

**ADDENDUM ONE**

Project Portfolio Management System (PPMS)

*Note: The following clarifications, changes, additions and deletions to Request for Information 13-2387, hereby become part of the Request for Information. It is essential that all prospective Proposers note the content of the Addendum.*

Q: The user counts in the RFI reflect only Construction Project Management Office (cPMO) user numbers. What are the other departments’ user counts and/or roles?

A:

| Department              | Project Managers Super Users | Data team/ data entry | Executive / Management viewers |
|-------------------------|------------------------------|-----------------------|--------------------------------|
| Communications:         | 25                           | 6                     | 2                              |
| Data Research Center:   | 15                           | 0                     | 1                              |
| Information Services:   | 9                            | 10                    | 2                              |
| Planning:               | 10                           | 20                    | 3                              |
| Financial & Regulatory: | 10                           | 20                    | 1                              |
| Human Resources:        | 6                            | 10                    | 1                              |

Q: Is there an executive sponsor for this PPMS project?

A: Both an executive sponsor and an executive steering committee; in addition to the project team.

Q: For Cost Estimates – How many users will be taking advantage of the new tool?

A: Immediate users are identified on page 5 of the RFI referring to cPMO users. Potential enterprise users are identified in the table above.

Q: Please provide some general information about the scheduling expertise of your cPMO.

A:

- Schedule management techniques:  
Staff understand critical path and GANTT charts. Staff generally do not have to use scheduling techniques such as PERT or network diagrams. A large portion of cPMO work is conducted by contractors who prepare their own schedules.
- Scheduling software:  
Staff generally use MS Project, FastTrack or Excel for scheduling in-house projects. A large portion of cPMO work is conducted by contractors who prepare their own schedules. For these projects, staff prepare high level schedules that track the major phases of the construction project. Staff also use MS Project to look at all their projects in a portfolio view, by major construction phases.

Metro in no way endorses any of the software products mentioned in the RFI.

Q: Can Metro cPMO benefit from offering access to its PPM system to its various contractors?

A: At this point, we are not including this as part of our requirements.

Q: Please provide some general information about your organization's expertise in SharePoint and how it is currently applied in your cPMO.

A:

- Metro is in the early stages of deploying SharePoint as a business tool. We have recently hired a dedicated resource for supporting SharePoint.
- The cPMO is currently not integrated into SharePoint.

Q: Does your organization use Microsoft SharePoint and if so, would this resource be available for use in this application, i.e., document hosting, data views, and notifications?

A: Our organization uses Microsoft SharePoint. This application could be available for use in the application.

Q: How does Metro plan to use SharePoint as a business tool?

A: Metro is just beginning to envision our use of SharePoint as a larger enterprise solution as a collaboration tool. We are early in our implementation.

Metro in no way endorses any of the software products mentioned in the RFI.

Q: Our organization's specialty is Microsoft Project Server (all versions). Is there a specific version we should target for this RFI?

A. We are open to suggestions to any modern version.

Q: What is the enterprise database management system that would likely host the application's data, e.g., Microsoft SQL Server, Oracle, MySQL or other)?

A: Preferred solution: Microsoft SQL.

Q: Does Metro have any relationship with Microsoft for corporate software licensing discounts?

A: Metro does participate in the Microsoft Enterprise Agreement program.

Q: Please confirm that the software you are asking to integrate with is: <http://www.aecsoftware.com/project-management-software/fasttrack-schedule-win/>

A: That is one of several software the staff in the Sustainability Department currently use. Their projects would be monitored by the cPMO.

Metro in no way endorses any of the software products mentioned in the RFI.

Q: Some needs identified in your RFI will require support and decisions from your organization's IT team. Will Metro make those individuals available in a timely manner?

A: We plan to follow a structured project plan and will make the needed resources available as scheduled. These include IT technical resources and resources from the business side.

Q: Does Metro prefer hosted or non-hosted approach? How do you know which way is better – besides cost, what are the other deciding factors?

A: We are open to both solutions and will evaluate the benefits of each.

Q: If we recommend a hosted/cloud solution, will Metro be working with Microsoft to purchase this in the Microsoft cloud or do we need to recommend an approach? (If this is currently undecided, please let us know as well).

A: Currently, Metro has no Microsoft hosting arrangements. Any vendor suggesting a hosted or cloud solution should assume that Metro has no expertise or implementation in place today.

Q: Will Metro be supportive of working with remote resources on our team should you desire to fast-track the configuration of the deployment and training.

A: Yes, however, if there are requirements for direct access to our internal business systems, we will need to develop an acceptable security model.

Q: What are the Metro internal resource availability during the initial engagement for installation and configuration, e.g., dba, network?

- A: Metro would have to work this out in project planning. Metro would look to the vendor for advice on what internal Metro resources should best be utilized.
- Metro does employ a full service IT department, but time and resource allocation would need to be prioritized for this project.

Q: Will Metro require the delivery of the physical media for the procured software, i.e., CD-ROMs?

A: For non-hosted solutions, Metro would accept either physical media or an Internet download source.

Q: What is legal entity name of Metro for purposes of quoting the procured product.

A. Metro.

Q: After initial installation, configuration and training period, will Metro consider Time and Material pricing to cover contingency issues?

A:

- Yes.
- As this is an RFI, we encourage all vendors to clearly describe their proposed pricing structure.
- Metro suggests that any vendor proposing a time and materials pricing, include a schedule of hourly rates by role of consultant.

Q: For future rollout – if you can, please identify the spending information you wish to capture. How do you imagine the spending information is entered into application?

A: We are leaving this choice to each responding bidder.

Q: For future rollout - are the users in other departments participate in cross functional projects?

A: Other departments are participating in this current RFI phase. Future participation will be selected once we select a solution.

Q: Do you have the timeline for project approval?

A: In the best of all cases, a project concept form would be approved by June 30 so that the project could receive funding authorization. Ideally implementation would occur Fall 2013/Winter 2014.

Q: For the start date – Do you have a start date in mind as far as the implementation goes?

A:

- The intent of this Request for Information is to determine the best solution and estimated costs for implementing a PPMS for the cPMO. This information will be used to develop a budget request for FY13-14 (July to June). Ideally, the implementation would occur Fall 2013/Winter 2014.
- While Metro is initially looking to procure a PPMS solution to support its cPMO projects and portfolio, Metro would like to grow more complex project management capabilities into its PPMS over time to accommodate needs of its other departments.
- Upon discovering the “value proposition” of an enterprise solution versus a targeted Construction PMO solution, Metro may assess a phased approach and project plan for enterprise wide purchase and implementation.

Q: Will you consider utilizing a Mutual NDA at this point in the PPM evaluation?

A: As a public agency, our standard procurement process is an open process and we are unable to sign non-disclosure agreements for submissions. Please use this as a gauge of what you feel comfortable submitting to Metro.

Q: The RFI specifies 27 users who require read/write access to the application and another 17 who need read-only access to the data, for a total of 44 users. A quantity discount may be available for purchases with 50 or more minimum purchase. Is a 50-copy procurement a near-term possibility?”

A: Yes.

Q: Does woman-owned or minority-owned business make any difference in your vendor selection process?

A: State of Oregon Minority, Women and Emerging Small Business certification is important to Metro. We take this into account if/when we issue a Request for Proposals and pursue selecting a vendor.

Q: Can we submit our response only via Email or do we also have to additionally submit a physical print copy?

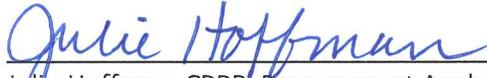
A: Vendors may respond via Email and not include an additional physical print copy.

Q: As the page limit of Appendix D is only 20 pages, can we have pointers in our responses in the Appendix D pointing to the relevant sections in an annexure document containing detailed information about the solution features. Would that be allowed?

A: Yes, but your 20 page submittal should include all relevant parts of your response. Metro RFI reviewers WILL carefully read all 20 pages, but it is optional for them to expand their focus to any additional submitted material.

All other terms and conditions of this solicitation remain the same.

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