



REQUEST FOR PROPOSAL

For: Power BI Architecture and Delivery Advisory Services

www.rfsuny.org



Table of Contents

Section	Contents	Page
1	General Standard Information and Instructions	1
	Summary.....	1
	Proposal Submission	1
	Response to Inquiries	2
	The Research Foundation of SUNY Reserved Rights	2
	Compliance with Laws and Regulations.....	3
	Liability and Indemnification	3
	Additional Terms and/or Conditions	3
	Bidder's Certification	5
2	Overview	6
3	Proposal Submission Requirements.....	7
4	Business Requirements (Scope of Work Section)	12
5	Evaluation and Selection Criteria.....	14

You are invited to submit a bid proposal to The Research Foundation for SUNY. For more information on the Research Foundation visit our website @ www.rfsuny.org

Section 1: General Standard Information and Instructions

Summary

Due Dates (and Times, if applicable):

Questions: 08/11/26

Proposals: 08/27/26

Decision Date: 09/11/26

Location of Service:

35 State Street

Albany, NY 12207

Inquiries to:

Katie Keough

Director of Data Strategy

35 State Street Albany, NY 12207

518-434-7177

Katie.keough@rfsuny.org

Proposal Submission

When submitting a proposal, you must:

1. Prepare a clearly readable document that provides information in the order requested and attach all required information.
2. Indicate any deviations from the specifications.
3. Sign the proposal. Your signature indicates full knowledge and acceptance of this Request for Proposal ("RFP").
4. Submit five (5) complete proposals, one of which must have original signatures. Proposals should be sealed, clearly marked "sealed proposal," and addressed to:

Kimberly Fertornado

ITS Administrative Assistant

35 State Street Albany, NY 12207

5. Submit the proposal so that it is received by the due date (and time, if applicable). We will not accept proposals submitted electronically.

Response to Inquiries

Any inquiries about the requirements of this Request for Proposal or any apparent omission or discrepancy should be presented in writing to the Research Foundation (RF) representative listed below. All formal inquiries must be submitted no later than 08/11/2026. Failure to submit inquiries by this deadline may result in the inquiry not being answered. The Research Foundation representative will then answer each question and disseminate the answers in writing to each firm or individual that received an RFP. If necessary, the Research Foundation representative will issue a written amendment to the Request for Proposal. Oral statements or instructions do not constitute an amendment to this Request for Proposal.

Katie Keough
Director of Data Strategy
35 State Street Albany, NY 12207
518.434.7177
Katie.Keough@rfsuny.org

The Research Foundation reserves the right to

1. Reject any and all proposals received in response to this RFP.
2. Request references and financial statements for the most recently completed fiscal year
3. Contact any or all references.
4. Waive requirements or amend this RFP on notification to all bidders. Mandatory requirements may be eliminated if unmet by all bidders.
5. Adjust or correct cost or cost figures with the concurrence of the bidders if mathematical or typographical errors exist.
6. Negotiate with bidders responding to this RFP within the requirements necessary to serve the best interests of the Research Foundation.
7. Begin contract negotiations with another bidder in order to serve the best interests of the Research Foundation (RF), should the RF be unsuccessful in negotiating a contract with the successful bidder within an acceptable time frame.
8. Reject any or all portions of any offer, to negotiate terms and conditions consistent with the solicitation, and to make an award for any or all remaining portions.
9. Request clarifications from bidders for purposes of assuring a full understanding of responsiveness, and further to permit revisions from all bidders being considered for contract award, prior to award.
10. Waive minor irregularities.

Compliance with Laws and Regulations: Non-Discrimination, Equal Opportunity and Affirmative Action Obligations

The awarding of this business and continuation of services are subject to the requirements of Executive Order 11246 and 11375 and the rules and regulations of the Secretary of Labor (41 CFR Chapter 60) in promoting Equal Employment Opportunities.

The successful bidder must certify that it does not and will not discriminate or unduly favor any employees or agents on the basis of race, gender, national origin, religion or disability. As part of this contract, bidder must agree to comply with all applicable provisions of Section 503, Title V of the Vietnam Era Veterans' Readjustment Assistance Act of 1972, as the same may be from time to time amended, together with all applicable regulations thereunder and all applicable provisions of Sections 503 and 504 of the Rehabilitation Act of 1973 (Public Law 93-516) as the same may be from time to time amended, together with all applicable regulations thereunder.

Liability and Indemnification

The successful bidder will be responsible for the work, direction and compensation of its employees, consultants, agents and contractors. Nothing in the resulting agreement or the performance thereof by the successful bidder will impose any liability or duty whatsoever on the Research Foundation including, but not limited to, any liability for taxes, compensation, commissions, unemployment insurance, Workers' Compensation, disability benefits, Social Security, or other employee benefits for any person or entity. The successful bidder shall hold harmless and indemnify the Research Foundation, their officers and employees from and against any injury, damage, loss of liability to persons or property resulting from or arising out of (a) the agreement, and (b) the acts, omissions, liabilities, or obligations of the successful bidder, any affiliate, or any person or entity engaged by the successful bidder as an expert, consultant, independent contractor, subcontractor, employee or agent.

Additional Terms and/or Conditions

1. The following items will be incorporated into, and made part of, the formal agreement: (1) the Research Foundation's RFP; (2) the successful bidder's proposal.
2. In the event of any inconsistency in or conflict among the document elements of the agreement described above, such inconsistency or conflict shall be resolved by giving precedence to the document elements in the following order: (1) the Agreement (2) this RFP (3) the successful bidder's proposal.
3. Any terms that are attached or referenced with a submission shall not be considered part of the bid or proposal, but shall be deemed included for informational purposes only.
4. The resulting agreement shall be binding upon its execution by both parties.
5. The agreement may be revised at any time upon mutual consent of the parties in writing. Such written consent will not be effective until signed by both parties.
6. The relationship of the successful bidder to the Research Foundation shall be that of independent contractor.

7. Proposed prices should reflect all discounts including educational discounts.
8. The submission of a proposal constitutes a binding offer to perform and provide said services. Such binding offer shall be firm and not revocable for a period of 180 days after the deadline for proposal submission and will continue thereafter until the successful bidder notifies the Research Foundation otherwise, in writing. Such deadline may be further extended by mutual agreement.
9. In the event successful bidder uses partners, subcontracts or subcontractors, the successful bidder will remain responsible for compliance with all specifications and performance of all obligations under the contract resulting from this RFP.
10. The Research Foundation will not be liable for any cost associated with the preparation, transmittal, or presentation of any proposals or materials submitted in response to this RFP.
11. All bids or proposals submitted in response to the solicitation become and remain the property of the Research Foundation and should any doubt or difference of opinion arise between the Research Foundation and the bidder as to the items to be furnished or the interpretation of the provisions in the solicitation, the decision of the Research Foundation shall be final and binding upon all parties.
12. This RFP and the resulting contract shall be governed by the Laws of the State of New York.
13. Public announcements or news releases regarding this RFP or any subsequent award of a contract must not be made by any bidder without the prior written approval of the Research Foundation.
14. The successful bidder is responsible for compliance with all applicable rules and regulations pertaining to cities, towns, counties and State where the services are provided, and all other laws applicable to the performance of the resulting contract. The successful bidder shall provide all necessary safeguards for safety and protection as set forth by the United States Department of Labor, Occupational Safety and Health Administration.

Bidders Certification

Bidders must submit the following:

1. This completed certification.
2. Information as requested in Sections 2 through 6.

If you are not submitting a bid proposal, The Research Foundation requests the following:

1. Respond "No Bid will be submitted" and state your reason(s).
2. Return only this page to the Issuing Office address on Page 1.

Bidders please respond to the following inquiries and/or certifications:

1. Is the price quoted the same as or lower than that quoted other corporations, institutions or governmental agencies for similar service and/or like equipment or supplies?
Yes: _____
No: _____
If no, explain: _____
2. Does your firm agree that all presentations and materials will be free from racial, religious, or sexual bias?
Yes: _____
No: _____
3. Are you or any officer of your organization or any part owning or controlling more than 10 percent of your stock if you are a corporation or any member if you are a firm or association, an officer or employee of the Research Foundation of SUNY or of a public benefit corporation of the State of New York?
Yes: _____
No: _____
4. Within the past five years has your firm, any affiliate, any predecessor company or entity, owner, director, officer, partner or proprietor been the subject of a government suspension or debarment?
Yes: _____
No: _____
5. Name of Firm:
Address:
City/State/Zip:
Telephone Number (area code/number):
Fax Number (area code/number):
Employer's Federal ID Number:
E-Mail Address:
Bidder's Name/Title:
Bidder's Signature/Date: _____

Section 2: Overview

Purpose

The Research Foundation for SUNY (RF SUNY) is establishing a governed Power BI dashboard program to support executive decision-making, strengthen metric consistency across the SUNY research enterprise, and prepare for enterprise business intelligence scale-up. FY26 work has focused on KPI definition, source mapping, wireframes, and Excel-based validation of business rules. FY27 build is now planned and requires external coaching to accelerate semantic model development, enforce DAX standards, ensure refresh reliability, and build internal Power BI capability.

This Scope of Work (SOW) provides an outside consultant or consulting firm to provide architecture and delivery coaching across the FY27 build cycle. The engagement is structured as a coaching engagement, not a turnkey development contract. RF SUNY is in the early stages of enterprise Power BI adoption and expects to build internal capability throughout the engagement. As a result, the consultant shall provide a collaborative, hands-on coaching approach that includes paired development, architectural guidance, troubleshooting support, design reviews, and practical knowledge transfer. RF SUNY expects to learn and mature its Power BI practices throughout the engagement while delivering production-ready dashboard products. RF staff and the consultant will pair on deliverables, with the consultant providing patterns, standards, code review, and acceleration on complex measures.

Background

The Power BI POC was approved at the close of FY26 and authorizes FY27 build of the following dashboard products:

- Wave 1 – Proposal-to-Award Pipeline Transparency
- Wave 2 — Campus Assessment Transparency

Internal RF SUNY capacity for this build is limited: a Data Strategy Director, Interns, and Subject Matter Experts.

Period of Performance

Date of contract execution (anticipated by or before 09/28/26) through June 30, 2027. Two optional extension periods may be exercised at RF SUNY sole discretion through June 30, 2028, contingent on (a) availability of funding, (b) acceptable performance under this engagement, and (c) continued business need. Respondents shall provide fully burdened hourly rates for each proposed labor category. RF SUNY anticipates approximately 350-500 consulting hours over the life of the engagement.

RF SUNY reserves the right to increase funding, extend the period of performance, or issue additional work authorizations based on project needs, funding availability, and satisfactory contractor performance. RF SUNY may elect to exercise additional support services for advanced Campus Assessment implementation, reconciliation validation, performance optimization, Microsoft Fabric migration planning, dashboard expansion, or FY28 analytics initiatives.

Section 3: Proposal Requirements

Deliverables and Milestones

Phase	Timeframe	Key Deliverables	% Spend
0. Procurement & Onboarding	Sept–Oct 2026	Engagement kickoff; onboarding completion; build roadmap confirmation; environment review; current-state architecture assessment; source inventory validation; initial Campus Assessment data and business-rule review.	~15%
1. Foundation	Nov–Dec 2026	Semantic model standards document; Power BI development standards and DAX style guide; workspace architecture; refresh architecture and monitoring runbook; Microsoft Fabric readiness assessment; DEV/TEST/PROD workspace blueprint; RLS pattern catalog; prioritized architecture roadmap.	~25%
2. Wave 1 Build & Wave 2 Discovery	Jan–April 2027	Proposal-to-Award dashboard architecture reviews; measure and semantic model coaching; reusable Power BI template (.pbit) starter kit; performance tuning; UAT support; production deployment support. Concurrently, Campus Assessment requirements validation, allocation methodology review, reconciliation framework design, KPI confirmation, architecture review, and risk assessment.	~30%
Milestone Review	April 2027	Wave 1 production acceptance; review of remaining consulting hours; Campus Assessment scope validation; data readiness assessment; project risk review; recommendation for final phase support and optional extension planning.	
3. Wave 2 Build Support & Closeout	Apr–Jun 2027	Campus Assessment technical coaching and calculation validation; reconciliation tie-out support; performance optimization; UAT support; production deployment and support runbook; knowledge transfer sessions; final documentation package; engagement closeout report.	~30%

Schedule assumptions are based on timely availability of RF personnel, business stewards, source data, technical environments, and governance approvals.

Deliverable acceptance: Each deliverable is accepted by the RF Director of Data Strategy upon written confirmation that the artifact meets the acceptance criteria defined in the engagement charter (issued within the first 30 days of the engagement). RF reserves the right to require revisions at no additional cost where deliverables do not meet acceptance criteria.

Consultant Qualifications

The consultant (or consulting firm) and the proposed lead architect must demonstrate:

- Minimum five (5) years of senior-level Power BI architecture experience including semantic model design and DAX development.
- Demonstrated experience implementing Power BI in higher education, research administration, healthcare, or similarly regulated environments.
- Microsoft Power BI Data Analyst (PL-300) or Fabric Analytics Engineer Associate (DP-600) certification, or equivalent demonstrated equivalent expertise.
- Experience with at least two of: Oracle EBS, federal grant data, sponsored research administration data, or campus financial data.
- Demonstrated history of successfully delivering coaching, mentoring, knowledge transfer, or capability-building engagements in conjunction with Power BI, Microsoft Fabric, analytics, or business intelligence implementations. Respondents shall provide at least two examples describing the client environment, coaching approach, knowledge transfer activities, and resulting outcomes.
- Documented portfolio of prior comparable engagements; references from at least three (3) prior clients available on request. References should include engagements involving coaching, mentoring, paired development, knowledge transfer, or client capability-building activities. RF SUNY reserves the right to inquire regarding the respondent's effectiveness in developing client self-sufficiency and long-term solution ownership.
- Experience designing Row-Level Security models in Entra ID / federated identity contexts.

RF SUNY Responsibilities

- Provide timely access to source systems, documentation, and Subject Matter Experts as scheduled.
- Designate Director of Data Strategy and Executive Office Manager as the consultant's primary points of contact.
- Provision Power BI Pro or Premium licensing as needed for the consultant during the engagement.
- Provide consultant with RF SUNY information security training, data handling policy, and acceptable use policy on engagement start.
- RF SUNY will designate required business stewards prior to commencement of dashboard certification activities. RF Leadership Team is the final escalation and approval authority for unresolved stewardship disputes.
- Conduct definition sign-off, business-rule decisions, and acceptance testing as scheduled.
- Maintain a current risks, assumptions, issues, and dependencies (RAID) log jointly with the consultant.

Consultant Responsibilities

- Deliver all services described in Section 3 and Section 4.

- Provide a named lead architect who serves as the primary point of contact and is on the engagement for its full duration; substitutions require RF written approval.
- Comply with RF SUNY information security, data handling, and acceptable use policies.
- Comply with PHI/PII, and export control restrictions as applicable to data accessed during the engagement (data classification will be provided at kickoff). The consultant will not access any data classified as restricted without explicit written authorization.
- Recognize that RF SUNY personnel are developing Power BI architecture, modeling, and governance capabilities during the engagement. The consultant shall provide practical mentoring and skills transfer appropriate to the experience level of RF staff and support the development of sustainable internal practices.
- Provide weekly written status reports including hours burned, work completed, work planned, risks, and decisions needed.
- Maintain code and artifact versioning in RF-designated repositories; no consultant-controlled storage of RF data or code.
- Complete all knowledge transfer activities sufficient for RF staff to maintain delivered artifacts.

Knowledge Transfer and Collaborative Delivery Approach

Respondents shall describe their approach to collaborative delivery, paired development, coaching, mentoring, architectural review, and knowledge transfer. Responses should include:

- Methods used to transfer technical knowledge
- Approach to building client self-sufficiency
- Examples of prior coaching-oriented engagements
- Sample deliverables used to support knowledge transfer
- Methods used to assess client capability growth throughout an engagement

Acceptance Criteria and Performance Metrics

Engagement-level success will be evaluated against the following measures:

- Wave 1 dashboards (Proposal-to-Award) published and accepted by 4/30/2027.
- Campus Assessment requirements, allocation methodology, reconciliation framework, and technical architecture approved by April 30, 2027.
- Wave 2 Campus Assessment published and accepted by 06/30/2027.
- Each delivered dashboard ties out to agreed control totals within documented tolerance bands.
- Semantic model standards, DAX style guide, and refresh runbook adopted by RF Power BI team as the operating standard.
- RF SUNY personnel demonstrate the ability to maintain, troubleshoot, and perform routine enhancements to delivered Power BI assets with limited consultant assistance by the conclusion of the engagement.
- All deliverables in Section 3 and Section 4 accepted by the RF Director of Data Strategy.

Reporting and Governance

Weekly status reports submitted to the Director of Data Strategy and weekly 30-60 minute working sessions with the RF Director of Data Strategy. Bi-weekly architecture review. Quarterly executive review with the RF COO, CIO and Director of Data Strategy. The consultant will participate in RF Data Strategy meetings as requested when matters relevant to the engagement are on the agenda. Any work outside the approved SOW shall require written approval by the Director of Data Strategy and may result in amendment of budget, hours, timeline, or deliverables. Risks impacting timeline, source data availability, SME participation, governance approvals, or system access shall be documented in the RAID log and escalated within 5 business days.

Appendix:

Deliverable	Minimum Acceptance Standard
Architecture Assessment	Current state maturity assessment, risks, technical debt observations, recommended remediation actions, and prioritized roadmap.
Power BI Development Standards and DAX Style Guide	Written standards with examples and style guide
RLS Catalog	At least 3 approved patterns
Refresh Architecture	Diagram + runbook
Microsoft Fabric Assessment	Written recommendation memo
Knowledge Transfer	Minimum 4 recorded training sessions to include architectural walkthrough, semantic model walkthrough; DAX standards review; production deployment and support runbook review. Recorded sessions supplemented by ongoing paired development, architecture walkthroughs, troubleshooting sessions, and hands-on coaching throughout the engagement.

Proposal Response Format

Respondents shall provide:

- 1. Executive Summary**
- 2. Project Understanding and Approach**
- 3. Power BI Architecture Experience**
- 4. Coaching and Knowledge Transfer Approach**
- 5. Similar Engagements**
- 6. Proposed Staff and Resumes**
- 7. References**
- 8. Cost Proposal**
- 9. Assumptions and Risks**

Section 4: Business Requirements (Scope Section)

Scope of Services

Core Services

- Semantic model architecture: design a reusable star-schema pattern for RF data domains (Awards, Proposals, Sponsors, Personnel, Campus Assessment), with documented conventions for fact/dimension granularity, slowly-changing dimensions, and role-playing dates. Consultant will advise on semantic models built from RF's consolidated reporting warehouse and Report Center environment rather than direct source-system integration.
- DAX standards and coaching: establish a DAX style guide; pair-program complex measures (time intelligence, allocation logic for campus assessment, proposal-to-award funnel calculations); review and refactor RF-developed measures.
- Refresh architecture: design refresh patterns for Report Center; validate gateway configuration and service-account model with RF ITS; build runbook for refresh monitoring and failure response.
- Performance engineering: profile and tune semantic models and reports; advise on capacity, premium-per-user vs. premium capacity trade-offs (informational only — capacity decisions are RF's).
- Deployment and lifecycle: establish DEV/TEST/PROD workspace strategy aligned with RF tenant; define deployment pipeline; document promotion and rollback procedures.
- Row-Level Security (RLS) and access design: design RLS patterns for campus-, function-, and role-based access; coordinate with RF ITS and Information Security on Entra ID group strategy.
- Wave 1 acceleration: pair with Director of Data Strategy's Proposal-to-Award builds; provide design review at wireframe-to-build transition, mid-build, and pre-UAT gates.
- Wave 2 (Campus Assessment) targeted support: provide deep technical support on the campus assessment allocation calculations, reconciliation tie-out, and tolerance-band visualization; this is the highest-risk deliverable and RF SUNY has established a target publication deadline of June 30, 2027 for Campus Assessment Transparency.
- Consultant shall provide an assessment of Microsoft Fabric applicability to RF SUNY's future-state analytics architecture, including benefits, limitations, licensing implications, and migration considerations. Deliverable: 5–10 page assessment outlining licensing, architecture implications, migration considerations, expected benefits, estimated effort, and recommendation.
- Knowledge transfer: deliver internal documentation, recorded walk-throughs, and pair-programming sessions sufficient for RF staff to operate, extend, and troubleshoot all delivered artifacts without consultant involvement post-engagement.
- RF SUNY staff shall remain the primary authors and owners of dashboards, semantic models, reports, and business logic developed during the engagement. Consultant services are intended to accelerate delivery while building sustainable internal capability.

Out of Scope

- Turnkey dashboard development without RF pair-programming or knowledge transfer.
- Data engineering build-out beyond review and pattern guidance (RF data engineering staff own SQL extracts and staging).
- Source system integration development (Report Center, Inteum, PACS modifications are owned by RF ITS and source-system custodians).
- Replacement of OBIEE reporting outside the named Wave 1 / Wave 2 products.
- Enterprise data quality program development beyond proof-of-concept tie-outs.
- Sponsor/Customer master data work (handled under separate project).
- Procurement of Power BI licenses, premium capacity, or third-party tools.
- End-user training delivery (RF will conduct end-user training; consultant supports train-the-trainer for RF Director of Data Strategy and ITS Data Analyst).

Section 5: Evaluation and Selection Criteria

The contract award will be based on “best value” that optimizes quality, fees, and efficiency among responsive and responsible bidders. Proposals deemed by the Research Foundation to satisfy the requirements set forth in this RFP will be evaluated for the awarding of a contract.

Only those proposals received by the stated deadline will be considered. All proposals submitted by the deadline will be reviewed and evaluated based on the information provided in the submitted proposal. In addition, consideration will be given to cost and performance projections. Furthermore, the following criteria will be given considerable weight in the proposal selection process:

- Bidder's performance history and alleged ability to deliver the proposed services on time.
- Bidder's ability to provide and deliver qualified personnel having the knowledge and skills required to execute proposed services effectively and efficiently.
- Demonstrated ability to successfully deliver collaborative coaching and capability-building engagements resulting in sustainable client ownership of Power BI assets.
- Overall cost-effectiveness of the proposal.

RFP Process

Phase 1: Review of submitted proposals

All proposals received will be subject to an evaluation to select the bidder who will provide the “best value,” taking into consideration the most beneficial combination of qualifications, services and cost and who has met the requirements of this RFP. Only proposals judged to be responsive to the submission requirements set forth in this RFP will be evaluated.

Phase 2: Oral presentation

The Research Foundation, at its discretion, may elect to have bidders provide oral presentations of their proposals. Oral presentations are for clarification purposes only.

Phase 3: Selection of vendor based on evaluation process.

Phase 1: Proposal Preparation & Submittal

07/28/26 – Managed Services RFP Issued.

08/10/26– Attachment A, APPLICATION FOR CONTRACT WITH THE RESEARCH FOUNDATION
FOR THE STATE UNIVERSITY OF NEW YORK AND BIDDER CERTIFICATION due.

08/11/26 Vendor inquiry period closes.

08/27/26 Final proposals due.

Phase 2: Internal Review of Proposals 09/01/26-09/05/26

The Research Foundation will conduct an internal review of all vendor proposals and select vendors for interviews and presentations.

Phase 3: Vendor Interviews & Presentations 09/08/26-09/10/26

The Research Foundation will conduct on-site interviews and presentations.

Phase 4: Vendor Selection & Contract Finalization 09/11/26

The Research Foundation will select the final vendor(s) and complete contract negotiations.

Attachment A

APPLICATION FOR CONTRACT WITH THE RESEARCH FOUNDATION FOR THE STATE UNIVERSITY OF NEW YORK AND BIDDER CERTIFICATION

PROGRAM TITLE: Power BI Architecture and Delivery

Advisory Services B I D D E R NAME: (company):

BIDDER CONTACT NAME:

ADDRESS1:

ADDRESS2:

TELEPHONE

FAX

NUMBER:

E-MAIL ADDRESS:

Compliance with RFP Conditions and State and Federal Laws

I (we), the undersigned, affirm that the bidder is willing to comply with all the conditions set forth in this Request For Proposal and with all applicable laws of the State of New York and the Government of the United States.

Willing To Contract

I (we), the undersigned, affirm that the bidder understands that a separate contract will be established, which will fully detail each party's responsibilities in relation to the services requested by this RFP.

I (We), the undersigned, attest that I am (we are) authorized to bind the bidder to the provisions of the attached proposal.

NAME AND TITLE OF INDIVIDUAL OR FIRM'S OFFICER AUTHORIZED TO SIGN CONTRACT: (PLEASE PRINT OR TYPE)

DATE: _____

NAME AND TITLE OF PROJECT DIRECTOR (IF DIFFERENT FROM ABOVE):

(PLEASE PRINT OR TYPE)

DATE: _____

SIGNATURE: _____

