robust
- Dashboards and Visualization & Analysis Tools
  - Continue to design dashboards that will be useful to the organization as whole while keeping in mind that the dashboards may change over time
- Data Governance Policy
  - Continue to update the data governance policy with documentation, Standard Operating Procedures (SOPs), a data dictionary and leverage CA Erwin as a data governance tool in order to help SfN maintain and use its data assets most effectively.

- Training
  - Continue to train SfN technical staff and end users in various capacities in order to increase BI adoption and be able to maintain the BI environment in house.

### 3. Key Dates

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Activity	Date
RFP Release Date	March 27, 2017
Vendor to Submit Questions / RFP Clarifications	March 27, 2017 to April 14, 2017
RFP Response Deadline	April 24, 2017

### 4. Scope of Work (SOW)

The following are recommendations SfN wants to execute in the next three years.

- **Make Architecture More Agile and Accessible**
  - Create a data layer that has a dimensional model that is developed in collaboration with business stakeholders and aligned with business needs. This data layer should be designed (for example with Modelstorming) to be compatible with any data visualization and analysis tools and with the flexibility to change and adapt to new data sources in the future. The data layer should also be optimized to be able to process mass amounts of data.
- **Improve Performance and Reliability of Hosting**
  - Assist with the assessment of a hosted, cloud service to improve data warehouse performance and make a recommendation on which service is best for SfN
  - Transfer the data warehouse to the new service and set up SfN with proper access
- **Expand Data Collection Efforts**
  - Vendor will evaluate potential external data sources for business value, cost, completeness, and level of complexity and effort for integration with the data warehouse.
  - Based on the vendor’s assessment, possibly integrate the SfN data sources below into the existing data warehouse in the suggested Phases (Phase I, II & III) using Extract, Transform and Load (ETL) to update the data warehouse nightly or as necessary.

Phase	Summary	Data Source(s)
<b>Foundational Architecting</b>	Creates the core architecture. Focus on evaluating existing architecture and integrations.	CDS, Personify, Hubspot, ExpoCAD, OASIS, NSP, eJP
<b>Phase I</b>	Priority business areas and high-value data sources that span multiple business areas.	Dynamics GP, Prophix, Sitecore/Google Analytics, Ringold
<b>Phase II</b>	Builds on Phase I and the existing data warehouse. Low to medium complexity.	Verian, CMS, Knowlegis, Salsa, Discourse, InxPO
<b>Phase III</b>	This phase includes data sources that provide more narrowly targeted analytics and/or complex integrations.	Cordial, Muck Rack, Sprout Social, Trendkite, Boxwood, Facebook Insights, SurveyMonkey

- In addition, integrate third party data sources: ORCiD Data, Ringgold Institution Data, Census Data, and Hoovers data (can be in parallel to any of the phases)

- **Self-Service Analytics/Dashboard and Visualization Design**
  - Lead process in creating a dashboard/ visualization strategy at SfN
  - Assess data and SfN needs to determine what visualizations that do not currently exist would be of most value to build.
  - Document requirements for and develop dashboards and visualizations that are easy to access, learn, use and answer the majority of our basic questions using Tableau, Power BI or a hybrid approach.
  - Develop or modify universes (cubes) as needed for the dashboards.
  
- **Update Data Governance Policy**
  - Update SfN’s data governance policy and data warehouse documentation as the project progresses. This will include updates to the following as needed: :
    - Specifications of the data warehouse structure
    - Specifications of universe (cube) structures
    - Specifications on data integrations
    - Specifications on dashboards and visualizations created
    - Standard operating procedures
    - Updates to the data dictionary
  - Leverage CA Erwin as part of the governance plan
  
- **Training**
  - Help develop a training strategy for SfN that can be sustained post-project and will include the following:
    - Provide SfN technical team with training on integrations and data warehouse maintenance
    - Provide tool training for SfN maintenance and creation of additional dashboards and visualizations
  
    - Provide user training on dashboards and visualizations developed for self-service analytics
    - Provide ready-to-use training material and train-the-trainer materials for SfN continue staff training of the dashboard and visualizations produced
    - Provide standard operating procedures as needed

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## 5. Supplier Questions

Questions may be e-mailed to [ptroxell@sfn.org](mailto:ptroxell@sfn.org). Written questions should be directly tied to the RFP by the writer. Questions should be asked in constructive order, from beginning to end, following the organization of the RFP. Each question should begin by referencing the RFP page and section number to which it relates.

NOTE: Registered bidders are NOT to contact any SfN associate directly without first clearing it with the Procurement Manager. You can contact the Procurement Manager at 202-962-4028. Anyone caught violating this rule risks being eliminated from the RFP process.

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## 6. Proposal Preparation and Submission Instructions

Interested parties are to provide the Society with a thorough proposal using the following guidelines:

### General

Proposal should be as brief as possible. Proposal should be straightforward and concise and provide “layman” explanations of technical terms that are used. Emphasis should be concentrated on conforming

to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description of the offer. Proposals, which appear unrealistic in the terms of technical commitments, lack of technical competence, or are indicative of failure to comprehend the complexity and risk of this contract, may be rejected.

The bidder must follow instructions in this RFP when preparing and submitting its proposal. The bidder is advised to read thoroughly and to follow all instructions. The information required to be submitted in response to this RFP has been determined to be essential in the bid evaluation and contract award process.

Each bidder is given wide latitude in the degree of detail it elects to offer of the extent to which plans, designs systems, processes and procedures are relevant. Each bidder is cautioned, however, that insufficient detail may result in a determination that the bid proposal is materially non-responsive.

- **Preparation of Proposal**

Each proposal shall be prepared simply and economically, avoiding the use of elaborate promotional material beyond those sufficient to provide a complete, accurate and reliable presentation.

- **Number of Proposal Copies**

Please submit one electronic copy of your proposal to: [ptroxell@sfn.org](mailto:ptroxell@sfn.org)

In your proposal, please include the following information:

1) **Company Overview and Qualifications**

- Company name, address, website
- Company history and experience (years in business)
- Key Contact name and title including business phone, mobile phone and email address
- Company size (by number of employees)
  - Number of Employees Assigned to SfN's Account
- Biographies of key company personnel SfN would be working with

Responses must include the following:

**Project Work Plan** – should at a minimum:

- a) Demonstrate the Vendor's understanding of the services requested in the Statement of Work and any problems anticipated in accomplishing the work.
- b) Show the overall design idea/plan for achieving the results defined in the Statement of Work with an estimated timeline.
- c) Explain how the Vendor will meet the requirements established in the Statement of Work and/or necessary to implement their design idea/plan.
- d) Include a description of software/hardware configuration.
- e) Detail a Project Approach, explaining how the Vendor will approach their participation in the project, including:
  - i) Organization and staffing
  - ii) Contract/change management procedures
  - iii) Project management (e.g. quality management, risk assessment/management, etc.)

- iv) Documentation of progress such as status reports

### **Project Budget**

Provide high-level estimates or cost ranges for the upgrade project.

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## **7. RFP GENERAL INFORMATION**

- Neither SfN nor its representatives shall be liable for any expenses a bidder incurs in connection with preparation of a response to this RFP. Applicants should prepare their quotes simply and economically, providing a straightforward and concise description of the bidder's ability to meet the requirements of this RFP.
- The issuance of this RFP does not commit SfN to award a contract, to pay any costs incurred in the preparation of a quote in response to this request or to actually procure the requested services.
- Request for Additional Information: Prior to the final selection, vendors may be required to submit additional information that SfN deems necessary to further evaluate the vendor's qualifications. As part of the evaluation process, vendors shall furnish such additional information as SfN may reasonably require.
- SfN will not be liable for any costs incurred by the vendor in connection with interviews (i.e., travel, accommodations, etc.) conducted as part of the evaluation or negotiation process.
- Gratuity Prohibition: Vendors shall not offer any gratuities, favors, or anything of monetary value to any associate at SfN for the purpose of influencing consideration of this quote. If an SfN associate solicits a gratuity, the vendor is obligated to inform SfN's Deputy Executive Director (Operations).
- Right of Negotiation: SfN reserves the right to negotiate with the selected vendor the exact terms and conditions for a contract.
- Legal Compliance: In connection with the furnishing of supplies of performance of work under the contract, the contractor agrees to comply with the Fair Labor Standard Act, Equal Opportunity Employment Act, and all other applicable Federal and State laws, regulations and executive orders to the extent that the same may be applicable.
- Disqualification: No award will be made to any bidder, person or party, parent or subsidiary that is de-barred from providing services to the federal or state government, or with which SfN has an outstanding claim against or a financial dispute.
- Licenses, Permits & Taxes: The price or prices for the work shall include full compensation for all taxes, permits, etc. that the vendor is or may be required to pay. SfN is a tax exempt entity.
- Minority/Women Business Enterprise (MWBE) Policy: It is the policy of SfN to provide minority and women owned business enterprises with equal opportunity for participating in the selling of goods and services to SfN. In cases where a vendor plans to sub-contract a portion of the work, it is required to make "A Good Faith Effort" to engage qualified MWBEs for such work. Vendors shall keep records of such efforts, when applicable, that are adequate to permit a determination of compliance with this requirement. If subcontracting is involved in the quote, a Proposed Schedule of Minority/Women Business Enterprise Participation shall also be submitted.

- Revisions to this RFP: In the event it becomes necessary to clarify or revise this RFP, such clarification or revision will be by addendum. Any RFP addendum will be distributed to all registered bidders via the e-mail provided.