Request for Proposal No. 2021-046

Project and Portfolio Management System

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ADDENDUM No. 1

ISSUE DATE: February 19, 2021

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

A) Deletions/Additions/Clarification

1) <u>Clarification/Comment</u> :

   Union County appreciates your interest in this project. We have attempted to answer the questions listed below to the best of our ability. We believe the core requirements were accurately listed in the RFP (Section 4). As experts in the industry, we leave it to you to provide us a description and outline of your software, and a proposal on how it might fit into our basic understanding of what we require. One item in particular that is listed in the "Requirements" section probably best describes our current need: a system that's *Process Based.* This means that a system will by design, be able to mirror our unique process and workflow. Our "Project Management" capabilities and maturity level, in terms of certification and practice, is low. We are a small to medium sized water utility comprised of civil engineers, planners, and analysts. Again, thank you for the time and interest in our project, and we look forward to reviewing your proposals from all interested bidders.

2) Item 2.3, Proposal Questions, second paragraph, first sentence: **Delete** "…email to ~~Corey Brooks~~ and **REPLACE** with "…Cheryl Wright…"

3) Item 5.1, Tab C, second bullet point: **Delete** "…Tab C above…" and **REPLACE** with "…Tab B above…"

4) Item 7.1, 3rd paragraph: **Delete** in its entirety and **REPLACE** with the following;

   "All material received in response to this RFP shall become the property of Union County and will not be returned to the vendor. Any and all costs incurred by firms/vendors in preparing, submitting or presenting proposals are the firm/vendor's sole responsibility and Union County shall not reimburse any vendor for such costs. All responses to this solicitation become public record after award and are subject to all public information request laws.

   Therefore, proposals should include very little to no "trade secret" (proprietary/confidential) information to avoid such information being released. Any necessary response page containing "trade secret" (proprietary/confidential) information must be clearly stamped as such. The County will make final judgment as to the validity of the claim based on the definitions of Trade Secrets as contained in North Carolina General Statute and will attempt to restrict such information from disclosure. In no case shall Union County be held responsible for, bear liability for, or pay damages of any sort caused by, the release of information contained in any document submitted in response to this solicitation regardless of how marked. No proposal is to be marked "TRADE-SECRET", "PROPRIETARY" or "CONFIDENTIAL" in its entirety."

B) Question and Answers

1. **Question:** What is the number of projects currently in management? **Answer:** Projects in the 100s
2. **Questions:** What users roles and quantities require access to this tool
   a. Project Managers
   b. Resource Managers
   c. Team Members/Timesheet Users
   d. Portfolio Managers
   e. Report Viewers
   f. Project Requestors

   Answer: * Please describe each category that your system uses, as well as cost, if applicable.

3. **Question:** Will the intended users for this tool have subscriptions to Microsoft Office 365? **Answer:** No

4. **Question:** Please indicate if any of these tools are currently used: MS Teams, PowerBI, MS Planner, Sharepoint, MS Project. **Answer:** None

5. **Question:** What departments besides PW intends to use this tool? **Answer:** None

6. **Question:** What Incumbent tools are used to manage projects now? **Answer:** Described in RFP

7. **Question:** What is the annual spend on above tools? **Answer:** NA

8. **Question:** What similar tools are the decision makers familiar that meet your requirements? **Answer:** None

9. **Question:** Does county have formal prioritization process to assign a priority to potential investments to start new capital project or refurbish existing one for each asset group? **Answer**: Not currently

10. **Question:** Please identify each asset group that will be managed by this tool. **Answer:** NA

11. **Question:** Can database solution be NoSQL Answer: No

12. **Question:** Does Union County currently run SAP as their Enterprise Resource Planning system? **Answer:** Not available at this time.

13. **Question:** If so, does Union County currently make use of SAP's Project Systems module? **Answer:** NA

14. **Question:** Please setup a conference call for vendors to have an interactive discussion of your requirements, so the high-level requirements can be further elaborated. **Answer:** Please submit the best proposal that you can with the information provided

15. **Question:** What platforms does the county have it prefers to use – Amazon, Oracle, Microsoft, or others? **Answer:** Agnostic other than no Oracle

16. **Question:** What is the a desired starting or finishing time frame for this effort?
Answer: End date of Fall, 2021

17. **Question:** Please share any legacy or new reports or dashboard you want created.
Answer: Please describe the ability and methods of your software to create reports

18. **Question:** What is the functional results desired in the integration between the PPM tool and Tylor ERP tool? **Answer:** Import basic flat file from Munis into system to update vendor and payment transactions

19. **Question:** What departments is this tool foreseen to be extended to in the future? **Answer:** None

20. **Question:** What reporting software is currently used or intended to be used soon? **Answer:** We will create custom SQL reports as well as pool the project data into a PowerBI database warehouse

21. **Question:** We understand e-verify purpose is to insure workers in USA have valid work permits. Do the County's regulations allow some work to be performed by workers in other countries with valid work permits for their country? If not, do you allow waivers from this? **Answer:** Union County adheres to the U.S. Department of Homeland Security's E-Verify system confirmation requirements.

22. **Question:** What is the desired deliverables that you want from "evaluate and analyze current processes and technologies". **Answer:** Provide a general description and framework for scoping activity at beginning of project.

23. **Question:** Will your governance process documentation be updated to current project portfolio processes by the start of this contract for vendors to review? **Answer:** As required for short listed offerors.

24. **Question:** Besides Tyler integration what other apps need integration? For each one, please explain what is the desired functional results for each integration. **Answer:** No others required

25. **Question:** On page 5, it states that the Public Works utilizes a PMIS System and spreadsheets. IS this a custom solution or a packaged solution – if so, what is the solution? **Answer:** Custom solution

26. **Question:** Have you received any demonstration of any products? **Answer:** Several through high level research effort to determine market offering and availability; none during RFP

27. **Question:** What is the number of internal users including consultants working on behalf of the county? **Answer:** 50-200 who might access system in various methods

28. **Question:** Does the county expect to provide access to contractors – external resources? If so, how many users? **Answer:** No

29. **Question:** Integration between MUNIS and the selected solution – should this be automated? Or are you expected to feed files manually? If automated, is this effort to be included in our efforts?
Answer: Import basic flat file from Munis into system to update vendor and payment transactions

30. **Question:** Aer you currently using a reporting solution (ie. PowerBi) ---? If so, which one?
Answer: SQL Report Writer and PowerBI

31. **Question:** Tab C instructions refer to Tab C. Should this be a reference to Tab B?
Answer: Yes. Refer to item 3, in Section A above.

32. **Question:** How many users do you anticipate? In what roles?
Answer: 50-200; admin, edit, view

33. **Question:** Can you further break down users by organization? **Answer:** NA

34. **Question:** What features or capabilities do you anticipate having by integrating with MUNI?
Answer: Import basic flat file from Munis into system to update vendor and payment transactions

35. **Question:** In addition to MUNI, are there known integrations needed? Please itemize.
Answer: None

36. **Question:** How has your COVID-19 response impacted working on site? What are your guidelines for returning to work on site? **Answer:** Union County guidelines for working onsite during COVID varies.

37. **Question:** If remote work is possible will you require on site work at any point?
Answer: No on site work required

38. **Question:** Will you import existing projects into the new system or will you introduce only new projects to the new system? **Answer:** Import preferred

39. **Question:** Will you import closed projects into the new system? **Answer:** Yes

40. **Question:** Do you have one or more PMOs (Program or Project Management Offices)?
Answer: No

41. **Question:** If so, how many and where are they located in the organization? **Answer:** NA

42. **Question:** If so, what are the primary functions of the PMOs? **Answer:** NA

43. **Question:** Typically, how many projects are launched annually? Of what size, scale, and complexity?
Answer: CIP Projects updated every 10 years with Master Plan, as well as CIP revisions. New Development can vary between 20-100 projects per year.

44. **Question:** What PMISs are currently in use? **Answer:** Custom and spreadsheets

45. **Question:** The RFP title includes portfolio management, but the requirements of section 4.0 seem to address project management. Can you elaborate on your portfolio management expectations?
Answer: Our CIP has a set of programs which include various projects.

46. Question: What is Cheryl Wright's full phone number? **Answer:** 704-283-3563

47. Question: Must we file to do business in NC before vendor selection, or can we assert that we will file if selected? **Answer:** Licenses in the RFP.

48. Question: Would the county be open to licensing the software from the software company and contracting services provided the implantation firm?   Or does it have to be all on the same contract? **Answer:** No preference

49. Question: Can you provide an estimated number of anticipated users for the project and portfolio management system? **Answer:** 50-200

50. Question: Please clarify the number of users required and their roles. If you do not have an exact number, please provide an approximation at this stage because it is an important factor in deciding on our bid decision for this RFP. **Answer:** 50-200; admin, edit, view. Please describe the method your software uses to manage users, and how they are priced, if applicable.

51. Question: For developer and capital projects, what level of granularity do you envision tracking for capital management projects (e.g. cost codes, phase/milestone vs. field-level activity, level of estimation, resource rates, jobs)? **Answer:** Please describe what level of granularity your software provides.

52. Question: Will the Union County Government act as the general contractor (GC) in capital and developer projects or are you looking to manage GCs who execute on said projects? If it's the former, are you looking for the platform to capture/track contractor billings? **Answer:** We do contract out our CIP projects, and track billing/invoicing

53. Question: For 4.1, Integration with 3rd party systems, we note that the RFP mentions Munis ERP. For any integration requirements you require us to scope as part of the RFP response, please provide descriptions and/or diagrams of the desired business outcomes, field mapping, and use cases for integrations. Additionally, please provide information about the version, cloud vs. on-premise and whether API access is available to you for platforms listed you wish your portfolio and project management system to integrate with. **Answer:** Import basic flat file from Munis into system to update vendor and payment transactions

54. Question: For 4.1, please elaborate on your functional and technical expectations from mobile access. **Answer:** Please describe your mobile offerings

55. Question: Logic Software (Easy Projects) is based in Canada. We have clients in over 70 countries and the majority of our clients are in the USA. Is having an office/registered business in the USA a factor in your evaluation? If so, please elaborate. **Answer:** Responding vendors must meet the requirements listed in the RFP.

56. **Question:** Will all departments be required to operate the same way, or will departments have latitude to change the governing rules? **Answer:** The departments will operate within their desired workflow, and will continually improve over time, in a managed and coordinated fashion

57. **Question:** How many total projects will be imported into the new system? From how many departments? **Answer:** Only CIP and New Development Projects will be imported. Several hundred of each.

58. **Question:** Do you currently offer any training to your PMO or project management staff? **Answer:** NA

59. **Question:** What % of project managers are PMP certified? **Answer:** NA

60. **Question:** Do you follow PMBOK? **Answer:** No

61. **Question:** At what level of maturity does the county currently operate? **Answer:** NA

62. **Question:** Does the county operate a helpdesk and will the winning vendor need to integrate into the county helpdesk? Would the winning vendor need to pay a fee to integrate? **Answer:** No integration needed

63. **Question:** Has the County met with or seen demonstrations from any vendors who offer a Project Information Management Software? If yes, please provide a list of the vendors. **Answer:** Several through high level research effort to determine market offering and availability; none during RFP

64. **Question:** What software does the County currently use for Project Information Management? **Answer:** A custom application and spreadsheets

65. **Question:** Since the scope detail is limited in the County's RFP, should Offeror's propose a best-practices scope based on similar implementations; and, does the County expect to fine tune the scope as part of the selection and award process? **Answer:** Yes

66. **Question:** Please extend the proposal due date by two weeks and if an extension is not possible, please explain the urgency. **Answer:** The due date will remain the same at this time.

67. **Question:** How many users, both internal and external to the County will need to use the system. **Answer:** 50-100, admi, edit, viewer

68. **Question:** What is the combined average annual capital spend for the departments included? **Answer:** Only applicable to CIP, and it varies by year and approved budget

69. **Question:** Has a budget for the system been established and can you share what the budget is? **Answer:** NTE 60k

70. **Question:** Team Collaboration – please explain what this entails exactly: **Answer:** Please describe any collaboration features in your solution

71. **Question:** Is there any prioritization on the requirements list ? **Answer:** No
    a. Some weigh more than others?

72. **Question:** The total requirements are only addressed well by an enterprise software system
    b. These start at an average of approximately $500,000 including both implementation and user licenses, for a 3 year SaaS cloud-based option (which includes all maintenance, support, upgrades etc), much less for on-premise perpetual – purchase with optional annual maintenance)
        i. Which direction are you budgeting for ?
    Answer: Budget NTE $60k. Cloud system preferred.

73. **Question:** Can you please provide number of users by role and those requiring access to the new PPM solution? We require admin/edit/view users. **Answer:** Please describe the structure of your user/role/licensing functionality.

74. **Question:** Is Union County able to identify which modules of PPM they would plan to implement? It includes Demand, Project, Program, Portfolio, Resource, Finance and Time Management.
    Answer: Please describe these modules that are within your platform.

75. **Question:** Will legacy data need to be imported into the new PPM solution? **Answer:** Yes

76. **Question:** What is the database and version used for PIMS? **Answer:** SQL 2012

77. **Question:** Which 3rd party systems does Union county currently use?
    Answer: Designed by Jacobs Eng.

78. **Question:** What is the database system used by Union County finance system Tyler Technologies – Munis? **Answer:** SQL

79. **Question:** What financial information is stored in Union County finance system Tyler Technologies – Munis? Does it include contractor/consultant, employee rates, Project financials and so on?
    Answer: The integration will import basic flat file from Munis into system to update vendor and payment transactions

80. **Question:** Will Union County's resources be available during implementation - like DBA, server administrators? **Answer:** Yes

81. **Question:** Can you please list all the software programs currently being used by Union county for which integration test needs to be performed. **Answer:** None; see also question 79

82. **Question:** Can you provide examples of reports currently being used? **Answer:** NA

83. **Question:** Can you provide the different project types and processes to be used?
    Answer: These examples will potentially be shared in short-list demonstrations

84. **Question:** What additional clarity can you provide regarding the core features: Team Collaboration, Risk Management, Resource Management? What kind of features are you looking for and/or how will these be used? **Answer:** Hello, please describe in your proposal, the provisions of these features within your software.

85. **Question:** Which one of these approaches best matches the solution you are looking for, and are there any approaches that would NOT be acceptable approaches: **Answer:** "C" is not acceptable
    a. Implementation of a product that best meets your required features
    b. Implementation of a customizable product that best meets your required features, and is then customized to fully meet your required features
    c. Creation and implementation of a fully customizable solution that fully meets your required features

86. **Question:** How many internal users and external (contractors) will be using the system? **Answer:** Approx 3 admin, 20 -50 editors, and 25 view level.

87. **Question:** Is Cyber or Professional liability insurance required? **Answer:** Refer to the Insurance language listed in the RFP.

88. **Question:** Does the County have middleware to handle the integrations? **Answer:** The integration will import basic flat file from Munis into system to update vendor and payment transactions.

89. **Question:** Does the County use a Scheduling software? If so, what is the name of the Scheduling software? **Answer:** Various

90. **Question:** What will direct access to the SQL databased be used for? **Answer:** NA

91. **Question:** In section 4.2 you have your core features listed, can you list them in order of their importance? **Answer:** None

92. **Question:** Also, in section 4.2 you have customization as a core feature, Are you able to give more detail in terms of what you're looking for in each of those "core features"? **Answer:** Please describe the capabilities in your solution

93. **Question:** Since the amount of user licenses needed are unknown and affects the ability to obtain best pricing; would you consider extending the RFP due date based upon when the number of user licenses are made available to vendors? **Answer:** At this time, we are moving forward with this project.

94. **Question:** What PIMS solution is the Public Works department using? **Answer:** Created by Jacobs Engineering

95. **Question:** Team Collaboration – please explain what this entails exactly **Answer:** This could be the ability to share internal comments/questions/notes on a particular element of a project.

96. **Question:** Is there any prioritization on the requirements list? **Answer:** No

97. **Question:** Some weigh more than others? **Answer:** No

98. Question: The total requirements are only addressed well by an enterprise software system These start at an average of approximately $500,000 including both implementation and user licenses, for a 3 year SaaS cloud-based option (which includes all maintenance, support, upgrades etc), much less for on-premise perpetual – purchase with optional annual maintenance) Which direction are you budgeting for ?
Answer: Not available at this time.

99. Question: Can you offer any additional information as to what type of costs you will be tracking in the Cost Management module? **Answer:** Costs associated with water/sewer Capital Improvement Projects (design, material, labor…)

100. Question: How many users will be entering data and managing projects into the system?
Answer: Approx. 20-50

101. Question: How many users will need to be trained on the system? **Answer:** Same as above

102. Question: Once the vendor has been chosen, what is the timetable that you anticipate for go-live? **Answer:** Would prefer to go live in Q3/Q4 of 2021

103. Question: How many licenses do you need for the platform? **Answer:** Please describe your licensing structure; Approx 3 admin, 20 -50 editors, and 25 view level.

104. Question: We use a named, active user model (not concurrent). Can you tell us the number of individuals in your environment that: **Answer:** Approx 3 admin, 20 -50 editors, and 25 view level.

105. Question: Would need access to the system to log in to accept, work on, and complete project tasks? In other words, people as a part of a project team. **Answer:** To be determined.

106. Question: Would need access to the system to manage projects and assign work and tasks to others? In other words, your number of project managers. **Answer:** To be determined.

107. Question: Please advise if you would like responses to any of the subsections in Section 4 – Scope of Work. If so, where should they be included in our submission?
Answer: Include information regarding Section 4-Scope of Work in applicable "TAB's" listed in Section 5 – Detailed Submittal Requirements.

108. Question: Could you provide a list of any construction project management software vendors The County has reviewed within the last 12 months? **Answer:** Not available.

109. Question: In order to more accurately quote the training, consulting and license needs, please provide a high-level breakout of the users' roles. For example, how many users work in each of the following areas:
Answer: Approx 3 admin, 20 -50 editors, and 25 view level.
o How many work with cost management?
o How many work in field management?
o How many are officials and require read-only and/or ability to approve business processes?
o Approximately how many 3rd parties (Architects, Contractors, Consultants)?

110. Question: What schedule software is currently in use? **Answer:** None

111. Question: Could you provide us with a high level over-view of how the software should integrate with MUNIS? What data is shared between the systems (budgets, contracts, invoices) and the direction of the shared data (From MUMIS or To MUNIS)? **Answer:** The integration will import basic flat file from Munis into system to update vendor and payment transactions.

112. Question: The second bullet point in tab C is self-referential, should this be Tab B or another tab?
Answer: Yes. Refer to item 3, in section A., above.
TAB C- PROJECT STRATEGY AND WORK PLAN
As appropriate to the task, and under the direction of the OWNER, the FIRM shal
l implement an Agile task management approach to the following
- A brief description of each task and its work products. Include milestone, a ssociated work products and desired outcomes.
- Include the items listed in Tab C above in the detailed project plan.
- Describe the Warranty and Maintenance Plan (annually).

113. **Question:** Is there a target go-live date? **Answer:** Q3/Q4 2021

114. **Question:** Is Union County currently leveraging Office 365 Government Community? **Answer:** No
If so, what plan is being leveraged and what applications (Teams, Planner, Exchange Online, OneNote, OneDrive, etc.) have been deployed?

115. **Question:** In section 4.1 you mention 3rd party integrations. Can you share what systems you envision the solution being integrated with? **Answer:** The integration will import basic flat file from Munis into system to update vendor and payment transactions.

116. **Question:** Can you share what project management solution your current PIMS systems utilizes. Custom PIMS by Jacobs Engineering, and spreadsheets. **Answer:** Refer to above.

117. **Question:** Does Union County leverage any business intelligence platforms currently to facilitate reporting? **Answer:** Yes, PowerBI and SQL Report Writer

118. **Question:** Do you have any specific reporting requirements? For example, you might have reports you produce currently to manage resource demand or timesheets. **Answer:** We have some general reporting needs, but those will be developed in tandem with config and implementation

119. **Question:** Will reports / dashboards be developed from scratch, or do they currently exist in some format (e.g., Excel)? Are there examples for review to better assess size and scope?
Answer: Mostly from scratch

120. **Question:** How many reports do you anticipate requiring? **Answer:** Unknown at this time

121. **Question:** Do you plan to utilize lifecycle workflows to route project requests through from ideation to completion? If so: **Answer:** Yes; please describe the capability of your system regarding process based workflow. Will review our specifics in shortlist review
   a. Will you require more than one workflow?
   b. Are the workflow(s) you require already documented (as far as what you would like the system to do)?

122. **Question:** Approximately how many of the following will be configured within Union County's Project Online environment. **Answer:** Please describe these capabilities in your proposal

c. Enterprise calendars
d. Project site templates
e. Resources
f. Login users
g. Custom fields
h. Custom views
i. Which type(s) of training are anticipated? Potential type / roles: **Answer:** We anticipate that everyone will need some form of training on a new software
j. Team members
k. Resource managers
l. Project managers / program managers
m. Portfolio managers
n. Executives / reports
o. How many training sessions/workshops are envisioned for each group?

123. **Question:** Is there information available regarding the types and anticipated number of system users? **Answer:** Approx 3 admin, 20 -50 editors, and 25 view level.
    o How many portfolio managers are anticipated?
    o How many resource managers are anticipated?
    o How many project managers are anticipated?
    o How many general (team member) users are anticipated?

124. **Question:** Are vendor provider resources allowed to perform work remotely? **Answer:** Yes

125. **Question:** If work can be performed remotely, are there a minimum number of on on-site visits required/desired? **Answer:** No

126. **Question:** Is Active Directory integrated/synced with Office365? If not, is this part of scope to integrate AD to Office 365? **Answer:** No. No Office 365 available or licensed

127. **Question:** What is the County's budgeted capital spend on construction projects for the current fiscal year? **Answer:** To be determined for this project.

128. **Question:** What is the County's projected capital spend on construction projects for the next fiscal year? For the next five (5) years? **Answer:** To be determined for this project.

129. **Question:** Is the County's current PIMS application an in-house developed system? Or is it a COTS (Commercial-off-the-Shelf) based system? If it is COTS, please identify the vendor. **Answer:** It's a custom solution built by Jacobs Engineering

130. **Question:** Which County departments besides Public Works are planning to utilize the selected Project and Portfolio Management System now or in the future? Transportation? Water and Sewer? Parks and Recreation? **Answer:** Public Works is only Water/Sewer. This is the only department.

131. **Question:** Please describe the user community the County anticipates will utilize the selected system. Please identify, at a minimum, the number of internal and external users who will be set up to use the solution when it goes live. How many users will be set up to be System Administrators?
    Answer: Approx 3 admin, 20 -50 editors, and 25 view level.

132. Question: Data migration is not identified in the RFP. Will data migration services will be required? If data migration services are needed, please provide more detail about the nature of the data and the volume (e.g., systems the data is being extracted from, type of data, amount of data, etc.). **Answer:** Primary import will be current CIP program (tens) and projects (hundreds). Currently, the CIP has 24 Programs and 116 Projects. In our New Development section, the import will be several hundred projects submitted by developers. This will be a spreadsheet import consisting of approx.. 100 fields.

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End of Addendum #1