

Attachment G – Scope Clarification

This Attachment G is issued by the MSBA to provide additional clarification to the scope of services described in the RFR. The following Frequently Asked Questions was prepared by the MSBA to address common themes and potential areas of confusion identified through vendor inquiries.

1) Does the scope of this project include implementation or system development activities?

The MSBA is not seeking implementation or software development as part of this engagement.

2) What should the consultant deliver at the conclusion of this phase?

The outcome of this phase is a comprehensive, fully integrated workflow plan and Data Master Plan to guide a future data input and output system implementation.

The data master plan will be a strategic, comprehensive document that outlines how the MSBA will create, manage, and utilize its capital planning data to ensure accuracy, consistency, and accessibility across the enterprise, ultimately enabling better decision-making and efficient operations.

Key Aspects of a Data Master Plan:

- **Data Governance:** Establish rules, policies, and processes for managing data quality and compliance.
- **Single Source of Truth:** Recommend a format for a consistent, reliable, and accurate master record for each core business entity.
- **Data Quality:** Identify data that should be de-duplicated, reconciled, and enriched to ensure it is accurate and up-to-date.
- **Business Alignment:** Define how the data strategy supports specific business goals and initiatives

Deliverables will include detailed workflow maps, defined data fields aligned with each stage of MSBA's business process, as well as a governance framework. The success of this phase will be measured by the completeness and accuracy of the workflows and data definitions, alignment with MSBA's operational needs, and the readiness of the plan to serve as a foundation for implementation.

3) How will the MSBA measure project success?

The success of this phase will be measured by the completeness and accuracy of the workflows and data definitions, alignment with MSBA's operational needs, and the readiness of the Data Master Plan to serve as a foundation for implementation.

The most important outcome of this phase is a comprehensive, validated plan that can guide the structure of a user interface for data collection and retrieval that captures and produces all necessary data and tracks the entirety of the MSBA process from beginning to end for each individual user role by module or step.

4) Will the selected consultant be required to be on-site? How often will the consultant be expected to be on-site?

While the MSBA does not have any specific on-site requirements for consultant activity, and understands that work can be completed off-site, it is possible that some meetings or presentations may require face-to-face interaction and consultants should consider the possibility of some in-person meeting time, to include the kick-off meeting. For all other potential on-site work, we are open to discussion with prospective consultants with regards to the model of on-site and off-site work that may result in the best process.

5) What is the estimated scope of the current internal system, external system artifacts, and reports to be reviewed?

The following are meant as estimates only and are not a final count of the number of artifacts to review, but is a general guideline to consider the scope of the review. The majority of the data and documentation formats will be readily available in some format. However, we do look to the consultant to help us understand if there is additional data that we should be collecting.

Within the MSBA System there are approximately:

- 180 views within the user interface.
- 65 reports that are pulled directly from the system.
- 16 Data View databases for use in Tableau.

External reports and applications include approximately:

- 250-300 artifacts and files maintained outside the system.
- 20-30 Tableau dashboards.

Documentation will be provided in standard, machine-readable formats.

6) What will be the MSBA staff involvement in the project?

The MSBA Data Team will work to liaise between MSBA and external stakeholders and the consultant team. Three members of the Data Team will be involved in the project on a day-to-day basis, to ensure that the consultant receives all necessary data, documents, and information, provide access to test environments, and set up meetings with stakeholders. The IT Team will also be involved in providing access to data and test environments. Both the Data and IT Teams will work with the consultant throughout the process. MSBA leadership will be available, as will members of specific teams, to provide insight into their work and their data needs, as well as to

provide input during the process as needed. While there are times during the year when certain teams may have limited availability due to the natural flow of their work responsibilities, the Data Team will ensure that the project schedule is not impeded.

7) Are there any restrictions or requirements with regards to what should go into the Data Master Plan and roadmap?

Part of the project goal is to explore options. Therefore, alternatives should be considered and may be included in recommendations in coordination with MSBA staff. While there may be restrictions on future implementation, we would like to consider possibilities in consultation with the selected consultant.

8) Has any other firm been involved in this project in any earlier phase?

No.

9) What stakeholder groups are most heavily involved in the data collection process currently? What will be their involvement level within the project?

Stakeholder groups include the 4 Capital Planning Teams (Data, Program, Project, and Construction Administration), the Legal Department, the IT Department, potentially the Finance Department, Executive Team, Districts, Owner's Project Managers, and Designers. The Capital Planning Team will be most engaged in the data collection process with IT support. Nearly all data entry is currently via MSBA Staff with a few minor external inputs.

We are only looking for a small sample of input of relevant external stakeholders; not a full-scale survey.

Within the project, staff will make themselves available for discovery. The Data Team will work with the consultant to contact external stakeholders who may be future users of the system.

10) What are the biggest risks to the project?

While the consultant may provide further insight, the MSBA perceives the biggest risks to project success as follows:

- 1) Workflow Alignment: Ensuring that the system design fully aligns with MSBA's established workflows is critical. Any mismatch between the data collection and analysis tools and the actual business processes could lead to inefficiencies, errors, or limited adoption.
- 2) Data Completeness and Integration: Missing or incomplete data represents a significant risk. The success of the project depends on capturing and integrating all relevant data

elements accurately across programs and systems to ensure that reporting and analysis are reliable.

- 3) User Adoption and Buy-In: Securing buy-in from internal and external users is essential. If the tools or workflows are not intuitive, or if users do not understand their purpose and benefits, adoption may lag.

11) Are there any existing data governance protocols?

The MSBA Capital Planning Department has some guidance on how to navigate the current system and for SOP on individual processes within the workflow. The MSBA does not currently have a formal data governance policy or committee.