



TRANSBAY JOINT POWERS AUTHORITY

REQUEST FOR PROPOSALS No. 20-07 Program Management Information System

QUESTIONS & ANSWERS

The following questions were received related to the above-referenced RFP:

1. *I am a subcontractor DBE looking to partner with primes on this contract. What is the best way to connect with them on this project?*

TJPA recommends reviewing the scope of work (software procurement) associated with this RFP and the TJPA strongly encourages DBE participation on all contracts. Refer to TJPA's website page "Doing Business with the TJPA": <https://www.tjpa.org/tjpa/doing-business-with-the-tjpa>

2. *Can you tell me what your budget is for the system replacement? Who was the company that installed the system that you want replaced?*

A specific budget has not been identified for system replacement. Refer to RFP Section 2.3 on page 3. Currently, Autodesk maintains the current PMIS, Constructware. Implementation of Constructware was performed by Constructware in 2005. The collaborative file sharing system resides within Constructware and as a part of a local Microsoft network system implemented by Nexustek.

3. *Regarding 5.1.1 Introduction, Table of Contents and Executive Summary (2 page limit): Is the 2 page limit for the Executive Summary? Please confirm that the required introductory letter signed by a person or persons authorized to obligate the firm would be 1 page, the Table of Contents would be 1 page, and the Executive Summary would be 2 pages.*

The Executive Summary is required to be limited to 2 pages. The letter of introduction and table of contents will not be counted towards a page limit.

4. *Regarding 5.1.2 Understanding and Approach (5 page limit): If TJPA is expecting responses to each item in 3.4 Key PMIS Assessment Criteria, please increase the page limit for this section to at least 15 pages, or do not count responses to 3.4 in the 5 page limit. The questions in 3.4 are 3 pages, so including the questions and responding to each could easily take up at least 9 pages.*

RFP Section 3.4 criteria will be used by TJPA to review proposals in tabular form and encourages respondents to summarize software features; the page limit will remain 5 pages.

5. *Regarding Implementation “must be completed within 60 calendar days after contract award” per section 3.1 General in the RFP: After reviewing TJPA’s requirements for a Program Management Information System, it may not be possible to provide all of the requested functionality in 60 calendar days. Will TJPA consider extending the implementation time? Typical implementations for agencies similar to TJPA usually take 4 to 6 months.*
 - *If the TJPA implementation must be completed in 60 calendar days, should Respondents only propose functionality that can be implemented in 60 days as an initial rollout with the intention of an additional rollout to provide remaining functionality? If this is the approach, will TJPA list the priorities for what should be implemented in the initial rollout?*

Refer to RFP 20-07 Section 5.1.2 and provide timeline for implementation of the PMIS. Requirements contained with RFP Section 3 will be the basis for scope of services referenced by the Model Professional Services Agreement. Refer to RFP 20-07 Section 9 and provide noted exceptions within proposal.

6. *Regarding Objections to RFQ/RFP Terms, and Exceptions to the Model Professional Services Agreement: If these Objections and Exceptions are all submitted within (10) working days after the RFQ/RFP is issued as instructed, do these need to be included in the Proposal?*

Objections to the RFP Terms (Attachment 1) must be submitted within (10) working days after the RFP issue date. Refer to RFP 20-07 Section 9 and note any exceptions to the Model Professional Services Agreement within proposal.

7. *Regarding 5.2 Fee Proposal: Should the Fee Proposal Form be submitted in Excel or PDF format?*

Respondents may provide fee proposal in either Excel or PDF format.

8. *Regarding 5.2 Fee Proposal: For Software Licenses and Fixed Fee Services, should these fees be listed on the Supporting Schedule form/tab since these are not Direct Labor?*

Yes.

9. *Regarding 5.2 Fee Proposal: How many years of pricing should be provided for subscription-based pricing?*

Refer to RFP 20-07 Section 1, second paragraph, provide pricing for a 4-year base term with two 3-year extension options.

10. *Regarding Performance and Payment Bonding Requirements (Non-Construction): Will a Performance and/or Payment Bond be required? If yes, what are the bond amounts?*

No.

11. *Regarding Attachment 1, RFP General Conditions, A. Consultant Offices: Please confirm that travel expenses for any of the proposed work will not be reimbursed. If travel expenses will be reimbursed, please amend this provision in the RFP General Conditions.*

TJPA confirms that Respondent "Proposal" work associated with travel expenses shall not be reimbursed per the RFP General Conditions (Attachment 1). Refer to RFP 20-07 Attachment 2, Appendix B regarding travel expenses for "Awarded" work and to TJPA travel policy: https://www.tjpa.org/uploads/2009/11/Travel_Policy_for_TJPA_Consultants_Subs_Rev2009.pdf

12. *When is the anticipated start date for the Phase 2 Engineering Design/Construction?*

December 2020.

13. *What is the estimated size of the organization that PMIS supports? Does TJPA have a view on the roles, skills, and personas necessary?*

Refer to RFP 20-07 Section 5.2, paragraph two. Refer to RFP 20-07 Section 3.1, paragraph two.

14. *What challenges did you have with Autodesk and SharePoint that you are looking to address with PMIS Phase 2?*

Constructware (Autodesk) is the TJPA's legacy PMIS for the Phase 1 Program and requires routine and more frequent support. SharePoint may be proposed as a solution for this RFP scope.

15. *What other third party software interfaces will need to be created with the PMIS system?*

Refer to RFP Sections 3.3 and 3.4 regarding data export to MS Excel and schedule control import and export to Primavera P6 and/or MS Project.

16. *Does Owner intend for the PMIS solution to be used as a collaborative space between EPC, Owner, vendors, etc.?*

Yes.

17. *Is it correct to assume the majority of the customization is supposed to be completed within 60 days? Would the level of support after that be the 24/7 support and help desk?*

Refer to RFP 20-07 Section 3.1 paragraphs three and four on page 4.

18. *In order to govern and adopt the use of the tool, will it be expected for the vendor to do that or will you be resourcing that internally?*

Governance and adoption for the use of the tool shall be resourced as a part of TJPA future procurement documents.

19. *Can we use a solution developed by a firm outside the US?*

Refer to RFP 20-07 Attachment 4 and to RFP 20-07 Attachment 1, Sections A and O.

20. *Can offshore resources be used for the PMIS Maintenance and Support?*

Refer to RFP 20-07 Attachment 4 and to RFP 20-07 Attachment 1, Sections A and O.

21. *Will the system be used for active drawing mark up and tracking?*

Refer to RFP 20-07 Section 3.5 regarding design and engineering collaboration tools.

22. *If technology tools are required, how should costing be submitted?*

Technology tools may be proposed, and costs will be submitted per RFP 20-07 Section 5.2.

23. *What are the expectations for vendor personnel to be on-site? What additional safety measures are in place on-site to mitigate COVID-19 related safety concerns?*

Refer to RFP Section 3 regarding scope of services for software. Vendor personnel are not required to be on-site. Refer to City and County of San Francisco website regarding updated COVID-19 information: <https://sf.gov/topics/coronavirus-covid-19>

24. *What version of SharePoint are you currently using?*

The TIPA is currently using the latest version of SharePoint.

25. *Are you on and/or plan on using Microsoft 365 and SharePoint Online?*

The TIPA is currently using Microsoft 365 and SharePoint Online.

26. *Do you have or plan on having Microsoft Power BI licenses for reporting?*

No.

27. *Is your current SharePoint sites equal to a project in your current environment? How many sites are there?*

No.

28. *Is there a meta data structure already in place in your current SharePoint? Would you want to replicate that structure or re-engineer it?*

No.

29. *What is included in Phase 1 data to be imported? How much data, types/format of data, and which system is that data stored?*

Refer to RFP 20-07 Section 3.3, System Features, last bullet, Phase 1 data includes Constructware database with PDF files and data structure of approximately over 1-terabyte.

30. *Is the migration of the data to be part of the proposal?*

Refer to RFP 20-07 Section 3.3, System Features, last bullet, Phase 1 data migration is optional.

31. *What tools are you currently using for reporting both dashboards and paginated reports?*

TJPA uses Constructware tools.

32. *What tools are you currently using for forms (such as RFIs, Submittals, etc.)?*

TJPA uses Constructware tools.

33. *Do you use Primavera P6 for cash flow/cost forecasting?*

No.

34. *In Section 3.1 (General) the stated requirement is "Implementation may be phased (background, research, planning, execution, and fine-tuning) but must be completed within 60 calendar days after contract award and receipt of written notice to proceed from the TJPA." Does the PMIS need to be fully configured and put into production within 60 days? Or does the TJPA want the base COTS software functional within 60 days so that the TJPA can begin making their own customizations to the PMIS?*

The later, TJPA anticipate base Commercial-off-the-shelf (COTS) software functional within 60 days so that customizations can be made by TJPA to the PMIS.

35. *In Section 3.3 (PMIS Requirements), please provide further information about the following three requirements under the "Functionality/Modules" heading:*
Public records requests for information
Legal discovery
Correspondence module

As a public agency in charge of capital improvement projects, the TJPA requires a robust query/search function associated with public records requests and legal discovery. A correspondence module is also requested to track Program/Project letters, emails and other correspondence.

36. *Does the TJPA want the vendor to create a public portal that can be used by external stakeholders so that they can interact with the PMIS without having a login to the system? Or does the TJPA want the vendor to configure forms and processes in the PMIS so that just internal users can interact with the modules listed above?*

PMIS must be configured such that external and internal users work collaboratively with the modules listed above.

37. *Will the vendor's solution need to integrate with the TJPA's financial systems? What system(s) does the TJPA use to manage its finances?*

No.

38. *How many external users/stakeholders will be using the PMIS? Will all of these external users need to have a login to the PMIS?*

Refer to RFP 20-07 Section 5.2, paragraph 2. All users (internal and external) and will be using the PMIS with logins.

39. *Does the TJPA already have its own licenses for Bluebeam Revu Studio?*

No, Refer to RFP Section 3.5, bullet 11, sub-bullet 3.

40. *In Section 3.5 (File Sharing Applications Requirements), Bare Metal Backup and Cloud-Based Backup are listed as requirements. Does the TJPA need both? If the vendor provides a SaaS solution that is hosted in the Cloud, will Cloud-Based Backup meet the needs of the TJPA?*

The TJPA prefers both Bare metal backup and Cloud-based backup. Vendor may proposed SaaS solution hosted in Cloud.

41. *Does the TJPA want the vendor to respond to each of the requirements listed in Sections 3.2 through 3.5? Can the vendor's responses be added to the proposal document after the "Other Required Documents"?*

Refer to RFP Sections 4 and 5 regarding minimum required skills and experience and proposal requirements. Respondents will tailor its services to meet the needs of the TJPA. Refer to RFP Section 5.3 regarding "Other Required Documents".

42. *Are vendors allowed to make any exceptions to the terms in the Model Professional Services Agreement (RFP Attachment 2)? If exceptional are allowed, can they be added to the proposal document after the "Other Required Documents"?*

Refer to RFP Section 9, paragraph 3, Respondents will note exceptions; these exceptions may be added after completed "Other Required Documents" and will not be counted in page limits.

43. *Will the TJPA be holding a Pre-Bid Conference Meeting for this RFP? Will there be a Pre-Bid meeting held to inform bidders about the contract and SBE requirements as indicated in the Good Faith Efforts Form?*

No, a pre-bid conference meeting will not be held for this RFP 20-07 associated with software procurement. Refer to RFP 20-07 Section 11.3 SBE Utilization Goal of 5.92%.

44. *Are any bonds applicable for this RFP?*

Refer to answer to question 10.

45. *How many years of cost is required? Please provide the annual user count by year for amount of years to be quoted.*

Refer to RFP 20-07 Section 5.2, paragraph 2.

46. *Can legitimate workers from other countries work on this contract remotely that don't have US work permits?*

Refer to RFP 20-07 Attachment 4 and to RFP 20-07 Attachment 1, Sections A and O.

47. *Is Office 365 available for all intended users?*

No.

48. *What applications are expected to be integrated?*

RFP 20-07 does not require application integration.

49. *Is MS Teams and or MS Planner in use by intended users?*

Yes.

50. *What competitive products have been informally or formally reviewed that meet these requirements?*

For the PSIM, the following products were informally recommended to meet Phase 2 Program requirements: Constructware, Prolog, Expedition, and Kahua.

51. *What vendors were invited or sent this RFP?*

Specific software vendors were not invited or sent this RFP. This RFP was published on DemandStar and was distributed to parties interested in contracting opportunities with the TJPA.

52. *Please provide the list of plan holders to this RFP.*

There is no list of plan holders for this RFP 20-07.

53. *Incumbent tools - What incumbent tools are being used now?*

Refer to RFP 20-07 Section 2.3.

54. *Incumbent tools - Does the incumbent tool meet the needs of this RFP?*

No.

55. *Incumbent tools - What is the annual cost of incumbent tool?*

Approximate annual cost of the incumbent tool(s) ranges from \$10,000 to \$100,000 per year (2005 – 2020).

56. *Migration - How many projects need migration?*

Three projects may be optionally migrated.

57. *Migration - What kind of data needs migration (documents, forms, schedules, etc)?*

Refer to answer to question 29.

58. *We have a question on responding to the functional requirements listed in Section 3. The proposed software can meet these requirements and we had planned to do a very high level overview in the Executive Summary. We also we saw in Section 5.1.2 that we are evaluated on how our approach aligns to the requirements listed. Our question is surrounding the content in Section 3: Some items are written as questions which led our team to question if you wanted individual responses to each bullet point. If so, we would propose this be in an appendix that did not interact with the current page count limit. Can you please clarify the intention of where or if we should respond to the three pages of functional requirements?*

Refer to answer to question four.

59. *Is there a current tool being replaced? If so, what is reason for replacing the current system?*

Refer to RFP 20-07 Section 2.3.

60. *Are all existing business processes and workflows going to also be used for ph2? ie will COVID impact any of these processes?*

Yes, existing Program processes and workflows will be used for Phase 2. These processes and workflows will be modified on a case by case basis per applicable local, state and federal ordinances.

61. *Have they undertaken any business requirements analysis? If so, can we have access to this for our response?*

Not Applicable.

62. *What is the timeline and expectation to transfer system records from PH1 into the new system?*

Optional transfer of system records from Phase 1 into the new system is anticipated to be December 31, 2020.

63. *How many user licenses were used on ph1 for the PMIS system?*

In 2005, Constructware provided infinite user licenses for the Transbay Program. In 2006, Autodesk purchased Constructware and eventually ended the infinite user license model provide 175 user licenses for the Transbay Program.

64. *How many licenses are expected for PMIS? Internal TJPA and External – Partners, Contractors, consultants, 3rd party, etc.*

Refer to RFP 20-07 Section 5.2, paragraph two.

65. *What tools are being used to manage engineering and design phase? Will design documents stay in this system or migrate to new PMIS?*

Refer to RFP 20-07 Section 3.2 Components of the PMIS. Historic design documents (Phase 1 data) may be optionally migrated to the new PMIS.

66. *60 days – one agency or multiple agencies? What is expected to be complete in the 60 days? Clarify liquidated damages for delivery of solution*

Refer to RFP 20-07 Section 3.1, new PMIS expected to be live within 60 calendar days of contract award and issue of written notice to proceed and available for all internal and external users (multiple agencies). Liquidated damages have not been developed for this procurement.

67. *Does the system have to be completely installed and integrated with all agencies within the 60 days? How would impact delays by agencies on achieving 60 days be managed?*

Refer to answer for question 66. Implementation of new PMIS will be independent of other agencies.

68. *We assume DBE goal is related to professional services as software is a fixed cost. Can that be confirmed.*

Refer to TJPA weblink regarding DBE policy: <https://www.tjpa.org/uploads/2009/07/010-DBE-Policy-updated-Sept2012.pdf>

Also refer to RFP 20-07 Attachment 5, Final Expenditure report regarding calculation of DBE participation.

69. *Has a budget been established for the new PMIS?*

Refer to answer to question two.

70. *Are there any conflicts around current or future work for all parties*

No.

71. *Are there opportunities for staff augmentation after the implementation of the system?*

No.

72. *Can you clarify Project Human Resources – is this a coordination with other systems or a feature to be part of PMIS. Most HR systems are purpose built with APIs to other systems.*

Yes, this not a company HR system reference; rather, for a PMIS, this refers to user (internal/external) and account management.

73. *Is there a list of systems that need to be integrated with in the immediate timeframe.*

No.

74. *3.3 (System Features) We understand that the Phase 1 work and PMIS systems will be closed out. With regard to the optional item, Ability to import Phase 1 data and/or database from the current system, (a) Can TJPA give more details on the migration scope and timeline that would be required? (b) Does TJPA anticipate that the selected contractor would perform the data migration from the existing Phase 1 system into the new system (vs. providing TJPA the ability to do so internally)? (c) If so, please indicate how much and what kind of data needs to be migrated.*

TJPA anticipates that Phase 1 Constructware database consisting of approximately one-terabyte of Autodesk data can be exported from the existing PMIS system within three weeks and migrated into a new system within three weeks.

75. *3.3 (System Features) What is the total anticipated budget for Phase 2 projects, as some commercially available software solutions base their licensing costs on total value rather than users?*

In 2016, the total anticipated budget for Phase 2 at year of expenditure was estimated to be \$3.966 Billion. Refer to RFP 20-07 Section 5.2 for structure and requirements for fee proposal.

76. *3.3 (Functionality/ Modules) The RFP lists "Customizable reports that can be easily created by users." Can you provide some sample reports and templates that are currently used in Phase 1?*

No. Phase 2 reports and templates will be based upon native new PMIS.

77. *3.3 (Functionality/ Modules) The RFP lists "Customizable dashboard." (a) Does TJPA anticipate that users will be creating custom dashboards or that the contractor would be responsible for creating the customized dashboard for the user to utilize? (b) What features would TJPA like integrated into the dashboard?*

TJPA anticipates new PMIS to contain a base dashboard that can be customized by all users to contain summary of metrics such as but not limited to open RFIs, open Submittals, action items, ball in court, cost information, schedule information and other relevant program/project information.

78. *Attachment 1 (A - Consultant Offices) What portions of the scope must be in-person at TJPA's facility? What portions of the scope are acceptable for remote work? (a) for functions that coincide with governmental restrictions due to COVID-19 (b) for development tasks and subsequent ongoing support for document control clerks, system administrators, 24-hour help line, or other functions*

All portions of the scope of work for PMIS software procurement may be performed remotely; however, RFP 20-07 Attachment 1 (RFP General Conditions) states “reasonable amount of time” to facilitate proposal work and award implementation of work within the same time zone.

79. *Attachments 4 and 5, Will TJPA be providing fillable copies of all forms that are required with the proposal submittal, including the certifications in Attachments 4 and 5 (e.g., Bidders/Proposers Information Form, etc.)?*

Attachment 4 is only provided in non-fillable PDF format. Attachment 5 may be found as an MS Excel file at the following TJPA website link: <https://www.tjpa.org/tjpa/doing-business-with-the-tjpa>

80. *Regarding TJPA's RFP no, 20-07 for PMIS, we would like to know if offshore resources are acceptable for the proposed team.*

Refer to RFP 20-07 Attachment 4 and to RFP 20-07 Attachment 1, Sections A and O.

81. *Is TJPA expecting responses to the questions in Section 3 on software functionality? and if so, what is the page limit as it is not addressed in Section 5, Response Requirements.*

Refer to answer to question four.