REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-68

PROJECT PORTFOLIO MANAGEMENT SOFTWARE

<u>QUESTIONS AND ANSWERS NO. 1</u>

Date: August 3, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

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1. Has HCCS seen any demonstrations of a new PPM system from vendors? If yes, what systems has HCCS seen?

   Answer: During the early market research phase, prior to the issuance of the RFP, product demonstrations were held with Innotas, Clarizen, LiquidPlanner and ManageUP.

2. What current systems are in use at HCCS?

   Answer: HCC has a number of disparate applications being used such as Smartsheet, Microsoft Project, Jira, etc.

3. Please elaborate on what is not working with your current solution both in terms of functional shortcomings and business processes that are being impacted.

   Answer: Various departments at HCC are using different applications. The lack of a standard tool is an issue for us.

4. Page 4: Security / User Management: Can a breakdown be provided of the internal and external users? How many will be full time users? How many will be part time? Who will look up project   data or run reports? Project Managers? Outside vendors / contractors?

   Answer:
   >   Internal FT users: <200.
   >   Internal power users: ~25.
   >   Internal lite users/task oriented users: Varies but could be as many as 1,000.
   >   Internal view only users: <50.
   >   External users: Number of vendors/contractors varies.

5. Page 4: Interfaces: Please confirm that pricing is required only for the 4 interfaces not marked as optional (Laserfiche, Active Directory, MS 365, and MS Project). Unit pricing can be provided for the optional interfaces.

Answer: Pricing for the solution in accordance with the entire scope of services is required. This includes pricing for the list of applications noted in Section 1.2.f (page 4 of 38). Proposers are asked to provide a price for the required application interfaces in addition to a price for any of the optional applications that you may be able to provide.

6. Based on how HCC does project portfolio management today, how much change will a new automated system bring to the stakeholders?

    Answer: This is an enterprise automation change. We do not currently have a standard portfolio/project management application but use various applications.

7. Other than the pre-proposal meeting is there another mechanism for sub-contractors to know what primes are bidding on the RFP?

    Answer: To help small business firms, the pre-proposal meeting sign-in sheet has been posted to the RFP website, this is intended to help both prime contractors and sub-contractors and includes company and representative names, phone number and email address.

8. Does the 3-year contract include the project lifecycle implementation and post-go live support?

    Answer: Yes.

9. How important is "change adoption" to the overall HCC transformation efforts and the scope of this project?

    Answer: HCC is just adopting a change management model. Change adoption is critical to our mission and future state.

10. How many power users?

    Answer: Approximately 25

11. How many lite users (users receiving tasks to be either completed / hours tracked against)?

     Answer: Approximately 1000

12. How many requester, reviewer and approvers in the system?

    Answer: Will vary based on the HCC defined processes (see Q&A # 5 above).

13. Is the scope of this project to propose new, custom built software that is not dependent on using software like MS Project Server in the back-end?

    Answer: HCC is not looking for a custom built software solution or application.

14. Does HCC currently have active licenses to Smartsheet?

    Answer: Yes, enterprise license.

15. Does HCC currently have active licenses to SharePoint/Office 365?

    Answer: Yes, enterprise license.

16. Can a vendor respond to this RFP in 2 capacities: as a prime vendor as well as a sub-contractor to a prime?

    Answer: Yes.

Balance of page intentionally left blank.

Date: August 14, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. Is HCC looking for a scheduling tool to be a part of the PPM solution or willing to use MS Project or Primveria to integrate with the PPM?
   Answer: This is a vendor decision. HCC is licensed for MS Project.

2. Are you needing other parts of project management solutions not listed i.e. contracts management, document control, timesheet management, accounting and finance? If so, do you want all these solutions to integrate with one another in the PPM tool? Great question, I suspect they do, but may not be aware they do, for the first three and that they have something in place for accounting and finance that will need to be integrated.
   Answer: Document control is needed; the others are not.

3. How robust is HCC's current process and procedures now? Are there written down project management policies and procedures in place? If not would this be required with the PPM solution? I doubt that they're sufficiently robust and that this would be not part of this RFP but a parallel opportunity, but definitely worth asking to confirm if in or out of scope.
   Answer: Process and procedures vary across departments. HCC is working toward a standardized set of processes and procedures.

4. Does HCC have a project controls department?
   Answer: Yes, it is a new department.

5. If no project controls department is in house does the current PM group handle these functions?
   Answer: N/A

6. If the PM group handles these functions how long has the PM group been executing projects?
   Answer: The institution-wide PCMO has been in existence for less than one year. IT and Facilities have executed projects for many years.

7. Is HCC looking for more of a business continuity solution (project risks) or a Monte Carlo simulation? If Monte Carlo is needed, is HCC willing to use a third-party software and integrate with the PPM tool?
   Answer: HCC does not require Monte Carlo simulation.

8. Training and certification, is HCC wanting a yearly training and certification for all read write users for each major function within the PPM tool? If so will a LMS (learning management system) suffice to augment face to face training?
  Answer:HCC requires training associated with implementation; no other yearly face-to-face training is required.

9. How many anticipated read write users are expected to use the system?
  Answer: The following estimations were given as the answer to a different question but apply here as well. With the exception of the internal view only users, all of the following may need read write access.
  Answer:
  Internal FT users: <200
  Internal power users: ~25
  Internal lite users/task oriented users: Varies but could be as many as 1,000
  Internal view only users: <50
  External users: Number of vendors/contractors varies

10. Is contingency management needed?
  Answer: No

11. Is management of change / change order management (MOC) needed?
  Answer: Management of change should be built in as a system function not as a vendor service.

12. If MOC is needed will it require workflow? If workflow is needed does HCC have an establish process with grants of authority / signature process?
  Answer: Yes, a workflow is required for MOC. HCC does not have an establish process yet; we are working on this.

13. Will OCM (organizational change management) be required for the implementer?
  Answer: This will be done internally.

14. Are hard copy user manuals needed/wanted? Great question and I hope not!
  Answer: No, not necessarily

15. If manual is needed will HCC want the implementer to update the manuals annually?
  Answer: N/A

16. Is training required for read only licenses individuals? If so will an online LMS suffice?
  Answer: No, training is not required for read only licensed individuals.

17. Does HCC need a system that tracks a project through the stage gate process?
  Answer: Yes

18. Is HCC needing /wanting a system or service that requires IPA (independent project audit) solution
  Answer: No, an IPA solution is not necessary.

19. What is the total number of HCC staff members?
    Answer: 2,386 full time

20. What would be the exact number of users who will be accessing the PPM solution?
     Answer:
    Internal FT users: <200
    Internal power users: ~25
    Internal lite users/task oriented users: Varies but could be as many as 1,000
    Internal view only users: <50
    External users: Number of vendors/contractors varies

21. Currently, what PPM tools are being used by HCC?
    Answer: PPM tools vary across departments. HCC has a number of disparate applications being used such as Smartsheet, Microsoft Project, Jira, etc. HCC is working toward deploying a standardize application for PM.

22. If there is a current tool in use, then what data, if any, needs to be migrated?

    • Will Project Documents require migration to the PPM system for ongoing (inflight) and historical (closed, cancelled, inactive) Project Items and what is their approximate cumulative size in GBs?
     Answer: No

    • Are you maintaining project artifacts (e.g., documents) that need to be migrated to project SharePoint sites in PPM? On what platforms are those documents maintained?
    Answer: No

23. As part of the import/export requirement, are there any external system integrations (into PPM or out of PPM) for data synchronization that will be required?
    Answer: No

24. List any applications you need to import data to PPM for periodic reports.
    Answer: None other than those listed in the RFP.

25. Is your organization using Active Directory (Exchange) or Office 365 Active Directory authentication? If so, then which authentication will be the primary user authentication method?
    Answer: Office 365 Active Directory

26. Is there a secondary authentication method that will require setup (e.g. LDAP)?
    Answer: No, only primary is needed.

27. Similarly, do you expect to synchronize your PPM solution to Active Directory for users, resources, or both?
    Answer: For users

28. Will users need to access the system from geographically dispersed campus/remote locations?
    Answer: Yes, but the solution should be cloud-based.

29. Is there an existing Office 365 environment and/or SharePoint? If so then what version of SharePoint is deployed? Or will any services be needed to advise or configure the tenant, SharePoint, identity, etc.?
    Answer: Yes, for both Office 365 and for SharePoint. The expectation is that the vendor will accommodate Office 365/2016. No services will be needed to advise or configure the tenant, SharePoint, identity, etc.

30. Should additional PPM environments be setup for dev, test, staging (or other) processes?
    Answer: Yes

31. Of the 100-1,000 projects, approximately how many are ongoing (inflight) and how many are considered historical (closed, cancelled, inactive)? Will all projects need to be included in the initial deployment?
    Answer: HCC will only add new projects as they arise to the application.

32. How detailed are the projects in terms of tasks and resources?
    Answer: It varies by project.

33. How many resources (Generic and Named) will be in the resource pool?
    Answer: HCC is not expecting the vendor to manage the resource pool.

34. How many reports are expected to be created in the new environment? Do you have example reports that you plan to replicate or create?
    Answer: HCC will use whatever templates are provided by the vendor.

35. Is there a requirement for team members to provide status updates and/or time entry in the system?
Answer:
    Status updates – Yes
    Time entry - No
        • Do you need to capture time worked on tasks through either manual timesheet entry or integration with a timekeeping system?
        Answer: No

        • If time entry is required, should it also include administrative and non-project time?
        Answer: N/A

36. How many and which organizations are expected to use PPM? For example, IT and Facilities departments can often leverage the same environment with appropriate configuration considerations.
    Answer: From a project management perspective, the entire organization will use of the application, including IT and Facilities PM and the enterprise-wide Project and Change Management Office.

37. Do you need to deploy environments (i.e., Development, Test, Training) in addition to your Production environment? If so, then how many?
Answer: Yes, the vendor should make a recommendation on this.

38. Please specify the number of users by role that will require training.
Answer:
Power Users: ~25
Train-the-trainer population: ~25

39. Do the HCC project managers currently experienced with/using the MS Project desktop application?
Answer: Some do; the experience level varies by department and job scope. The vendor is not expected to provide MS Project training.

40. A phased approach to this deployment may be necessary for any number of reasons which could include culture, change management, budget, resource availability. Can you indicate if you have any need or preference to deploy certain functionality as part of an initial phase?
Answer: HCC defers to the vendor's recommendation based on best practice.

41. Do you have minimum requirements for a post-implementation support plan?
Answer: HCC defers to the vendor to recommend the (a) minimum and (b) optimum post-implementation support needed.

42. What software solutions does HCCS use for change management and operational work tracking?
Answer: IT has a customized, internally-developed system for change management. For operational work tracking, the organization uses TracDat.

43. We may have missed this, but how many users will need access to the system? TeamDynamix provides 2 different licenses relative to our Project Portfolio Management software - in a named user model, which are attached with this note. It should be clearly noted that clients, requesters of projects, project stakeholders and individuals that need to be INFORMED ONLY are all FREE. We call those Client Users - just FYI. You do not have to include Client Users in the license count estimations.
Answer:
Internal FT users: <200
Internal power users: ~25
Internal lite users/task oriented users: Varies but could be as many as 1,000
Internal view only users (client users): <50
External users: Number of vendors/contractors varies

44. Section 2 – pricing. Our cloud based PPM offerings are subscription based.
    a.   Subscriptions are generally divided into two types
         i.   Planner licenses – these are for portfolio, program and project managers, or anyone that needs to update a project plan (more costly)
         ii.   Worker licenses – these are for resources that need to perform tasks that have been assigned to them by someone with a planning license (less costly)
    b.   To properly quote pricing could HCC identify a count of licenses required for each - How many Planners? Workers?

Answer:
Planners (internal FT users will be phased in over a 3-year period):
- Internal FT users: <200
- Internal power users: ~25

Workers (the first two below will be phased in over a 3-year period):
- Internal lite users/task oriented users: Varies but could be as many as 1,000
- External users: Number of vendors/contractors varies
- Internal view only users: <50

45. Page 3 (second b entry) "Online/offline access from smartphones…" Could HCC please provide more detail in what functionality you are seeking while offline?
Answer: Offline functionality is not needed; HCC wants a true mobile solution.

46. Page 14 (4.c.4.ii) "Provide a detailed list where your firm has provided services of the type and kind required in this RFP during the past 3…" How many project references are you looking for here?
Answer: Proposers are encouraged to provide as many references as possible that may help in understanding the breath or qualification and experience the firm may have in performing the type of work included in the solicitation.

47. Section 1
- Was there an RFI published in conjunction with this RFP? No
- Is there currently a system in place that provides any type of PPM support? Various applications are used by different departments. See previous answers.
- If a system is already in place, will the system's data require migration? No
- If migration is required, can you provide details about the system that data is currently on?
Answer: N/A

48. Section 1.2.B.7
- Do you have a preferred process for calculating ROI?
Answer: No

49. Section 1.2.1.C (Number Paragraph "The new system…" as "1")
- Are in-use processes and best practices documented and managed by a PMO?
Answer: Not yet

- What Maturity Model is in use and/or planned future use?
Answer: Undetermined

- Will the contractor be responsible for conducting Business Process Improvement initiatives?
Answer: No

50. Section 1.2.2.C (Numbering of the paragraph starting "Proposed solutions…" as "2")
- Can you provide a listing of current Operating Systems
Answer: Yes, Windows 7, Windows 10, Unix, Linux, and IOS.

- Being a browser based solution, what versions of the following software will need to be supported & deployed on the Windows 2000 OS:

- Internet Browser?
- Project Professional

Answer: The solution should be browser agnostic. The vendor should make a recommendation for the version of Project Professional.

56. Section 1.2.2.f.8
- Please provide details about the laserfiche system in use.

Answer: www.laserfiche.com (Rio 10.2)

- Is this system a COTS (Customized off the shelf) solution or a custom developed solution?

Answer: Customized off the shelf

- What database is used in the Laserfiche system?

Answer: SQL

- Will data need to pass bi-directionally?

Answer: No

57. Section 1.3.a
- Does HCC have training facilities? If so, what is included in the facility setup, i.e. computers which require licensed copies of the software, projectors, etc.

Answer: Yes, as a higher education institution, all of the above are available

- How many & what type of trainees will receive training (team member, project manager, program manager, resource manager, executive, admin)?

Answer: Power users should be trained and a train-the-trainer conducted.

- How many training sessions per user will be considered sufficient?

Answer: The vendor should provide a recommendation for this. The number of training sessions is dependent on the knowledge and skills to be taught and the time to become proficient for each skill.

- How will non-compliant trainees be handled (i.e. trainees that will not attend or consume training opportunities?

Answer: The institution will handle non-compliant trainees.

- Will training scope only include the PPM Solution, or will it require additional training of associated systems? I.E. Will training of Microsoft Project Professional be required for Project Managers and Schedule Owners; or Will Office365 training be required for all users?

Answer: The training scope will include only the PPM solution.

58. Section 1.4.4
- What are the existing systems and databases that will require import/export?

Answer: None

59. Section 1.4.5
    - Please qualify the expectation of "data completeness". Is this expectation to have every data entry element inspected, or are there particular examples that should be avoided?
    Answer: Vendor should make a best practice recommendation for a higher education institution.

60. Section 1.4.b.1
    - Is the system expected to be capable of supporting 2400 users, or is the expectation that you currently have 2400 users that may or may not use this product?
    Answer: The latter is true.

    - How soon will PPM tool usage be anticipated to escalate? Will all 2400 users require support at completion of deployment?
    Answer: No, escalation will occur over a 3-year period.

    - Please provide a quantity breakdown of user types (Team Member, Project Manager, Schedule Owner, Resource Manager, Portfolio Manager, Executive, Administrator, etc.)
    Answer:
      • Internal PM, SO, RM: <200
      • Internal power users: ~25
      • Internal lite users/task oriented users (Team members): Varies but could be as many as 1,000
      • External users: Number of vendors/contractors varies
      • Internal view only users (Executive, Administrator): <50

61. Section 1.4.b.4
    - Please explain the expectation of an "audit trail". What elements should be audited and on what frequency?
    Answer: Audit changes made from a project perspective; HCC is relying on your expertise to make a reasonable recommendation

62. Section 1.4.c.8
    - Please define "gaming".
    Answer: Gaming refers to manipulating the system.

63. Section 1.4.f.5
    - Do you currently maintain a detailed account of each resource (including hourly rate) to track costs?
    Answer: No

64. Section 1.4.f.6
    - Do you currently use Project Specific Gating processes and milestones in your PMO Practice?
    Answer: No

    - Will that process require Improvement, or is it considered mature and stable?
    Answer: N/A

65. Section 1.4.j.3
   - Do you currently maintain a list of skill sets for each resource?
   Answer: Yes

   - Is that resource skill set database managed by a resource currently?
   Answer: Yes

   - Will you expect this contract to support the maintenance of a Resource Repository database?
   Answer: No

66. Section 1.4.I.1
   - Will custom configuration expectations include coded solutions, such as custom developed CSS, Custom created images, etc.
   Answer: No

   - Will the use of "out of the box" customizations without coded solutions be compliant?
   Answer: This is a vendor decision but it is possible.

67. Section 2.4
   - Will dedicated staff be expected to be onsite?
   Answer: No

   - Will Dedicated staff be expected to conduct training?
   Answer: Yes, for power users and the train-the-trainer session/s.

68. What was the motivating factor for issuing this RFP?
   Answer: Need for a district-wide project/portfolio management off-the-shelf application

69. Your project timeline states a Board Recommendation and Approval in October/November of this year. What is your Go-Live target and what is driving the urgency around that date?
   Answer: The Go-Live target date has not been finalized.

70. The RFP states that the solution must "accommodate a large range of internal and external users (more than 20, less than 2,400)". Can you please confirm your quantity of Full Users and Time Tracking Users for the purposes of pricing and volume discounts?
   Answer:

   - Internal FT users: <200
   - Internal power users: ~25
   - Internal lite users/task oriented users: Varies but could be as many as 1,000
   - External users: Number of vendors/contractors varies
   - Internal view only users: <50

71. The highest rated proposers will be invited to make an oral presentation of their written proposal to the committee. Is Houston Community College open for an in-person meeting/demo?
   Answer: HCC reserves the right to schedule oral presentations which may include working product demonstrations with those firms that may be within the competitive range following the initial scoring process.

72. Is prioritization of the project portfolio and annual or quarterly roadmap planning of importance? If so, what is that current process like and what requirements are most important to Houston Community College?
    Answer: Project portfolio prioritization will be conducted at least annually. The process is in the definition stage.

73. Is there a need for a collaborative workspace to execute and communicate on project/task-level work between departments?
    Answer: No, additional tools are not needed.

74. Are you more focused on a Top Down portfolio approach or Bottoms up execution approach?
    Answer: HCC needs a balanced approach.

75. Is the Application Portfolio Management of importance? Is there a need to categorize applications and KTLO work that resources are assigned to?
    Answer: Application portfolio management is of importance. The application should address resource allocation but management of such by the vendor is not needed.

76. Is there any integration to other systems that are of interest (that are not listed in RFP)?
    Answer: No

    a. Do you have an intake and prioritization process in place? If so, what does it currently look like?
       Answer: The prioritization process is under development. The intake process has been drafted but not yet approved.

77. Do they have any SharePoint licenses, if yes online or on premise? How many user licenses?
    Answer: Yes, with unlimited users both online and on premise.

78. Is there any reservation on using Microsoft project online? If HCC has Microsoft project online, which version?
    Answer: HCC does have MP online (Office 365 Pro E3).

79. Does HCC have office 365 plan? If yes which version?
    Answer: Yes, Office 365 Pro E3

80. Where is the completed Functionality Response document to be included? (document labeled as "176801_Functionality Response" – document found under the link:
    http://www.hccs.edu/district/departments/procurement/rfps/bid-title-266330-en.html)
    Answer: The functionality response document shall be inserted under Section 4.4.e.i (Tab 3 – page 15 of 38).

81. Pg. 3 – Project Overview: Is there a targeted go-live implementation date for this solution?
    Answer: The Go-Live target date has not been finalized.

82. Pg. 3 – Project Overview: Is this implementation targeted as a multi-phase or single-phase implementation?
Answer: The vendor should propose a solution for this based on best practice.

83. Pg. 3 – Project Overview: Are there a minimum set number of hours associated with the two one-year renewal periods?
Answer: No, the expectation is that the vendor will provide license renewal plus support for the renewal periods. HCC prefers a set fee for yearly support.

84. Pg. 3 – Scope of Services (new system must meet the following requirements):
a. What are the major challenges to current processes?
Answer: The lack of standardized processes and tools is a definite impediment to effectiveness and efficiency.

b. What legacy tools are in used to currently perform some or all of these requirements now?
Answer: HCC has a number of disparate applications being used such as Smartsheet, Microsoft Project, Jira, etc.

85. Pg. 3 – Scope of Services: As a browser-based cloud solution, are there defined internal system implementation processes this project will be required adhere to? (e.g., COTS implementation system deployment SDLC, change control gates, etc.)
Answer: SDLC

86. Pg. 3 – Scope of Services: As a browser-based cloud solution, is there any internal system implementation and/or configuration documentation the vendor will be required to support? (e.g., Business Requirements Documentation or Architecture Design Documentation)
Answer: No

87. Pg. 3 – Scope of Services: Is more than one instance required for this Implementation (e.g., TEST and PROD)? If multiple environments are contemplated, how are these anticipated to be used and maintained?
Answer: Please refer to the answer for Question 37.

88. Pg. 3 – Scope of Services, Section f: - Integration with HCC third-party applications: Does the organization have Office 365 deployed? Has single sign-on been configured with Office 365?
Answer: Please refer to the answer for Question 83.
a. No

89. Pg. 3 – Scope of Services, Section f: – Provides interface or API to integrate HCC third-party applications such as:
- Basecamp (Optional)
- CISCO Jabber (Optional)
- CISCO UBIETY (Optional)
- Dropbox (Optional)
- Google drive (Optional)
- GoTo Meeting (Optional)

- Jira (Optional)
- Laserfiche
- Microsoft Active Directory (Identity Management)
- Microsoft 365
- Microsoft Project
- Smartsheet (Optional)
- Skype (Optional)
- Tableau (Optional)
- TracDat (Optional)
- WebEx (Optional)

a. Is any integration expected to be two- way? No
b. Are there examples available of data expected to be exchanged between systems referenced above? N/A

90. Pg. 4 – Scope of Services, 3. Training and User Support: Regarding training materials - Which roles will require training materials? (typical examples include: System Administrators, Portfolio Managers, Project Managers, Resource Managers, and Team Members)
Answer: Power users and train-the-trainer individuals will require training. Please refer to Question 38 for numbers of users.

91. Pg. 4 – Scope of Services, 3. Training and User Support: Regarding training delivery -
a. How many users of each type / role will there be (for use in estimating the number of training classes required)? Potential type / roles
   i. Team members
   ii. Resource managers
   iii. Project manager's / program managers
   iv. Portfolio managers
   v. Executives / reports
Answer: Power users and train-the-trainer individuals will require training. Please refer to Question 38 for numbers of users.

b. How many training sessions/workshops are envisioned for each group?
Answer: The vendor should offer a number based on their proposed solution.

92. Pg. 4 – Functional Requirements, Data Management, Item 3: What is the annual budget of portfolio of the projects to be managed by this solution?
Answer: N/A

93. Pg. 4 – Functional Requirements, Data Management, Item 7:
a. What appended document types are anticipated?

   Known existing file formats include: Microsoft Office files, Visio, Adobe pdf, Cad drawings, and other graphical formats.

b. Is there a document repository tool or application in use today that facilitates keyword search within posted/appended documents?

Answer: Yes, Laserfische and SharePoint

94. Pg. 4 – Security/User Management: Is there information available regarding the types and anticipated number of system users?

  a. How many portfolio managers are anticipated?
  b. How many resource managers are anticipated?
  c. How many project managers are anticipated?
  d. How many general (team member) users are anticipated?

Answer: Please refer to the answer for Question 9.

95. Pg. 5 Project Request Intake and Evaluation:
  a. Is there a defined project request intake governance process/workflow in place?

  The intake process has been drafted but not yet approved.

  b. Can a diagram or flowchart or written description of the current governance process/workflow be provided to assess level of complexity and scope of Request Intake and Evaluation?

Answer: This is not yet available.

96.   Pg. 5 Project Request Intake and Evaluation: item 4. – Are there examples of how NPR, IRR and payback period are currently handled? (e.g., how is this data captured and reported in today's processes)
Answer: No

97. Pg. 6 – Workflow Management: Item 3. create unique workflows per division, department, etc.
  a. Is there a business level outline of the number of unique workflows per division, department? No
  b. Is there workflow documentation available for review to better assess size and scope? No

98.   Pg. 6 – Workflow Management: Item 7. Provide meeting schedule with automated invites – how is this accommodated in the current environment?
Answer: Office 365

99. Pg. 6 – Project Monitoring/Status Reporting: Are there examples of current reports available for review to better assess size and scope of current reporting?
Answer: HCC will use whatever templates are provided by the vendor.

100. Pg. 7 – Resource Management: Item 4 – Is this requirement looking for "rule-based routing based on change in availability", or reporting that indicates availability (projections)? Are there examples of rule-based routing that can be provided?
Answer: HCC does not use automated assignments.

101. Pg. 7 – Resource Management: Item 9 – Will resources be searching projects and selecting assignments?
Answer: No

102. Pg. 9 – Section 2 Price Proposal, Implementation Cost Breakdown: Is the vendor required to create training materials and conduct training customized to client processes/environment, or is training to be standard (focusing on how to use Project Online functionality)?
Answer: Standard training is fine.

103. Pg. 9 – Section 2 Price Proposal, Implementation Cost Breakdown: Will vendor be expected to load any completed projects into system? If so, how many? Is there any other legacy system data the vendor is required to load?
Answer: No legacy data will be migrated.

104. Pg. 9 – Section 2 Price Proposal, Price Evaluation: Project Made Easy is certified as a small business under Small Business Administration. Does this designation count towards Available Points? (pg. 21 Section 14)
Answer: As noted in Section 5.14 – Small Business Development Program (page 20 of 38), HCC recognizes certification by the following governmental and private agencies: Metropolitan Transit Authority of Harris County (METRO) SBE Certification, City of Houston SBE, MWPDBE and DBE Certifications, Texas Department of Transportation SBE Certification, City of Austin SBE Certification, South Central Texas Regional Certification Agency SBE Certification, Small Business Administration 8(a). HCC has the right to revoke acceptance of a business as a certified or qualifying small business and to conduct certification reviews.

105.   Pg. 9 – Section 2 Price Proposal, Dedicated Staffing:
a.   Are vendor provider resources allowed to perform work remotely? Yes
b.   If work can be performed remotely, are there a minimum number of on on-site visits required/desired? No

106.   Pg. 9 – Section 2 Price Proposal, Option To Renew (OTR) Terms: Are there a minimum number of hours of monthly/annual support hours required for the OTR periods?
Answer: Please refer to answer for Question 87.

107.   What is the aggregate (dollar value) of project portfolio(s) to be managed?
Answer: Please refer to the answer for Question 96.

108.   Are you asking for an OTS or a customized solution?
Answer: HCC seeks an off-the-shelf solution that has already been developed and meets the most number of our requirements for the best value. We want a vendor that helps us implement the solution and train our power users and train-the-trainers.

REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-68

PROJECT PORTFOLIO MANAGEMENT SOFTWARE

<u>**QUESTIONS AND ANSWERS NO. 3**</u>

Date: August 18, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

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1.   Does HCC have an approved budget for this project? If so, can the budget be shared so vendors have an opportunity to customize a solution to maximize benefits to you while staying within the allocated budget?

     Answer: The Project Portfolio Management Application is a strategic project for the Planning and Institutional Effectiveness Department, it is anticipated that as part of the competitive procurement process and this RFP, that the proposal that best meets the needs of HCC and is determined to provide the best value may be recommended for award. A specific budget is not available, based on the evaluation criteria, there are a maximum of 30 points available for under Price Proposal. Proposers are strongly encouraged to provide their best pricing available.

2.   Are vendors able to obtain the technical document in Excel format? We are unable to convert the PDF document to excel format, which would be helpful.

     Answer: Please know the Functionality Response Document will be provided in Excel, please do not change the document other than filling in the specific cells. Additional – relevant information may be provided under separate cover in support of the Functionality Response Document as needed.

3.   Page 15 (e.i) "Proposer shall respond to all requirements and questions noted in Section 1". Is this referencing the Section 1 on page 3? Reason for the question is there does not seem to be any questions in this section, and a search of the document reveals up to 6 unique Section 1's. Could HCC please clarify the meaning of this statement?

     Answer: Please know the intention of the referenced section is allowing for proposers to respond to the Functionality Response Document and insert under Tab 3.e.i. Although Section 1 does not explicitly ask questions, as noted, please be mindful that in the spirit of the RFP it is important to understand to the extent that the proposed solution may meet the needs of HCC, hence the Functionality Response Document was created to allow proposers to confirm if they provide the functionality, how it is delivered and any special requirements.

4. I was curious about the budget attainment process, whether this is something that already has financial support and executive sponsorship or if it's going to be worked into the planning for next year based on these responses?

    Answer: The Project Portfolio Management Application is a strategic project for the Planning and Institutional Effectiveness Department. The initiative has been approved and has executive sponsorship and is anticipated for the coming fiscal year.

5. Section 1.2.2.f
    -   How will optional components be weighted in the Technical Proposal, and Cost Proposal?
    -   If optional components are included, do you want the cost breakdown for those optional elements separately included? (as in a MOD)

    Answer: All requirements noted in the Section 1 – Scope of Services that the vendor proposes as part of their solution being proposed, shall be evaluated in accordance with Section 3 – Proposal Evaluation. Any criteria in the Scope of Services noted as "optional" that is confirmed by the proposer to be "optional" aspect of their solution shall not be considered in the application of points. The price proposal must be for the entire solution being proposed and may include any items labeled as "optional" if determined by the proposer to be part of their standard solution being proposed. Any other criteria that are confirmed to be "optional" by the proposer shall be listed and priced separately and will not be used in calculating the price score in accordance with the Evaluation Criteria.