# BI Community of Practice

## Minutes for 12/2/2015

Location

Nashville, TN, and Video Conference

### In attendance

* Jay Eckles (co-chair)
* Dennis Hengstler (co-chair)
* Denise Haley (Training & Support subcommittee chair)
* Ed Johnson (Tools subcommittee chair)
* Allen Dupont (Policy, Standards, and Definitions subcommittee chair)
* Mozhgan Shahidi (scribe)
* Denise Gardner
* Jeanne Hermann
* Steven Robertson
* Lisa Ford
* Mike Ebbs
* Kriss Gabourel
* John Toman
* Kristen Noblit
* Desiree McCullough
* Scott Gordy
* Les Mathews
* Susan Lazenby (substitute for Tom Hoover)

### Absent

* Tom Hoover (substitute present)
* Ron Loewen (Resources subcommittee chair)
* Mark Savage
* Janice Hodge
* Cyndie Nichols
* Shawn Bryan

### Agenda

1. Review strategy
2. Enumerate major differentiators observed
3. Prioritize features (including identifying features not of interest)
4. Discuss relative merits of RFP for a software suite versus RFPs for various pieces (e.g. a presentation tool)
5. Plan future steps:
	1. Identifying tool preferences
	2. Technical implementation planning
	3. Communication and testing planning
		1. Identify existing communication channels (e.g., listservs
	4. Strategy solidification

### Minutes

Jay Eckles called the meeting to order at 9:00 AM central time.

### Review strategy

Dr. Eckles displayed the strategy document and the group walked through it, particularly paying attention to the goals, the investment options, and the system diagram. Kristen Noblit offered options for how we might use existing tools in low or medium investment options.

The Community of Practice added the following goal to the strategy:

* User experience – improving accessibility to data -- including finding data – and improving clarity and effectiveness of use and presentation of data

Questions were raised and answered with respect to segmenting data across campuses.

Aside from the addition of the user experience goal, no changes were proposed or made to the strategy.

### Enumerate major differentiators observed

The CoP focus changed to talking about the overall impressions of the demos. The purpose of the RFI was to find the different pieces that CoP liked and build that into RFP.

Les Mathews introduced conversation about integrated packages versus individual pieces of software.

Ms. Noblit highlighted similarities among visualization tools.

The Community discussed all seven demonstrations, with various members providing overall impressions and identifying features that appeared to make the product (or product family) distinct from others.

Dr. Hengstler led the CoP in developing a matrix identifying our perceptions of each vendor with respect to presentation/visualization, data quality, and back-end “data stuff”. That matrix is reproduced in the extended notes.

At the end of this conversation, the community took a working lunch break for 45 minutes.

### Prioritize Features

Through conversation in the morning, any time a high-priority feature was mentioned, it was written on a white board to keep track. Upon reconvening from lunch, the group brainstormed other high-priority features, coming up with 24 unique items.

Dr. Eckles led the CoP through a multivoting exercise in order to illuminate group prioritization of these features. Each CoP member was given ten points and were instructed to allocate those appoints among the 24 features in whatever way they saw fit. An individual could allocate all 10 points to a single feature, allocate one point to ten features, or anything in between. The fact that there were fewer points than features meant that at a minimum each member had to identify their top 10 features. The features and their total points from the exercise are reproduced in the table below. Yellow highlighted items are those related to data quality; blue highlighted items are related to presentation/visualization, and green items are related to back end data functionality.

**Feature priorities**

|  |  |  |
| --- | --- | --- |
| **Category** |  **Feature:** | **Score** |
| Data quality | Data definitions – both functional and technical  | 16 |
| FrontE present. | User experience for consumers  | 15 |
| BackE data setup | Ability to draw from many sources  | 14 |
| FrontE present. | Increase access to data/reduce reliance on programmers  | 13 |
| FrontE present. | Graphics/visualization  | 12 |
| FrontE present. | Ease of embedding dashboards across platforms  | 11 |
| FrontE present. | Predictive tools/forecasting  | 11 |
| Data quality | Data lineage  | 10 |
| FrontE present. | Ad-hoc reporting  |  9 |
| BackE data setup | Extraction of data from sources  |  9 |
| BackE data setup | Fine grain access-security  |  8 |
| Data quality | Rule-based Data Quality  |  7 |
| FrontE present. | User experience for analyst  |  4 |
| BackE data setup | ETL  |  4 |
|  | Tight integration among components  |  4 |
|  | Canned reports  |  1 |
|  | GIS/mapping  |  1 |
|  | Workflow for definition changes  |  1 |
|  | Training  |  1 |
|  | Scheduling  |  0 |
|  | Mobile delivery  |  0 |
|  | Data steward identification  |  0 |
|  | Natural language querying  |  0 |
|  | Ability to support many front-ends  |  0 |

### Discuss relative merits of RFP for a software suite versus RFPs for various pieces

The CoP members discussed three options for the RFP: a single RFP requesting proposals for a single integrated system providing all requested functionality; multiple RFPs each requesting proposals for a distinct component of the BI platform; and a hybrid RFP with distinct sections requesting proposals and separate pricing information for each section. Allen DuPont offered the argument that a single vendor needs to be responsible for the quality of the overall BI system, meaning a single RFP for an integrated package or a single RFP with a bid awarded to a single third-party integrator who takes responsibility for interoperability.

The CoP appeared to lean towards the hybrid approach. Questions were raised about whether the purchasing process would allow multiple bids to be awarded from a single RFP (for example, if Vendor A was selected for presentation layer software and Vendor B was selected for data quality and back end software). Another question raised was what triggers the requirement for an RFP if the University already has contracts in place with vendors for portions of their overall platform (for example, UT has a contract with Microsoft that generally allows us to purchase anything from the Microsoft catalog). Dr. Eckles will contact purchasing to get the answers to these questions.

### Plan future steps

#### Identifying tool preferences

At this point it is unclear which tool CoP recommends. Two vendors stood out from the rest in discussions throughout the day. The CoP will use the information obtained from the demos to build an RFP. But the CoP also need a level of investment for the RFP to say what tools they will use.

#### Technical implementation planning

The CoP reviewed the proposed phase-based implementation approach described in the strategy document. The expected timeline for this approach is 2-3 years, with a strategy review conducted at the end of that time.

#### Communication and testing planning

The CoP will need to put together a communication plan to identify:

* Who needs to know
* What’s going on
* At what points in time the messages need to be delivered
* How to deliver those messages

#### Strategy solidification

The CoP will meet in two weeks, hopefully to consider the strategy. Drs. Eckles and Hengstler will continue to work on the Data Governance document. The CoP intends to send the strategy document to SITC at their January meeting. Construction of the RFP will begin immediately so that it is ready to publish once the strategy is approved by SITC.

Dr. Eckles concluded the meeting at 2:00 by thanking everyone for attendance and participation.