



**ADDENDUM #1**  
**Information Technology**  
**Information Technology Project Portfolio Management Platform**  
**RFP # 7475-23**

June 9, 2023

The attached addendum supersedes the original Information and Specifications regarding RFP # 7475-23 where it adds to, deletes from, clarifies or otherwise modifies. All other conditions and any previous addendums shall remain unchanged.

**Please note: BIDS will only be accepted electronically by emailing [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org).**

1. Question: Please confirm this RFP is targeting Project Management software for IT projects only. It would NOT encompass Project Management needs for capital program/projects such as facilities, roadways, water systems and other infrastructure construction efforts within the County.

**ANSWER: This RFP targets Project Portfolio Management software to support IT projects but also one that has the ability to maintain and differentiate project portfolios of different types (See Attachment A, Line 6) and collect status/progress of any project type.**

2. Question: Does the County require the solution to meet Section 508 web accessibility requirements?

**ANSWER: Yes.**

3. Question: There are no requirements that speak to decision-making. Does the County intend to use the system to build consensus on selecting projects for inclusion into the budget or does it expect to make project selection decisions outside the system?

**ANSWER: Yes, if a decision matrix tree could be configured, this would be nice to have in a PPM; however, it is not a requirement of a PPM system for us. We can continue making project selection decisions outside the system if it is not included in the PPM System.**

4. Question: Attachment A has a requirement as follows: "Business cases can be scored by non-licensed users"? Can you elaborate on why the County is requesting non-licensed users? In most cases, vendor need to protect their intellectual property (IP) through a license agreement or a managed service agreement. It's not clear why the County desires that some users would not be a party to the agreement.

**ANSWER: For Boulder County, we are using the term non-licensed user to refer to business stakeholders who do not have full access to the system. These users would still be Boulder County employees and would be held to any agreements made between the selected vendor and Boulder County.**

5. Question: Does the County have a target implementation timeline?

**ANSWER: See Question #14.**

6. Question: Does the County have a set budget for year 1, to include the PPM platform and implementation services? If so, can it be shared?

**ANSWER: Year 1 budget has not been set as this RFP is exploration for a potential budget request. The approved budget amount cannot be shared once defined.**

7. Question: The RFP states: "Able to integrate with other software/systems including but not limited to Oracle ERP, Office365, DocuSign, FileNet, and UKG Dimensions.", and the requirements include "Able to create/use bi-directional APIs to integrate with other systems." Can you elaborate on your integration requirements by system to assist with estimating the level of effort required?

**ANSWER: This is still a discovery project and the level of detail for this question has not yet been identified. We use Oracle for project financials, O365 for Teams and Outlook and various other programs, Docusign for routing documents and UKG for timekeeping.**

8. Question: Is the County requesting a firm-fixed price or labor hour proposal for the implementation services?

**ANSWER: Firm-fixed price.**

9. Question: We are humbly requesting an extension of the deadline for questions to be submitted as well as a potential extension of the submission deadline

**ANSWER: Extensions for this RFP will not be permitted at this time. RFP Questions remain due on June 2, 2023, and Submittals are due on June 20, 2023.**

10. Question: From a level of engagement perspective for your ServiceNow technical team, would you rather leverage a or b below?
- a. An implementation where all the configuration is done by the vendor and then the vendor documents what was done and provides a formal handoff to the client ServiceNow admin team so that they can support in the future post go-live.
  - b. An implementation where your ServiceNow admin resources are actively involved in the ServiceNow project configuration working with the vendor implementation team to provide direction and coaching, and auditing of their work. This typically required at least 75% of a ServiceNow Admin resource during the implementation timeline but provides on the job training and experience.

**ANSWER: We would prefer an implementation where vendor admin resources are actively involved throughout the implementation and knowledge transfer to Boulder County employees/admin is provided.**

11. Question: What systems used today are expected to be integrated with ServiceNow beyond Azure AD?

**ANSWER: See Attachment A, Line 41.**

12. Question: What discovery tools are used today and, in the future, to populate the CMDB ( Licensing, asset data, ITOM service craft connectors)

**ANSWER: We do not currently use discovery tools or a CMDB for PPM.**

13. Question: Is a phased approach in consideration for implementation and if so, is there a “must have” list of capabilities for Phase 1?

**ANSWER: No.**

14. Question: Upon finalization of the contracts, when will the work ideally begin? When is the work to be completed and potential Go Live Date?

**ANSWER: The schedule has not been set as this RFP is exploration for a potential PPM. If we move forward with a new PPM, after contracting, we**

**would ideally begin work in Q2 of 2024, with a potential go live date Q4 2024 and project completion in Q1 or Q2 2025.**

15. Question: Will a demonstration or Proof of Concept be needed after the submission of RFP?

**ANSWER: See RFP, page 14.**

16. Question: For PPM Tool and solution to be implemented, how many user should be considered as per following breakup:

- a. Number of Administrators of the Solution (Having full access) ?
- b. Number of Administrators of the Solution (Having limited access to some specific parts of the system for maintenance purposes) ?
- c. Number of Business Users that will manage the data with system and do planning ?
- d. Number of Business Users that will use the application in read only mode for supervision, analytics or reporting activities ?

**ANSWER:**

**a & b. We would not split these duties. There would be 2 administrators.**

**c. Between 440-460 – This is an estimate as it would likely depend on the system features for the users that would be updating data in the system.**

**d. - Between 40-60 – This is an estimate as it would likely depend on the system features for the users that would be reviewing data in the system.**

17. Question: How many portfolios are to be supported by the PPM solution over a period of time say per year and concurrently?

**ANSWER: Two at minimum with a potential for up to 30 portfolios. See also Question #1.**

18. Question: How many projects in total and by portfolios should be considered in a year?

**ANSWER: Currently 125 projects split between two IT portfolios. Our portfolio continues to grow and we expect the potential for 500+ projects throughout Boulder County.**

19. Question: How many projects or ideas are collected through the project intake process in a given month & year? And what % of such projects/ideas make it to execution?

**ANSWER: We average 55 projects per year for intake. We accept between 75-100% of the projects proposed.**

20. Question: Are the IT-PMO resources using the applications collocated or will be using from different locations?

**ANSWER: The IT-PMO team is located within Colorado; however, we all work from different locations within Colorado. Occasionally, members of the team work from locations outside of Colorado.**

21. Question: Is vendor expected to factor price of cloud or existing cloud will be utilized for PPM solution implementation.

**ANSWER: Cloud costs should be factored into the cost. There is not an existing cloud.**

22. Question: Is there a preferred cloud provider vendor should consider?

**ANSWER: Azure is the cloud provider the County uses for self-hosting.**

23. Question: Please help with the percentage breakup of Agile & Waterfall methodologies used for projects?

**ANSWER: Projects primarily use waterfall; however, we also have some teams that use agile. There is a possibility for more teams to move toward agile project management in the future.**

24. Question: Will the users of the PPM solution be using the applications from remote sites?

**ANSWER: Yes.**

25. Question: Is there expectation to report the work/task progress on real-time basis?

**ANSWER: Yes.**

26. Question: Does implementation of the PPM Solution require any data migration from existing systems? If yes, then please advise the technology/platform or data sources which will be part of migration.

**ANSWER: Data migration is not part of requirements. If we can do CSV imports, we can manage any data migration on our own that might be needed.**

27. Question: Please elaborate the integration requirements with other systems or platforms and the nature of integration e.g. batch process or real-time.

**ANSWER: See Question #7.**

28. Question: Could you confirm the number of PPM Fulfillers across all processes (Demands, Projects, Budgeting etc.).

**ANSWER: See Question #16c.**

29. Question: Will Boulder County be looking to import their in-flight projects and financials into the new PPM platform? If so, how is this data currently stored/handled?

**ANSWER: See Question #26.**

30. Question: Does Boulder County expect Organizational Change Management as well as PPM Fulfiller training as part of this PPM platform implementation?

**ANSWER: Yes.**

31. Question: Are you using any reporting tools today? E.g. PowerBI, or Custom tool?

**ANSWER: Yes. We leverage tools in the Microsoft suite for PPM reporting.**

32. Question: Could you please elaborate in which ways you want to 'look back' in historical reports?

**ANSWER: The PMO requires a PPM with the ability to output historical reports related to project/portfolio performance (financial, schedule, resource load, etc) over specified periods of time.**

33. Question: Question 42 mentions the scoring of business cases by non-licensed users - could you please elaborate on the use-case around this requirement? Who would be doing the scoring as an external party? How many people would need access to the business cases to perform this process? Are these individuals internal or external individuals to the County of Boulder?

**ANSWER: See Question #4.**

34. Question: Regarding question 2, it mentions the ability to toggle projects on and off "Hold Status" - in this functionality how does Boulder County see the project and associated objects behaving? We understand that the desired behavior may

not be completely known at this point, but any clarity on the requirement would be helpful in our explanation.

- a. For example, when a project is on hold - does the start and end date remain fixed or would the dates float through time during the on-hold period? In terms of resource assignment and capacity - would the resource assignments remain on the project and would the capacity assigned to on-hold projects be reported on as the resource availability? For governance purposes, when the project is "Hold Status" - what project attributes are editable versus locked? These attributes could include the WBS, timelines, financials, associated resources, scope, and other details.

**ANSWER: We are open to all possibilities; however, the ideal solution would include when a project is on hold, the majority of the fields would be locked down except a "notes" field and the project end date. Any changes made to notes or the project end date would be tracked for historical reference. When the project is toggled to in-progress, the project dates, etc would be adjusted as necessary. It is desired that resources and capacity for on-hold projects could be reported as available but still tied to the project, as maybe in a "tentative" availability.**

35. Question: Question 7 references reoccurring/resubmitted/follow-up projects - the 3 different instances are quite unique by nature. We understand that the desired behavior may not be completely known at this point, but any clarity on the requirement would be helpful in our explanation.

**ANSWER: We have projects that re-occur, in the sense that they are just continual updates made for improvements to systems. We also have projects that are re-requested, because they were not approved in previous years for funding or due to a lack of capacity, so they continue to be requested until they get approved and can be worked on. Then, we also have projects that can be follow ups, as an example, this RFP is being released with a Discovery project, and a follow-up to the discovery project has been submitted to request the funding and approval for the implementation of a PPM system. We would like to be able to track these to see how frequently things are followed up on, re-requested, or continually have updates requested to determine better process improvement.**

36. Question: For the reoccurring projects could you provide an example instance where this would be the case at Boulder County?

**ANSWER: See question #35. Several projects require enhancements or upgrades, or just occur yearly. An example is the elections updates and fixes to technology needs for the annual elections.**

37. Question: For the resubmitted projects, does the County see this as projects that were in-progress but decommissioned and archived? Or rather denied approval when submitted and sent back to draft? For the potential scenario where the project was decommissioned - what is the ideal interaction between the original project and the newly submitted project? Can the project remain as the same object, but simply reverted back to draft stage? Or does the requirement infer that there is a snapshot of the original project and an association to the new submission?

**ANSWER: Resubmitted projects would be both scenarios described. For a decommissioned project, we do not have further information at this time on what the ideal interaction would be. We would like decommissioned projects to be saved for historical reference that, if not re-used from a draft status, it could be linked to future (potentially accepted) projects to see the changes over time.**

38. Question: Finally, for the follow-up projects what is the desired association between project A and project B? Examples of this could be a link in the project description, reference in the project title, or is this seen as a nested project? Please explain the extent of requirement described by these different project scenarios.

**ANSWER: We currently don't have a preference, we just need some way to know that the projects are linked and can view the information from original historical projects that caused the need for the follow up project.**

39. Question: For question 31 - "Gantt charts have version control" - By version control, is this meant as the ability to compare multiple versions of a project schedule against one another? Or saved versions to revert back to?

**ANSWER: Both.**

40. Question: Which components of PPM (Project Portfolio, Demand, Resource, Agile, etc)? (Attachment A – Row 2)

**ANSWER: Project Portfolio.**

41. Question: How many and what type of users will there be for PPM? (Attachment A – Row 10)

**ANSWER: See Question #16.**



42. Question: What type of dashboards will be required? How many and who will be viewing? (Attachment A – Row 29)

**ANSWER: We request tabular and real-time drillable dashboards. Requested dashboards include various graphical reports, charts and views as well as a range of key performance indicators to help track and measure project health, project progress, budget information, resources. Reporting needs include but are not limited to: Granular detail on project status, weekly project health view, Portfolio deep dive for monthly reporting, and project roadmap views. Users who will view/use/run the reports would be all project members of the PPM, and there will be high-level visibility for County leadership.**

43. Question: What are the requirements for integrations with the proposed solution? (Attachment A – Row 37)

**ANSWER: See RFP, page 6.**

44. Question: What type of notifications will be required? Who will receive them? (Attachment A – Row 38)

**ANSWER: Required notifications include user-driven notifications such as deadline reminders, assigned tasks, project updates via push notifications and email reminders (integration with O365). Any project member would be a recipient of O365 notifications (internal and external to Boulder County).**

45. Question: If our solution is a custom application that can be hosted on a PAAS or IAAS environment. Will it be accepted or our proposal will be disqualified based on your request on having a SAAS solution only? i.e. Can we propose a tailored solution and providing hosting services for it on Cloud PAAS/IAAS?

**ANSWER: Our preference is a SaaS solution; however, cloud PAAS/IAAS solution proposals will be accepted.**

46. Question: Is there any preference in technology of the PPM solution? MS Project Online, MS Project for the web, other.. Any preferences in hosting services providers, when needed?

**ANSWER: No, there is no preference in the technology of the PPM solution or on the hosting service provider.**

47. Question: Can we propose a solution based on MS Project for the web?

**ANSWER: Yes.**

48. Question: Would you please mention how many portfolios and programs exist?

**ANSWER: See Question #1 and #17.**

49. Question: How many project types are available in terms of different projects details and pre-defined schedule templates?

**ANSWER: Between 7-15 project types are available with the potential for more; however, the number of schedule templates is currently not defined.**

50. Question: As per our understanding, the following business processes automation shall be included:

Main Process Groups:

- a. Initiation
- b. Planning
- c. Execution
- d. Monitoring and Controlling
- e. Closing

Life cycle processes:

- f. Issues
- g. Risks

if there is any additional business process we should consider for automation, please mention it explicitly.

**ANSWER: Additional business processes for automation could include portfolio management and communications. See Attachment A, Lines 2 and 43.**

51. Question: Do you have any specific requirements for project views, Tasks views, and resources views needed? How many views for each aspect is required on average?

**ANSWER: Views would include but not limited to task list, task calendar, and resource information. Also see Question #42.**

52. Question: Would you please clarify approximately how many departments will participate in projects workflows?

**ANSWER: Boulder County consists of 21 departments that engage with IT PMO on projects and will need differing levels of access to participate in project workflows.**

53. Question: Would you please clarify number of steps for each process?

**ANSWER: We have projects that range from 6 steps to 23 steps. Each step could have up to 50 sub-steps, depending on the process.**

54. Question: Would you please mention required list of external systems you need to integrate with?

**ANSWER: See RFP, page 6.**

55. Question: RFP mentioned that the solution should be able to integrate with other software/systems including but not limited to Oracle ERP, Office365, DocuSign, FileNet, and UKG Dimensions. What is the exact number of external systems that we should consider to integrate with? And what are the main objectives /use cases of integration with each of these system? i.e. How many integration points with each system? Is integration for retrieving information (Read Only) or Read & Write from/to external systems?

**ANSWER: See Question #7.**

56. Question: Do you have any around figure for number of required dashboard and reports?

**ANSWER: This number has not been defined as we are still evaluating requirements in this area. Also see Question #42.**

57. Question: Would you please clarify target audience of the required reports and dashboards i.e. top management, external users and PMO members?

**ANSWER: Target audience includes project managers, business analysts, top management such as elected officials, middle managers, project team members.**

58. Question: For Reports and Dashboards, can we propose our solution based on MS Power BI, and you have other preference?

**ANSWER: Yes, you can propose a solution based on MS Power BI.**

59. Question: Are there any old data which need to be migrated? If yes, please specify the sources of data, types and size of data to be migrated.

**ANSWER: See Question #26.**

60. Question: Attachment A - PPM Requirements specifies 500 users to deal with the solution. Is this correct? Who are the systems users/personas? Are they all internal users, or external users can access the PPM system? And what is the expected number of concurrent users for the system (internal users/administrators/external users if any)?

**ANSWER: We prefer concurrent user licenses; however, at this time the number of licenses is unknown. See Question #16.**

61. Question: How system users will be authenticated? Shall we consider integration with Azure Active Directory /Office 365 ?

**ANSWER: Azure Active Directory/SAML Single Sign on will be used for authenticating users. Integration with Azure and Office 365 will be required.**

62. Question: For infrastructure, 2 environments will be provided (staging and production). Is that sufficient or you have different expectations?

**ANSWER: The number of environments is service and/or platform dependent.**

63. Question: We assume that the solution will support English language only. Please confirm.

**ANSWER: English is the primary language of choice, but we prefer systems that provide multi-language capabilities.**

64. Question: We assume that the vendor must provide a bill of material of all SW licenses /subscriptions and hosting services required for the solution including costs of all these licenses and services. Please confirm.

**ANSWER: Yes, vendor must provide all costs with proposal.**

65. Question: Can we consider providing remote/online training and knowledge transfer sessions to IT Department staff? If yes, please advise what are the different types of trainees, and how many trainees expected in each type.

**ANSWER: Yes. Trainees consist of up to 20 project managers, 35 business analysts, up to 460 end users (top management/mid-level managers/sponsors, project requestors, other stakeholders).**

66. Question: Shall we consider any onsite activity, or project can be executed remotely?

**ANSWER: We primarily work from remote locations and the entire project could be conducted remotely but we would consider coming onsite for the following key activities: project kick-off, requirements and design, testing, and production as onsite activities at minimum.**

67. Question: Do you require Post delivery technical support services? If yes, then what Technical support model is preferred/expected? And what is the expected support period after Go-live?

**ANSWER: Post implementation technical support services would be required. The level and model of that support would be determined by service available.**

68. Question: We assume that we can provide remote technical support. Please confirm.

**ANSWER: Yes.**

69. Question: What is the expected Go-live Date for the required PPM solution ?

**ANSWER: See Question #14.**

70. Question: What is the expected project kick-off date and the implementation/development timeline of the required PPM solution?

**ANSWER: See Question #14.**

71. Question: What is the expected contract duration including solution development, deployment, maintenance and support ?

**ANSWER: See Question #14 and #67.**

72. Question: What are the approved/accepted payment models for Boulder County? Lumpsum/ One Time payment, Monthly Subscriptions, annual subscription, other...

**ANSWER: Annual one-time payment is preferred for subscription services. For true up, payment would occur the following year. Milestone payments during implementation phase are preferred based on completion dates.**

**Submittal Instructions:**

Submittals are due at the email box only, listed below, for time and date recording on or before **2:00 p.m. Mountain Time on June 20, 2023.**

**Please note that email responses to this solicitation are limited to a maximum of 50MB capacity.**

**NO ZIP FILES OR LINKS TO EXTERNAL SITES WILL BE ACCEPTED. THIS INCLUDES GOOGLE DOCS AND SIMILAR SITES. ALL SUBMITTALS MUST BE RECEIVED AS AN ATTACHMENT (E.G. PDF, WORD, EXCEL).**

**Electronic submittals must be received in the email box listed below. Submittals sent to any other box will NOT be forwarded or accepted. This email box is only accessed on the due date of your questions or proposals. Please use the Delivery Receipt option to verify receipt of your email. It is the sole responsibility of the proposer to ensure their documents are received before the deadline specified above. Boulder County does not accept responsibility under any circumstance for delayed or failed email or mailed submittals.**

Email [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org); identified as **RFP # 7475-23** in the subject line.

All proposals must be received and time and date recorded at the purchasing email by the above due date and time. Sole responsibility rests with the Offeror to see that their bid is received on time at the stated location(s). Any bid received after due date and time will be returned to the bidder. No exceptions will be made.

The Board of County Commissioners reserve the right to reject any and all bids, to waive any informalities or irregularities therein, and to accept the bid that, in the opinion of the Board, is in the best interest of the Board and of the County of Boulder, State of Colorado.



**RECEIPT OF LETTER  
ACKNOWLEDGMENT**

June 9, 2023

Dear Vendor:

This is an acknowledgment of receipt of Addendum #1 for RFP #7475-23, Information Technology Project Portfolio Management Platform.

In an effort to keep you informed, we would appreciate your acknowledgment of receipt of the preceding addendum. Please sign this acknowledgment and email it back to [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org) as soon as possible. If you have any questions, or problems with transmittal, please call us at 303-441-3525. This is also an acknowledgement that the vendor understands that **BIDS will only be accepted electronically by emailing [purchasing@bouldercounty.org](mailto:purchasing@bouldercounty.org).**

Thank you for your cooperation in this matter. This information is time and date sensitive; an immediate response is requested.

Sincerely,

Boulder County Purchasing

Signed by: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Company \_\_\_\_\_

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