Corporate Finance Department
Materials Management Division

524-2020 ADDENDUM 2

PROJECT PORTFOLIO AND RESOURCE MANAGEMENT SYSTEM

ISSUED: October 13, 2020
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URGENT

PLEASE FORWARD THIS DOCUMENT TO WHOEVER IS IN POSSESSION OF THE REQUEST FOR PROPOSAL

THIS ADDENDUM SHALL BE INCORPORATED INTO THE REQUEST FOR PROPOSAL AND SHALL FORM A PART OF THE CONTRACT DOCUMENTS

Template Version: Ar20160708

Please note the following and attached changes, corrections, additions, deletions, information and/or instructions in connection with the Request for Proposal, and be governed accordingly. Failure to acknowledge receipt of this Addendum in Paragraph 10 of Form A: Proposal may render your Proposal non-responsive.

PART A – PROPOSAL SUBMISSION

Replace: 524-2020_Form N: Non-Mandatory Requirements with 524-2020 Addendum 2 - Form N(R1): Non-Mandatory Requirements.

The following is a summary of changes incorporated in Form N(R1): Non-Mandatory Requirements:

Form N: Task/Project Management: Update Row 4 to read:
Should provide support for both waterfall and agile project management methodologies. (Please describe how your solution supports both methodologies and be prepared to demonstrate). **Note: It is not a requirement to maintain requirements, user stories, or product backlog items in the solution.**

Form N: Task/Project Management: Update Row 5 to read:
Should provide the ability for any team member to add tasks to projects they have been assigned to, regardless of project management approach (agile, waterfall, etc.)

Form N: Project Dashboard: Update Row 15 to read:
Should provide the ability to create/configure multiple project dashboards for a project

Form N: Project Dashboard: Update Row 16 to read:
Should provide the ability to restrict access to dashboards based on role

Form N: Project Dashboard: Add Row 17:
Should provide the ability for a team member to configure their own dashboard, including charts and sorted/filtered views

Form N: Project Dashboard: Update Row 18 to read:
Should provide the ability to add external web content to a dashboard. **For example, embedding a streaming video hosted on the internet.**

Form N: Resource Allocation: Add row 25:
Should provide a mechanism for resources to declare and update their skills as listed in the solution. For example, after a resource has taken training on programming language X, the resource can record in the solution that they now have beginner-level knowledge in programming language X.

Form N: Resource Allocation: Add row 26:
Should provide a mechanism for resource supervisors to validate any skill updates made by the resources that report to them. For example, after a resource has recorded in the solution that they now have beginner-level knowledge in programming language X, the supervisor can validate or approve this change.

Form N: Configurability: Update row 33 to read:
Should provide the ability to make a change to a project template and apply that change automatically to any existing projects created previously with that template

Form N: Integrations: Update row 37 to read:
Should provide the ability to integrate with the project management features of Microsoft Team Foundation Server/DevOps

Form N: Integrations: Update row 38 to read:
Should provide the ability to integrate with project management features of Atlassian JIRA

Form N: Integrations: Add row 39:
Should provide the ability to integrate with source control features of Microsoft Team Foundation Version Control (TFVC)

Form N: Integrations: Add row 40:
Should provide the ability to integrate with source control features of Git

Form N: Integrations: Update row 41 to read:
Should provide the ability to integrate with the testing features of Microsoft Team Foundation Server/DevOps

Form N: Integrations: Add row 42:
Should provide the ability to integrate with the testing features of Atlassian Jira/Xray

Form N: Security: Update row 47 to read:
Should provide the ability for team members to include individuals from different departments. **For example, it should be possible to easily add team members from different departments, groups, or project teams to the same project.**

Page numbering on some forms may be changed as a result.

PART B – BIDDING PROCEDURES

Revise B2.1 to read

B2.1 The Submission Deadline is 12:00 noon Winnipeg time, October 22, 2020.

Add: B11.2.2

B11.2.2 If any of the requested information cannot be disclosed due to NDA or other agreement with subcontractors or clients, the proponent should indicate this in your submission

Replace B11.2 (e) to read:

B11.2(e) project owner (the organization, department, or group for whom the solution was implemented)

Add: B12.1.1

B12.1.1 If multiple plans are proposed, the proponent should include differences in schedule and budget for comparison.

Replace B13.1 to read:

B13.1 Describe your firm's resource management and allocation approach and team organization during the performance of Services. Include any subcontractors who will be involved in performance of Services.

Add: B14.3.1

B14.3.1 Exported data could include projects (including cost data), tasks, resources, users, portfolios, reports, logs, historical data and relationships between these entities (e.g. tasks assigned to resources, or resources assigned to projects).

Replace B14.3 to read:

B14.3 **Data Migration**

Describe the capabilities for migrating data between the solution and external business systems (migrating between testing and production environments, migrating from a previous PPRM tool to the proponent solution, or migrating from the proponent solution to an alternat PPRM solution, for example). Include a description of which data migration operations would require assistance from the proponent, and which operations could be performed by the City. For sizing, you may refer to the alternatives described under B14.9 (d) for guidance.

Replace B14.9 (f) to read:

B14.9(f) Describe any other options you can provide to assist the City in addressing variable service demand. Include any impact these options would have on cost.

Revise B25.1

B25.1 Award of the Contract shall be based on the following evaluation criteria:

(a)	compliance by the Proponent with the requirements of the Request for Proposal or acceptable deviation therefrom:	(pass/fail)
(b)	qualifications of the Proponent and the Subcontractors, if any, pursuant to B19:	(pass/fail).
(c)	Total Bid Price	20%
(d)	Form N: Non-Mandatory Requirements (Section C)	30%
(e)	Experience of Proponent and Subcontractors (Section D)	5%
(f)	Implementation Plan and Project Schedule (Section E)	5%
(g)	Key Personnel and Time Allocation (Section F)	5%
(h)	Technical and Non-Functional Requirements (Section G)	25%
(i)	Record Keeping Functionality (Section H) and	5%
(j)	Value Added / Innovative Services (Section I)	5%

PART D – SUPPLEMENTAL CONDITIONS

Add: D2.7.1

D2.7.1 These funds are applicable to the period defined in D2.1, not including any optional extensions

Add: D17

D17 Background

Add: D17.1

D17.1 The City is seeking a solution for the management of resources, projects and portfolios for the Innovation, Transformation and Technology (ITT) department. The ITT department currently uses a variety of tools for managing of and reporting on projects and resources. These activities include allocating resources, tracking time spent on tasks, reporting on the status of projects (including budgets), and reporting on the status of portfolios of multiple projects. Some of the tools used currently include Microsoft Office, Microsoft Project, SharePoint, Harvest/Forecast, and Microsoft Team Foundation Server. The City is seeking to unify these processes in one solution, for use by the ITT department, to facilitate more consistency, better information sharing, and more efficient management of resources, projects, and project portfolios. The ITT department's need is for a solution which supports approximately 50 projects per year, organized into two portfolios. These include approximately 30 resource managers, 4 project managers, 30 portfolio managers, and 30 team members. This need may increase, as there is the possibility that other groups within the City may be added to the successful candidate.

PART E – SPECIFICATIONS

Replace E3.4 to read:

E3.4 Business Requirements

Feature	Feature Description
Task/ Project Management	Shall provide the ability for project team members to view and/or receive reminders regarding when planned work should begin and end
Task/ Project Management	Shall provide the ability for project team members to indicate what percentage of work has been completed on a task, so that project manager knows if team is on schedule
Task/ Project Management	Shall provide the ability to view project schedule or tasks in a list view and Gantt chart view
Task/ Project Management	Shall provide the ability to view project schedule or tasks in a calendar view
Task/ Project Management	Shall provide the ability to view project schedule or tasks in a Kanban view
Task/ Project Management	Shall provide the ability for project manager to view at a glance which tasks have been completed on time and which tasks are late, so that corrective action can be taken
Task/ Project Management	Shall provide the ability for a team member and project manager to provide comments on tasks (both their own and those of other team members)
Task/ Project Management	Shall provide the ability for project manager or team member to attach documents to tasks, approval requests, intake documents, project portal, or other project artifacts, so that more details about a task can be provided to other team members; shall provide the ability to create a central repository of critical project documents. Documents can include: project communication plan in Word, project initiation document in Word, relevant email messages, project-related documents in Teams, video files of status reports etc.
Task/ Project Management	Shall provide the ability to attach links from project artifacts to documents stored in enterprise document repository e.g. FileNet.

Task/ Project Management	Shall provide the ability to capture project status information such as project phase; overall project status based on status of component health indicators such as schedule status and budget status; and text description of status (for details). • Status update information shall include attachments or links to related documentation for example a link to status update video.
Task/ Project Management	Shall provide issue logs containing issue information such as submitter information, type of issue (e.g. product defects, performance issues), and issue detail information • Issues can be captured by and displayed to external users • Issues can be integrated with workflow, e.g. interested users are automatically notified when an issue belonging to a particular category is created (SEE ALSO Automated Workflows)
Task/ Project Management	Shall provide the ability for project manager to set project milestones and report on whether the project has met its targeted milestones
Task/ Project Management	Shall provide the ability to copy project tasks common to multiple projects from one project to another, OR ability to create a project template for these types of projects, e.g. policy projects
Task/ Project Management	Shall provide the ability to create a program with multiple child projects
Expenses and Costs	Shall provide the ability to calculate and display actual vs planned/ budgeted costs
Expenses and Costs	Shall provide the ability for a Resource or project manager to assign a rate to resources (both internal and external resources) so that he/she can view and report on project costs for user-selected time periods (day, week, month, year, from/to dates, project phase)
Expenses and Costs	Shall provide the ability to capture and report on project costs in pre-defined cost categories such as unit costs, tax, interest; ability to indicate whether costs are tax-exempt and to automatically apply a tax calculation
Expenses and Costs	Shall provide the ability to categorize costs into pre-defined categories such as: Hardware, Software, SaaS, Professional Services, Internal, Other etc.
Expenses and Costs	Shall provide the ability to apply and display calculations to budget and actuals such as: remaining budget; percent spent; percent left; budget variance.
Portfolio Management	Shall provide the ability for business user to submit an intake form describing business needs, so that the area handling project intake requests has the data it needs to begin investigation of the initiative.
Portfolio Management	Shall provide the ability to populate project data automatically from the intake data when a new project is created using the standardized templates. • Only selected information is brought over to the project such as project name, project description etc. • The data from the intake form is saved and when the intake request is approved the information is automatically moved to project data and does not need to be re-entered

Portfolio Management	Shall provide the ability for individuals with appropriate access rights to: • select/ approve what projects will be done and • schedule the projects (assign start date)
Resource allocation	Shall provide built-in resource allocation functionality OR shall integrate with resource allocation management tools, e.g. Meisterplan
Resource allocation	Shall provide the ability for resource managers to see the work assigned to all their resources across all projects at a glance, so that he/she can see which resources are under- or over-allocated and can take steps to level out resource usage
Resource allocation	Shall provide the ability to change assignments and/or project start/ end dates easily (with just a few clicks) so that departments which have a large number of small projects and a steady stream of new requests for projects can quickly adjust project timelines without having to change the start and end date for each individual resource's allocation to that project.
Resource allocation	Shall provide the ability to associate skills or roles to resources, so that resource manager can view resources with particular skillsets (e.g. C#, business analysis) who are available
Resource allocation	Shall provide the resource manager with the ability to create/update/delete resources managed by them.
Resource allocation	Shall provide the resource manager and/or project manager the ability to assign resources to projects
Project Dashboard	Shall provide a dashboard that displays a consolidated view of a project
Project Dashboard	Shall provide the ability for project manager or system administrator to select what information to display on dashboard, e.g. scheduled end date, duration, current status report information, schedule overview.
Project Dashboard	Shall provide the ability to provide summarized or calculated data on dashboard, e.g. percentage complete, summarized budget and cost information, and other project delivery KPIs
Project Dashboard	Shall provide the ability to present project data in the project dashboard as graphs or charts for comparison, trending etc. Shall provide the option to present the data in selected chart styles (column, line, pie, bar etc.) and modify the chart style when needed.
Project Dashboard	Shall provide the ability to drill down from project dashboard to detailed project documents such as project schedule, project budget etc.
Project Dashboard	Shall provide the ability for project managers, portfolio managers, and senior managers to view dashboards directly within the solution
Project Dashboard	Shall provide the ability for project dashboards and reports to be shared with non-City staff, either via direct access to the solution or via an export
Portfolio Dashboard	Shall provide the ability to attach user-defined attributes to projects (e.g. maintain vs enhance vs compliance/legislative, infrastructure vs applications, service delivery KPIs) so that user can roll up costs, forecasts, timelines and other project data for programs or portfolios
Portfolio Dashboard	Shall provide a dashboard that displays a consolidated view of all the projects in the portfolio

Portfolio Dashboard	Shall provide the ability to roll up projects into programs and portfolios using multiple tiers. For example, projects roll up into a program within a department; major capital projects and programs from all departments roll up into a single CIO-level view that is segmented by service portfolio (the service the project or program supports)
Portfolio Dashboard	Shall provide the ability for project manager or system administrator to select what information to display on portfolio dashboard, e.g. Gantt chart view of all projects/programs, project status, whether the initiative is a project or a program, department, budget, actuals
Portfolio Dashboard	Shall provide the ability to provide summarized or calculated data on portfolio dashboard, e.g. variance between budget and actual
Portfolio Dashboard	Shall provide the ability to present data for a portfolio as graphs or charts on the portfolio dashboard for comparison, trending etc. Option to present the data in selected chart styles (column, line, pie, bar etc.) and modify the chart style when needed.
Portfolio Dashboard	Shall provide the ability to drill down, from the portfolio dashboard, to detailed project information such as project schedule, project status indicators and other project data
Portfolio Dashboard	Shall provide the ability for portfolio managers and senior managers to view dashboards directly within the solution
Portfolio Dashboard	Shall provide the ability portfolio dashboards and reports to be shared with non-City staff, either via direct access to the solution or via an export
Automated Workflows	Shall provide the ability to configure and distribute a form to collect information from users both internal and external to the city. When completed the information populates project data and can be used in project reporting. Information collection can include feedback on deliverables, project update information, feedback on issues etc.
Automated Workflows	Shall provide the ability to configure alerts, send a reminder, request an update, or send a request for approval based on project events (e.g. project is created, intake form is submitted, data is entered in a particular field, an assigned task is late) or based on a schedule (date/time or frequency such as every two weeks for a status update)
Automated Workflows	Shall provide user-configurable automated workflows, e.g. request for project approval flows from requester to sponsor, and PMO is then alerted. Forks in workflow can be defined based on project data or project attributes (e.g. projects with budget over $X need to be approved by Y)
Automated Workflows	Shall provide the ability to configure unique automated workflows on a per-project basis
Automated Workflows	Shall provide the ability to configure automated workflows through the graphical user interface of the solution, and without requiring programming
Automated Workflows	Shall provide the ability to configure automated reminders based on a pre-defined schedule (e.g. weekly or monthly), or a specific date and time. For example, a front-end user can set a reminder for a task completion date or a specific calendar date, a project manager can set a weekly reminder to update project status report information, etc.
Automated Workflows	Shall provide the ability to configure update requests for activities or tasks. Update requests can be sent from the application to anyone (including external users). The fields to be updated can be specified and a customized message can be included.

Automated Workflows	Shall provide the ability for a sponsor, manager or other stakeholder to request approvals. • Approvals of project artifacts (including documents) are tracked and managed through the tool, e.g. project charter, business requirements document
Configurability	Shall provide the ability to sort and filter project data in any project view.
Configurability	Shall provide the ability to filter project data by multiple criteria, and save filters for reuse.
Configurability	Shall provide the ability for a user to add custom data fields to an existing project (no programming required) through configuration as needed using pre-defined field formats
Configurability	Shall provide the ability for an administrator to configure standardized templates for project documents such as: project budget, project schedule, risk log, issue log, status report etc.
Configurability	Shall provide the ability for an administrator to modify the standardized templates that are used to create a project/program when the project/program information requirements change.
Configurability	Shall provide the ability to update project information in one location, and have that change reflected in all parts of the system that reference that information (i.e. double data-entry is not required to update project information). For example, Project information captured during intake such as Project Name is referenced by the project documents. If it is changed in the Intake data the change is reflected anywhere the project name is used and does not need to be updated in more than one location.
Reporting	Shall provide the ability to make project details and status reports available to external stakeholders and funders
Reporting	Shall provide the ability to run reports/create views of project, program or portfolio data for user-selected time periods (day, week, month, year, from/to dates)
Reporting	Shall provide the ability to create/configure reports and views based on project data such as: overdue tasks for a project, tasks completed for a specified period, tasks about to start in a specified period.
Reporting	Shall provide the ability to pull projects into reports or views based on program, portfolio, project attributes such as project health (red, yellow, green), and/or department
Reporting	Shall provide the ability to automatically generate status reports that include user-defined project data (e.g. project phase, project status, rolled-up project schedule) and project data to date such as remaining budget
Integrations	Shall provide the ability to export project data to Excel
Integrations	Shall provide the ability to import project data from Excel
Integrations	Shall provide the ability to integrate with standard business applications, including Teams, Office 365, FileNet, and SharePoint.
Integrations	Shall provide the ability to load (import) project data from an external business system
Integrations	Shall provide the ability to extract (export) project data from an external business system
Security	Shall track and provide the ability to view the history of all activity in the project (e.g. history of document views, field updates, deletes, who made the change etc.)