



Procurement and Contracting Services

Request for Proposals for a Digital Badging Platform

ADDENDUM #1

**Please mark all proposal submission
Files with the following information**

**Sealed RFP # L192415
Due on June 18, 2024 no later than 2:00 PM, MST**

The following questions were received prior to the close of the Technical Question Period close on June 5, 2024:

- 1. Do you have any insight into the scope of the RFP? Is it only for the existing number of users or is this about bringing more people into one system?**

The RFP is intended to identify one or multiple project management systems that fit University of Arizona (U of A) needs, and to encourage adoption of those systems within the organization (although users will not be barred from using non-awarded systems). Bringing more people into a limited suite of systems, if their budgets and goals are in alignment, would be a desirable outcome.

- 2. Does this RFP include the need for Project Management Software for the UofA Planning Design and Construction (PD&C) group that manages capital construction projects?**

This RFP was written primarily for generalist rather than specialist project management activities at the U of A, however any awarded software system would certainly be an option available to the PD&C group for their projects if the selected system(s) are able to serve their specific needs.

- 3. Can we get a copy of the pre-proposal conference?**

Yes, a recording of the pre-proposal conference can be found at the following link: <https://arizona.box.com/v/L192415PrePro>

- 4. Do you expect the solution to be hosted in your instance?**

The solution must be a commercially available, cloud-based SaaS solution, which would not be hosted in a U of A controlled environment.

- 5. Does the solution have to be one of the Project Management software available in the market? If Yes, is there a preference?**

The University is seeking an off the shelf, cloud-based SaaS project management software solution.

- 6. Can we submit a proposal (BOT Model) to develop a solution with our own ideas and tech design while meeting all requirements? If Yes, can the Round 2 Sandbox be ignored during evaluation?**

The U of A is seeking an off-the-shelf SaaS solution. The Round 2 Sandbox is a required component of the RFP process and cannot be ignored to ensure equality among vendors.

- 7. What are all the tools/software's/systems you expect to integrate with the PM solution?**

(37) Are any integrations required other than those specifically called out in the RFP?

(51) Are there any applications to integrate with Project Management Software?

Users at the University work with a wide variety of third-party tools, and while it may not be possible to provide an exhaustive list, some examples include: Adobe Creative Cloud, Microsoft 365, Google Drive, Peoplesoft, Box, Slack, etc.

- 8. Any limitations on tech stack (Programming Language / Database)?**

U of A is seeking cloud-based SaaS solutions. Primary users of the system(s) would be individuals with limited technical skills who would not be engaging in extensive customization, so there are no significant limitations in that regard. Any interactions/interfaces with our Domain or Active Directory may be limited, and all solutions need to be aware of this constraint.

- 9. Within the 2-5 teams interested in utilizing Project Management Software, can you share what roles those teams play? Examples: Marketing and/or Communications Teams, Technology Teams, Project Management Teams, Grant Teams, etc.**

Some of the different roles are: Project Manager, Enrollment Marketing and Communication; Senior Analyst, Implementation, Infra & Foundational Tech; Senior Manager, Project and Production, Marketing & Brand Management; Assistant Director, News, Communications; Manager, Marketing / Colleges, Campus Brand Engagement; Director, Marketing Technology, Campus Brand Engagement; Project Manager III,

Cancer Center Division; Director, Operations and Organizational Effectiveness, Marketing & Brand Management

- a. **As we provide the case study, are there specific areas of interest we should focus on in addition to basic information about managing multiple sub-clients?**

The committee has nothing to add at this time, although additional areas of interest may arise during the Round 2 sandbox phase.

- b. **Assuming the Marketing and Communications team(s) are part of this group, can you share if your organization is set up as a centralized MarComm department or decentralized with multiple marketing teams serving specific clients? If it is decentralized, can you describe that structure?**

Marketing and communications activities are decentralized at the University of Arizona. There is a central MarCom unit which stewards the master brand, aggregates institutional news stories, sets general branding direction, and engages national and master brand campaigns, but all college and departmental marcom activities are managed by small unit-specific teams.

- c. **Based on the teams utilizing the system, do you feel that some may want to cross-collaborate in the same area/site while others may want a fully siloed area/site?**

Yes, that is an accurate description of what we anticipate.

- 10. Based on the information you provided, there are 2-5 small departments with teams of around 5-10 employees. Would you mind sharing if these teams also collaborate outside those departments and might need Collaborator access for other stakeholders?**

Yes, these teams may collaborate with one another on some projects. If there are options for allowing collaborators to work across U of A project environments without license duplication, that would be useful.

- 11. For the UX Example;**

- a. **Is linking to a Zoom recording within the proposal acceptable?**

Yes.

b. Can you share if there is a recommended length for this video?

The committee will have limited time for review. It would be recommended that a video recording is limited to 10 minutes or fewer.

12. During Round 2, Sandbox, will we be able to provide support and training for the team performing the testing?

Yes.

13. Would you like us to include a copy of the Higher Education Vendor Assessment Toolkit (HECVAT) lite or full version for security review purposes at this time?

Please include a copy of HECVAT lite if available. Note that additional information security documentation may be requested in Round 2.

14. Do you plan to use resource management? Do you track resources top-down (project level) or bottom up?

Yes, U of A plans to use resource management. Project managers take different approaches, and it would be up to the various teams on how they evaluate and track resources (bottom up vs. top down).

15. Will the Enterprise Project Management System need to include project initiation/ demand management as part of the solution?

Demand management functions (including variable ways to initiate projects) comprise part of our overall Business & Workflow Needs and will factor into the evaluation process.

16. Are you looking to capture programs? Program management?

Yes, U of A is looking to capture programs.

17. What individual environments are required? Check all that apply.

a. Development

- b. Test/QA**
- c. Production**

U of A is seeking an off-the-shelf SaaS solution and should not need a development or test/QA environment as the University will not be controlling the system backend. In Round 2, U of A users would seek to test a production environment of the SaaS system to ensure that it meets our specific needs and functions as required.

18. What, if any, documentation is required for the delivery of this project (e.g., configuration summary)?

Currently, no additional documentation is required beyond that which is outlined in the RFP document.

19. Will the proposed solution need to accommodate a time reporting feature? Are you looking for resources to enter timesheets?

Time reporting / timesheets would be a helpful feature but not required. We do not expect awarded solutions to meet 100% of all Business Requirements but would likely to be seeking this functionality in at least one awarded solution.

20. What level of interaction are you anticipating from team members (e.g., are you looking for resources to mark tasks complete / what's remaining)?

Users are interested in allowing people to respond with the devices and circumstances available to them rather than having to log into a system each time. For example, the ability to mark a task as complete in Slack, Teams or Outlook, and to @-mention someone on the team for updates, prompts and notifications.

21. Does your organization have a need to utilize portfolio optimization?

We are interested in portfolio optimization opportunities, if available.

22. Is there any legacy system data considered in scope? If so, please explain.

U of A users will likely be seeking migration strategies from awarded solutions covering how they might transfer current and select past projects from current tools to new tools.

23. Project Made Easy (PME) is an implementation partner for the solution we are proposing. Are you looking for us to complete the company background for our company as the implementation partner, or for the solution's company (or both)?

The University needs to understand the firm profile of any subcontracting entity. If an implementation partnership is being proposed, please complete company background information for both companies.

24. Is there a system/application already in place for which the proposed solution is intended to replace? If so, which ones?

The University of Arizona is a federated organization, and its faculty and staff members currently use a wide variety of project management products and tools. Our goal would be to encourage adoption of a smaller subset of awarded tools to increase collaboration and consistency, although there would be no mandated replacement of current tools.

25. During the past year, has your organization received any product demonstrations? If so, could you provide information on the demonstrated software and the vendors involved?

The University is highly decentralized and there is no definitive record of product demonstrations that have been requested or received by various departments and units within the organization.

26. Do you have any risks to consider for this project that can be shared at this time?

None at this time.

27. Is there an expectation for the vendor to review policies, practices?

Awarded vendors would be expected to comply with University of Arizona procurement and information security policies.

28. What is the target go-live date (if any)?

Based on estimated RFP timing, the University would be aiming to finalize agreements in August or September, and implementation and roll-out of awarded system(s) would depend entirely on a combination of campus interest in and adoption of that system, a system's existing presence with campus users, and typical implementation or migration timelines associated with the specific product.

29. Does your organization support vendor resources to perform work remotely?

The University does have remote workers who will need to use the software to collaborate with on-campus staff. Vendor work would be remote only as the U of A is seeking a SaaS solution.

30. If work can be performed remotely, is there a requirement for on-site visits? Is there a minimum number of required/desired visits?

U of A is seeking SaaS solutions, and assuming these can be configured remotely, there should be no need for on-site visits.

31. Is there a preferred method of training?

- a. **Onsite instructor**
- b. **Virtual instructor**
- c. **Recorded video**
- d. **Self help tools such as user guides or training application**

Virtual instruction, recorded videos and self-help tools would be preferred, but U of A is interested in learning about all potential options.

32. Is it acceptable that training materials are based on a generic environment rather than being specific to your organization? This assumes that the generic environment will still cover all features and functionality that the RFP has listed in its requirements.

Yes, a generic environment for training would be acceptable.

33. Are you interested in assistance with customizing training to include your organization's processes?

Yes, this would be helpful to understand in terms of cost and time commitment.

34. What Training are you interested in?

U of A would like to understand all training options potentially available, including generic training (videos, how-to's) and bespoke training (direct, customized, etc.).

35. Are there any data migrations expected to be in scope for this project? If yes, please provide a summary.

U of A users will likely be seeking migration strategies from awarded solutions covering how they might transfer current and select past projects from current tools to new tools.

36. Project Made Easy (PME) offers services for creating reports to fit your business needs. Will there be a need for reporting to be included in this project? Do you have an estimated number of reports that you will require?

Reporting functions comprise part of our Business & Workflow Needs, and will be evaluated, although we do not expect that all awarded tools will satisfy 100% of all Business & Workflow Needs. The number and type of reports will vary depending on the end user and user department and their projects.

37. Do you plan to utilize workflows to route project requests through from ideation to completion? If yes, will you require more than one workflow?

Yes, we would utilize workflows to capture the project from request to initiation to completion, and yes, we would require more than one workflow.

38. Are the workflow(s) you require already documented (as far as what you would like the system to do)? And if so, could you provide more detail?

Some are documented, but some are developed as the projects evolve. The ability to build workflows would be important to accommodate the diverse uses.

39. Can you confirm the number of users in terms of?

[54] How many total numbers of users who would need to be authenticated for the software access?

- a. Project Managers (who will create projects, have access to financial information, can create different dashboards/reports, capacity planning etc)**
- b. Admin users (to grant/revoke access, access control on reports/dashboards etc)**
- c. Team Members (who will actually work on tasks, and also update tasks/issues/change requests, required for capacity planning)**
- d. View only users**

Although we are unable to provide actual numbers of these types of users on campus due to our decentralized environment, our estimate of the breakdown of users within each sub team is likely to be close to 1% Admin users, 10% Project Managers, 40% Team Members, and 50% View only users.

40. Shall we assume a higher number to estimate? i.e. 5 departments, each department 10 users= 50 Numbers.

For equity, we would recommend estimating based on the low and high end of this scenario, i.e. 2 departments w/ 5 users (10) and 5 departments w/ 10 users (50). Again, this exercise is primarily to form a consistent pricing baseline.

41. Would the users be filling the timesheet through this PPM app? OR Do you wish to integrate the existing timesheet software with new software?

Although some departments may utilize a timesheet feature for the sake of internal billing, this would not be a universally required feature. If existing common timesheet integrations are available, please list them.

42. At any given point in time, what would be the approx number of projects on the portal?

This would depend on the point of time in relation to the roll-out of the recommended products around campus, as well as the adoption of said tools by campus users. If there are limits or pricing implications associated with certain numbers of simultaneous projects, please indicate.

43. Will you be managing Expenses and Billing through the new tool?

No, the University manages its own processes for internal and external expenses and billing, although we are interested in learning more about features within tools that might help to feed these independent processes (e.g. time tracking, financial reporting, etc.).

44. You will need Audit Trail history for - 3 months/1 Year/3 years?

The preferred length of audit trail would be 3 years.

45. Is it mandatory to provide 1 higher education references, can we provide 3 references from other industry clients?

Yes, the RFP does require that at least (1) reference is from a higher education client.

46. What is expected budget for this RFP?

The total available budget is purely an estimate based on past activity and we cannot guarantee accuracy due to the changeability of budgets and campaign focuses. In FY23, the University of Arizona as an aggregate organization spent approximately ~\$330,000 +/- on project management software (estimated based on expenses recorded for FY23 for a selection of leading project management tool brands). These expenses were made in a decentralized manner across the organization on various Software/SaaS solutions based on unit preferences and needs.

47. Can work performed outside USA e.g. Canada?

Technical development work can be performed outside of the United States as long as the individual business units do not have specific information security concerns. Certain data types cannot be hosted outside of the U.S., and it will be crucial for U of A to understand where a bidding vendor's data centers are located and whether data can be isolated to specific regions.

Awarded vendors must also perform background checks on foreign employees or consultants as they would with domestic U.S. employees.

48. How many vendors will be selected from this RFP?

The University will select one or multiple vendors that address a variety of institutional business needs.

49. Which Project Management tool university is currently using?

(55) Which software or tool are we currently using for project management?

The University is a federated environment, and many project management tools are currently being used across the enterprise in a decentralized manner. **There is no formal record of all tools used across the institution.**

50. What is the preference on-premise/SaaS software of the University?

The University is only seeking SaaS software solutions.

51. What is the expected storage you need for pricing?

Expected storage will vary based on roll-out/adoption of tools on campus, as well as the needs of those specific users (e.g. some users may have high storage needs for video or design projects). If there are limits or pricing implications associated with various storage needs, please indicate in the pricing response.

52. Is there a preferred engagement model (options below) in which we are expecting this implementation to be delivered? This will help us to provide the cost efficiently.

- a. Fully onsite model (Most expensive)**
- b. Fully remote onshore model**
- c. Blended/Mix of offshore + onshore.**

**d. Fully remote offshore model with overlapping US working hours
(Least expensive)**

Options B or C would be generally preferred.

53. There is standard post implementation support that comes with the project management software license. Is that support enough for the University OR do we need dedicated manpower support post implementation?

The University is interested in learning about all available support options, both the standard post-implementation support (and what that entails) and any extended or add-on support options available (and associated approximate costs).

54. Shall we also consider the license cost while calculating the annual maintenance cost?

In the Pricing Details section, the maintenance cost (if applicable) can be calculated separately from the license cost, unless these are integrated, in which case please indicate that. For the pricing scenario use case, please include if relevant and if maintenance will be a consistent annual cost.

55. What are the implementation timelines of the project? (if not mentioned)

Implementation timelines would likely be product-specific and based on a combination of whether there are current campus users of the product and interested users looking to migrate to the product.

56. LEGAL WORKER CERTIFICATION - The certification forms seem N/A to SaaS procurement, so would be good to get further insight into your reasoning on these and if these are necessary.

All attached certifications are required. The University requires the Legal Workers Certification for services that will exceed 100k. This has been interpreted to mean that it is required for Software as a Service as well.

57. Is it possible to estimate the total scope of the project to lay out pricing tiers and options vs. just quoting on the given pricing use case scenario?

The pricing use case lays out a likely introductory scenario for a sample U of A department adopting a software solution. If the vendor wants to propose additional pricing information, this would be useful, but we do need a response to the pricing use case as proposed in order to evaluate vendor responses as consistently as possible. If assumptions need to be made, there is no issue with that, but please note them.

58. Terms and Conditions - while you are existing customers, you do outline that the end agreement will be based on and/or incorporate their terms. How does that work if we already have a MSA in place as a lot of time has gone into that process between both parties?

If awarded, the University would expect that current licenses be moved to an overall MSA.

End of addendum, all else remains the same.