SAN ANTONIO WATER SYSTEM PURCHASING DEPARTMENT

Issued By: Gina Cappa   **Date Issued: November 9, 2018**
BID NO.: 18-18113-A

FORMAL INVITATION FOR BEST VALUE BID (BVB)
FOR PROJECT AND PORTFOLIO MANAGEMENT (PPM) TOOL
ADDENDUM 1

Sealed bids, one (1) Original and seven (7) copies, addressed to the Purchasing Department, San Antonio Water System, 2800 US Hwy 281 North, Administration Bldg., 5th Floor, San Antonio, TX 78212 will be received until **3:00 PM, November 19, 2018** and then publicly opened and read aloud for furnishing materials or services as described herein below,

The San Antonio Water System Purchasing Department is willing to assist any bidder(s) in the interpretation of bid provisions or explanation of how bid forms are to be completed. Assistance may be received by visiting the Purchasing Office in the SAWS Main Office, 2800 US Hwy 281 North, San Antonio, TX 78212, or by calling (210) 233-3819.

This invitation includes the following:

Invitation for Best Value Bids   Specifications and General Requirements
Terms and Conditions of Invitation for Bids   Price Schedule

The undersigned, by his/her signature, represents that he/she is authorized to bind the Bidder to fully comply with the Specifications and General Requirements for the amount(s) shown on the accompanying bid sheet(s). By signing below, Bidder has read the entire document and agreed to the terms therein.

Signer's Name: _____   Firm Name: _____
                (Please Print or Type)
                                                     Address: _____

_____
Signature of Person Authorized to Sign Bid   City, State, Zip Code: _____

Email Address: _____   Telephone No.: _____

                                                     Fax No.: _____
Please complete the following:
Prompt Payment Discount: _____% _____days. (If no discount is offered, Net 30 will apply.)

Please check the following blanks which apply to your company:
Ownership of firm (51% or more):
___Non-minority   ____Hispanic   ___African-American   ____Other Minority (specify) _____
___Female Owned ___Handicapped Owned ___Small Business (less than $1 million annual receipts or 100 employees)
Indicate Status: ___Partnership   ___Corporation   ____Sole Proprietorship   ____Other (specify) _____
Tax Identification Number:_____

To report suspected ethics violations impacting the San Antonio Water System, please call 1-800-687-1918.

Revised 08/14/2018

***** This **Addendum 1** is issued for Bid 18-18113-A to do the following:

1. **Provide questions and responses.**

 IT IS NOT NECESSARY TO RETURN THIS ADDENDUM 1 AS PART OF YOUR BID SUBMISSION

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QUESTIONS AND RESPONSES

1. **Can companies from outside the USA apply for this (like, from India or Canada)?**

   Response: Yes.

2. **Do we need to come over there for meetings?**

   Response: Some key meetings will require on premise visits (e.g. kick off, go-live, etc.). SAWS is very comfortable with some meetings being conducted via WebEx. Please define what meetings are on premise and which are remote in your submission.

3. **Can we perform the tasks (related to RFP) outside the USA?**

   Response: Refer to the response for question #2 for on premise requirements. Yes, any work outside of onsite meetings can be done remote outside the USA.

4. **Can we submit the proposals via email?**

   Response: No. Please refer to Section VIII. Best Value Bid Submission Requirements on page 27 of the BVB.

5. **Item 12 in the requirements; do you require a signed and executed contract?**

   Response: No, this is a sample contract for review only. However, any exceptions need to be submitted with the response per Item #13 on the Respondent Questionnaire.

6. **We respectfully request a 2 week extension.**

   Response: Due to time constraints we will not be able to change the bid due date.

7. **Will you accept bids submitted via electronic means (email or other electronic submission), rather than hardcopy?**

   Response: No. Refer to the response for question #4.

8. **You indicate a need to migrate data both to and from the PPM tool and Jira, Trello, and Cherwell. Do you have more details of the frequency and data elements required for those migration tasks? Do you require that the PPM tool be capable of such an interface being developed or that the proposed scope of work include developing the interface?**

   Response: The PPM tool should have APIs that allow this integration. It if does not have it the development of Interfaces will be required. The fields and the elements will need to be determined based on the PPM tool requirements.

Revised 08/14/2018

9. **Does SAWS currently have Office 365 in production or in its plans for deployment to production?**

Response: SAWS does not currently have Office 365, and a timeframe has not been specified to implement it.

10. **Does SAWS currently have Microsoft Power BI in production or in its plans for deployment to production?**

Response: We do not have this.

11. **Are your Project Managers currently using Microsoft Project (Project Standard, Project Professional, and Project Desktop Client)? If yes, which version(s)?**

Response: Some Project Managers use MS Project (various versions).

12. **Does SAWS have an Enterprise Agreement or other purchasing arrangement in place for Microsoft Office 365?**

Response: SAWS has an enterprise agreement with MS. See response on #9 for Office 365.

13. **How many of the 25 licenses in the first year are required to be included in estimated costing for:**

    a. **Project Managers and Resources Managers (create, manage, maintain project schedules)**

    b. **Portfolio Managers – cross-project view of all resource demand and capacity, prioritization of projects, also includes all Project Manager functionality**

    c. **Team Members – view and provide updates on task assignments, access project collaboration sites**

    d. **Business Intelligence users – whether included or not included in the above numbers**

    e. **Application Administrators**

Response: We will need to know more about the tool, access, and functionality. Our best estimate for the 25 licenses is as follows:
    a. 10
    b. 3
    c. 9
    d. Not needed at this time.
    e. 3

14. **How many participants are to be included in the scope of work for training as:**

    a. **Project Managers and Resource Managers**

    b. **Portfolio Managers**

    c. **Business Intelligence users**

    d. **Business Intelligence report/dashboard developers**

    e. **Application Administrators**

Response: Refer to the response for question #13.

15. **How many participants do you anticipate participating in Team Member training? For team members, we typically conduct two-hour workshops which can be effective with larger attendee counts than training classes.**

Response: Around 20.

16. **Do you require that we provide you with softcopy of training materials (including textbooks) or will hardcopy suffice?**

    Response: Hard copy is acceptable.

17. **Do you require that the training materials be customized to your specific configuration of Project Server (understanding that adds additional time and cost)?**

    Response: We would like to discuss this at a later time.

18. **Please provide a process diagram for or detailed description of workflow to be developed in the project scope – or shall an estimate of hours be provided pending detailed requirements gathering?**

    Response: An estimate of hours should be provided pending detailed requirements.

19. **Should our proposed scope include migration of project artifacts (e.g., documents) to the newly deployed environments?**
    a. **If yes, please provide estimated aggregate volume in quantity and size.**
    b. **Will the projects that are migrated all be Microsoft Project "MPP" files or will some/all require conversion from some other format (e.g., Microsoft Excel)?**

    Response: No migration is required.

20. **We are a Registered Education Provider of PMI – will you require Professional Development Units (PDUs) to be provided to training participants?**

    Response: This is not a requirement, but it would be good.

21. **Do you have examples of currently accepted reporting that we should seek to replicate? Are there any aspects of such examples that can be identified for either being retained or removed?**

    Response: Not at this time.

22. **Do you have any existing requirements for post-implementation support that should be included in this bid or should development of a post-implementation support plan that considers the final configuration and capabilities of SCDOR staff be part of project scope?**

    Response: The preference is the latter. Development of a post-implementation support plan that considers the final configuration and capabilities of SCDOR staff should be part of the project scope.

23. **Are you able to extend the deadline for submitting a bid, considering your responses to our questions above and those from other potential bidders that allows two full weeks of work during the coming holiday season?**

    Response: Refer to the response for question #6.

24. **In Section 2, page 20, please provide additional details regarding the approval orders and notifications process requirements. (How are approval requests routed? Are there simple or complex rules which generate approval requests?)**

    Response: This could include the sending of an email when a project initiative has an update or has changed from one status to another status. This could also include a specific criteria or creating an alter on the tool.

25. **Please provide a sample of project rating criteria and how it is scored. (Is it a standard base-10 weighted decision matrix, or is another process used for scoring and assessing? Are criteria always the same or vary by user or project type?)**

Response: The evaluation criteria is defined on Page 15, Section II. Information for Bidder, #6 Evaluation Process.

26. **In Section 3, page 21, please provide additional details regarding the Jira, Trello and Cherwell integrations.**
    a. **Which Jira application is to be integrated?**
    b. **What is the vision for Trello integration?**
    c. **Which Cherwell product(s) require integration?**
    d. **Are these bi-directional or one-way integrations? How many data elements are to be integrated?**
    e. **May we propose enterprise-grade replacements for the above technologies that included with the proposed solution?**

Response: The Jira-Trello applications need to get integrated to import data into the PPM Tool. This is a one direction interface. We are unsure of the data and of the fields that are needed until the PPM Tool is selected. Respondents can propose a solution, yet we are not looking for replacing JIRA-Trello.

27. **In Section 8 on page 21, please provide additional details regarding the desired ERP and CRM systems, as such integrations can be simple or highly complex depending on the depth of integration.**

Response: We are not integrating with the ERP or CRM systems at this time.

28. **Will you accept proposals that are Time and Materials?**

Response: Proposals must meet all of the requirements of the bid.

29. **Would you consider an extension to the bid due date?**

Response: Refer to the response to question #6.

30. **Project Development - Bi-directional integration with agile tools, e.g. Jira, Trello, and possible Cherwell – What are the other systems, and their corresponding database(s) that this system would need to integrate with?**

Response: JIRA and Trello are the only tools that we will be integrating with. No other systems will need integration.

31. **Team Collaboration and Document Management - Use a configurable, project-specific home page to serve as a centralized, real-time source for project team collaboration, document sharing, and project milestone tracking - Do you currently use/leverage Microsoft SharePoint?**

Response: We do not use MS Sharepoint.

32. **Dashboards and Reporting - Allow permission to publish dashboard reports to roles – Can this please be clarified in further detail please? Should users be allowed to only publish reports found on a dashboard? When they publish a report, are they needing to specify what user(s) have access to the created report, and if so, do they only have access to a subset list of users or all users in the system?**

Response: We would like to have some type of role-access that allows users to create reports for themselves and be able to access them. The main dashboards and reports should be coming from the 2-3 people who will be managing the portfolio.

33. **Regarding 2.1 License Grant: Could you please clarify if the intent is for a Perpetual License or SAAS?**

Response: SaaS is preferred, but an option for Perpetual of Onsite may be considered.

34. **Section VIII. 9. lists a Software as a Service Agreement to be included as Attachment G under Tab 9. However, the Solicitation lists Attachment G as "Software as a Service (SaaS) Provider Information Security and Privacy Assessment Questionnaire." Should the questionnaire be submitted under Tab 9? If not, under which Tab should Attachment G be placed? Is there an agreement, besides the sample contract, that needs to be returned?**

Response: The SaaS questionnaire should be submitted under Tab 9. There is not an additional agreement to be returned.

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