Philadelphia Housing Development Corporation (PHDC)

Home Improvement & Preservation Portal - Data Migration

Data Migration-RFP Vendor Q&A

1. If the scope of the project changes, can the contract be renegotiated?

   Yes, should the scope of the project change, the contract can be renegotiated.

2. Why do we have to identify hourly rates if it's fixed pricing?

   PHDC would like to have a clear understanding of the number of staff the prospective vendor proposes to utilize, the extent of their involvement, and their associated cost.

3. In what format do you want the deliverables (i.e. data)?

   At this time, the deliverables should be made available in comma-separated-value (CSV) format. However, we anticipate that this answer may be fine-tuned in consultation with the implementation vendor.

4. Does paper need to be carried forward (i.e. who will be responsible for transcribing what is on paper into the new system)? What about digitizing hardcopy (i.e. attachment)?

   Nothing will be transcribed from paper nor will any existing hardcopy need to be digitized.

5. Is this a subset of the March RFP?

   This project will operate in conjunction with the RFP released by PHDC in March 2018. This project will cover the migration of the data that will be imported into the new solution that will be developed under the separate March 2018 RFP.

6. Do files need to be extracted from a document management system?

   No, files will not need to be extracted from a document management system.

7. How much work will need to be done onsite?

   PHDC has no required minimum for work to be performed on-site. However, there is an expectation that there will be face-to-face meetings conducted at least periodically.

8. Are open-source solutions OK?

   PHDC has no preference as to what tool(s) a prospective contractor utilizes to cleanse and organize the data as long as the deliverable is in the required format.

9. Do you use QuickBase or SalesForce? Would they be OK for this project?

This project pertains to the extraction, cleansing, and organization of data only. It does not include the development of a new system to receive this data.

10. Is the scope to create a data warehouse?

The creation of a data warehouse is not in scope for this project.

11. Is the current database live?

The current data sources are all live and in production.

12. When will the last data be keyed into the legacy systems?

The date at which the last data will be keyed into the legacy systems has yet to be determined. This decision will be reached in consultation with PHDC, the selected contractor, and the contractor developing the new system.

13. When the new program is ready, will there be a snapshot taken and then a transfer as it relates to updating data that is older than the 10-year and 5-year cutoffs?

PHDC expects that there will be multiple snapshots taken of the existing data during the course of the project.

14. Is using offshore resources allowed?

Offshore resources are allowed as long they do not interfere with the project timeline or the interactions between PHDC and the implementation vendor.

15. Is cloud allowed?

Data can be temporarily stored in the cloud during the course of this project as long as it is secure.

16. Will PHDC obtain archived paper copies for the vendor?

Yes, PHDC will make arrangement to obtained archived paper copies as required to resolve issues with particular cases.

17. Is there currently a deadline for completing this project?

The project timeline is still under development with the implementation vendor.

18. Will the data migration vendor be in contact with the implementation vendor?

Yes, PHDC anticipates that the data migration vendor will be working closely with the implementation vendor.

19. Is this pre-proposal meeting mandatory?

No, the pre-proposal meeting is voluntary.

20. My company is both minority and female owned. Do both count or do we need to bring someone else in?

    Minority and female-owned entities are not required to bring in outside talent to participate in this RFP.

21. Are there any addenda or documents that were formalized and released as a result of the Pre-Proposal Meeting on December 5th?

    This document will be the only one of its kind released as a result of the pre-proposal meeting.

22. Can the PHDC provide further details as to the sources of data to be handled under this project? In particular, we would like to understand the current format and layout, how the data is stored, any size and/or volume metrics, confirmation that all data to be migrated is electronically stored, etc.

    Not having any programming expertise, PHDC is limited in any detail it can provide regarding current data format, layouts, etc. However, the chosen vendor will be able to interact with our current application vendors to identify this information.

23. Can PHDC offer any further detail as to the scope of "data cleansing" that you expect? For example, there is simple data cleansing whereby exact duplicates are de-duplicated or where fields are checked against a pre-determined list of valid values and, there are more complex data cleansing where vendors are expected to de-duplicate "John Smith" from "Jon Smith" from "J Smith" or generate new data fields that are not otherwise already in the data such as GPS coordinates, etc. What is expected by PHDC under the title "data cleansing"?

    PHDC would require data cleansing where duplicates are de-duplicated; that there is consistency within field values across records (within the same data source and across data sources), etc. We are not looking to add new fields at this time.

24. It is also our understanding that the loading of these CSV files into the new system is outside the scope of this project and will be handled by another vendor or the PHDC themselves. Is that a correct assumption? Can PHDC confirm that the text in section 2.1 and 2.2.2 about the "importation of data into the replacement system(s)" is deleted from the scope?

    PHDC expects the selected vendor to work closely with the system implementation vendor to ensure that the exported and cleaned data is imported into the new system successfully.

25. The Warranty outlined in section 2.2.2 is not industry standard for a professional services scope of work. Services warranties typical say that (a) all Work carried out shall be performed in a competent, professional and workmanlike manner, and shall be of industry standard or better quality; (b) all Work carried out and all deliverables shall comply with all Applicable Law; and (c) all Work carried out and all deliverables produced will be in conformity with the specifications and requirements that are documented and mutually agreed to during the engagement. Once a final deliverable is accepted by a client as meeting the requirements, there is typically no further warranty period. What is the purpose of requesting a one-year warranty on deliverables that are accepted by PHDC as meeting the requirements? Under what cases would PHDC sign off on deliverables and then want to come back and say they didn't meet specifications?

    PHDC would need to negotiate with the selected vendor as to what steps are mutually agreed upon for use when validating that the deliverables are both complete and accurate. Under such circumstances, PHDC would be willing to reconsider the length of the warranty period specified in the RFP.

26. In which Volume (Volume 1 or 2) and which Section of our Proposal do we include the items requested in section 3.2 (Implementation Plan, Statement of Work, Project Schedule and Milestone Payment Schedule)?

    The implementation plan, statement of work, project schedule, and milestone payment schedule should be included in Volume 2 of the vendor proposal.

27. Can PHDC confirm which of the Appendices and Forms that are included in the RFP must be completed and submitted in our Proposal? In which Volume and Section of the Proposal should each form be submitted?

    PHDC is not able to confirm what forms under the appendices must be completed as that would vary from vendor to vendor depending upon their circumstances. The vendor should include any/all forms that they are required to complete for this RFP under Volume 1, Section 2.

28. Within AS400, there are currently seven databases.
    a. Is there one library? No, there is no one library.
    b. Please list the databases. The list of databases will be made available to the selected vendor.
    c. Is the source file for the files available? Should you be referring to source code, the source code for the HIP module is available.
    d. Are there file analysis tools available? PHDC does not currently have file analysis tools available. PHDC expects the selected vendor to have access to such tools.

29. Does the data migration solution need to factor data to be synced up to the data warehouse once the new portal in in place?

    No data warehouse is required under this RFP.

30. Does the solution have to include data sync between current legacy and the data warehouse (archive) solution until the HIP portal is in place?

    No data warehouse is required under this RFP.

31. What type of security requirements does PHDC have in source systems? Are there regulatory requirements to meet in terms of security?

    The security in place for the source systems vary from system to system. There are no regulatory requirements to meet in terms of security for the cleansing and migration of data.

32. Will ETL tool or Data Warehouse have direct access to source system databases or any of the data sources require "manual intervention" to create the extracts/exports and to copy data?

    No data warehouse is required under this RFP.

33. Is there a need to mask or de-identify data within the data warehouse?

    No data warehouse is required under this RFP.

34. Do PHDC have schema requirements for the Portal ready?

    PHDC does not currently have schema requirements for the system solution available.

35. What is the perception of the quality of the data in the source systems, good, fair, poor, bad?

    PHDC believes that the quality of the data in the source systems is generally fair.

36. Are there existing common attributes which will help in integrating data from source systems?

    There are commonalities across the source systems when it comes to customer names, case numbers, addresses, etc.

37. What are some examples of data quality challenges that PHDC encounters from each of the source systems listed in the RFP.

    PHDC believes that the data quality challenges will come from the selection of the desired/correct fields from each data source for the creation of the new data source for the new system solution. Many of these systems contain similar information. There is no one system-of-record for everything.

38. Do 'As is' systems assist user data entries by providing pre-defined list of values or by attribution/hierarchies. Or Users must manually enter the data most of the time?

    The AS/400, CATS, and the HI Portal provide predefined lists of values for certain fields.

39. Are there best practices defined for free text data entries in source systems?

   PHDC is not in a position to know if there are best practices defined for free text data entries in the source systems. The chosen vendor would be able to ascertain this information when working with the current application vendors where applicable.

40. Is there a requirement to develop reconciliation reports post migration?

   The development of reconciliation reports is required as part of the quality assurance portion of this project.

41. How are 'As Is' applications integrated (if at all)?

   The current applications are not integrated with each other. They operate independently of each other. They do not share data.

42. Is a packaged or hosted solution acceptable?

   This RFP covers only the data migration portion of the system replacement. There is no packaged or hosted solution required of the vendor for this RFP.