Questions and Answers for Project Portfolio Management Solutions

Question	KHS Response
1. Please identify the PPMS Tools Manufacturers that were submitted to your RFI.	Meisterplan, Principles of Execution, TempusResource, Sciforma, TeamDynamix, WorkFront, Clarizen and Smartsheet.
2. Will intended staff have access to SharePoint Online, MS Teams, OneDrive, POwerApps, or PowerBI?	KHS leverages on premise technology for all Microsoft products including SharePoint. In order to have access to online versions, they would need to be provided or KHS would need to migrate to online solutions. PMO/IT: Sharepoint- access to on premise version PMO/IT: MS Teams- currently accessible PMO/IT: OneDrive- currently accessible however, not used IT: PowerApps-KHS does not have access to this licensing so vendor would need to provide or KHS purchase IT: PowerBI- KHS does have limited access to this licensing so vendor would need to provide or KHS purchase

3. Please identify the Project Server features to migrate:
   a. Projects? How Many
   b. Custom Fields? How many
   c. Documents? How many?
   d. Forms? (Issues, Risks, Change Orders, Lessons Learned, Others?)
   e. Project life cycle workflows? How many?
   f. Customizations – Please explain and identify.
   g. Please Identify other features used needing migration.
	a. Approx. 100
	b. Less than 10
	c. Approx. 5,000 (est 50 per proj)
	d. Yes, about 5 lists
	e. No Workflows
	f. None other than listed above
	g. Schedule and project details

4. When is it expected KHS intends to use MS Azure Devops (new version of TFS but online).	KHS intends to upgrade TFS to Azure DevOps Server in 2021. We do not intend to use the online version.

5. What features of TFS do you use that need integration (tasks?, Issues?, other?)	Portfolio, Products, Projects, Features, PBI's, Tasks, hours and dates. All fields are leveraged for each.
6. Please Include samples of forms mentioned Process Flow Visio sent to RFI participants.	📄 PDF DRAFT Corporate Project Proposal 📊 2021 Portfolio - ProPlanning Summary -
7. You are asking questions about vendor staff size with organization chart requirements. Is there a minimum company/staff size required to support KHS?	Question is unclear.
8. Confidential Question: We intend to recommend a solution migrating your Project Server to MS Project Online and add our apps & configuration that meets your requirements, exactly. Further we would intend to sync TFS projects to Project Online so PWA Reports, Timesheets, MS Teams & MS Planner are completely integrated. This way TFS & PWA projects would share a common Resource Pool, be able to update progress in the timesheet, TFS or MS Planner, and allow consolidated reporting between Agile and Waterfall projects. If this mismatches your requirements, please explain gaps.	We already use MS Project on-line (on prem version). We do not have separate projects in TFS and MS Project Online. All projects are a hybrid using both systems. We need a solution that focuses on portfolio requirements and resources. We would need to see how this makes our current process better. We would still want to track time through TFS.
9. Please share the Excels you use to provide Team Foundation Server reporting.	(See above embedded samples)
10. Will you want Adoption & Change Management Consulting Support to ensure the deployment succeeds or do you have a Change Management staff that would handle this?	We would want assistance with set up and initial "train the trainer" type support
11. Are Budget, Cost, Variance, Change Orders & Benefits management/tracking features needed for this deployment?	We would want reporting on all of this. The data for some items may come from KHS internal reporting
12. Is Fund Management, Approval and Tracking needed?	We need Portfolio Budget reporting. We may want fund management, approval and tracking for project reporting since reports and meetings have to be had with finance to allocate the funds. Having this information can make it easier.

13. Will there be any Construction or Facilities projects needing to be managed with this tool?	No
14. Do you have any documents that summarizes your current portfolio planning process, that you can share?	(See above embedded samples)

15. Can you confirm KHS is interested in replacing Project Online or Project Server or interested in continuing to leverage it?
    a. On page 12 of the requirements, it states: "Project Management Solutions (to replace MS Project): Provides project management solution capabilities to replace need for use of Project Web Access/MS Project applications and house all PPM capabilities into one platform,"
    b. However, on the same page, it states the requirement to integrate with Project, Project Server and PWA.
	We do have an interest to replace Project Online/Project Server if the PPM solution offers both portfolio management and project management capabilities. Our desire is to streamline down to two environments – TFS and PPM solution. Ability to integrate with Project Online/Project Server is relevant for transition of our existing data into the PPM solution.

16. In light of question 1, is it correct to assume KHS is using Project Server (on premises) today?	Yes
17. Can KHS share what solution demonstrations were seen as part of the RFI process last month and what did you like about each?	Meisterplan, Principles of Execution, TempusResource, Sciforma, TeamDynamix, WorkFront, Clarizen and Smartsheet.
18. Is there a target go-live date?	Q2 2021

19. Do you have any specific reporting requirements? For example, you might have reports you produce currently to manage resource demand or timesheets.
 	
    a. Will reports / dashboards be developed from scratch, or do they currently exist in some format (e.g., Excel)? Are there examples for review to better assess size and scope?
    b. How many reports do you anticipate requiring?
	Yes we have specific reporting requirements. We have identified general reporting requirements in the RFP.
	
	Current reporting is in Excel. See samples embedded above. Number of reports will be based on business need.

20. Do you plan to utilize a standard lifecycle workflow to route project requests through from ideation to completion? If so:	Yes we would like use standard workflows/triage processes for various project categories. We are continually evolving these workflows and associated documentation.

a. Will you require more than one workflow? b. Are the workflow(s) you require already documented (as far as what you would like the system to do)?	
21. Approximately how many of the following will be configured within KHS's solution: a. Project Templates b. Enterprise calendars c. Schedule templates d. Project site templates e. Resources f. Custom fields g. Custom views	All

22. Are there any training requirements associated with this engagement? If so:
a. Which type(s) of training are anticipated? Potential type / roles:
    i. Team members
    ii. Resource managers
    iii. Project managers / program managers
    iv. Portfolio managers
    v. Executives / reports
b. How many training sessions/workshops are envisioned for each group?
	Yes – trainings
	How many – to be assessed

23. Is there information available regarding the types and anticipated number of system users? a. How many portfolio managers are anticipated? b. How many resource managers are anticipated? c. How many project managers are anticipated? d. How many general (team member) users are anticipated?	Are user base will span (numbers will vary): Executives Staff managers Portfolio manager Project managers Business directors Select team members
24. Are vendor provider resources allowed to perform work remotely? a. If work can be performed remotely, are there a minimum number of on on-site visits required/desired?	Yes, vendor resources are allowed to perform work remotely. Typically, we do like to have on site visits however given our current situation, all work will likely be done offsite in a remote capacity.
25. Is Active Directory integrated/synced with Office365? If not, is this part of scope to integrate AD to Office 365?	Active Directory is integrated into O365.

26. What is the projected length of the contract?	Multi-year
27. Does Kern Health Systems have a budget amount allocated for this contract?	Yes
28. Can you elaborate on the financial statements required for a bidder?	KHS is requesting three years of financial audited statements.
29. What type of financial information is Kern looking for?	Three years of audited statements.
30. Would Kern accept two years of permanence and financial status history of prepayment is required?	(Unclear question)
31. Under Attachment A – Scope of Service, for the requirements listed under the Statement of Work, would you like providers to address each requirement point by point or simply address each category with a narrative response?	Please detail what requirements the vendor can meet.
32. Under Attachment C – Company Evaluation Criteria, Section B asks for present financial statements. As a privately-owned company, our financial statements are considered confidential. In place of providing our audited financial statements, would [Company] be willing to participate in a phone call with our CFO to discuss our financial stability?	Yes, if needed
33. Due to COVID, are electronic signatures acceptable?	Yes.
34. Under "Additional Background Information- Kern Health Systems' Responses to RFI Questions: Question 1 for Licensing – Can KHS clarify what specific project level (PPM) access and or information that the 400 users only requiring "read only" access will require within the PPM solution?	We would like to better understand the licensing structure, for example: read only licensing, admin licensing, user licensing model. For users who need to write or update data in the system vs just read data from the system.
35. Under "PPM Solution Requirements – Page 12 – Strategic IT Requirements - Team Foundation Server Integration – Can KHS provide any additional information or detail related to the anticipated behavior of the TFS integration (i.e. one-way, bi-directional, real-time, additional behavior detail if any that might be helpful) and the same detail along with a list of any other anticipated integrations from outside system to the PPM solution for the purpose of the vendor having this additional for scoping a professional services statement of work to include all integration requirements.	Ideally, KHS would like the capability for bi-directional data feeds near real time.

36. Once proposals are submitted, what sort of engagements will take place between November 2nd and December 10th (final decision), between prospective vendors and KHS? (ex. Product Demonstrations, Technical integration discussion/deep dive, etc.)	Based on RFP responses, will determine if virtual demos needed to see key solution capabilities. Procurement will advise on any other engagements.
37. Will vendors have an opportunity to meet with KHS team members/key end-users of any potential PPM solution, prior to the November 2nd proposal deadline? This would be to further scope out the solution as it relates to requirements listed in the RFP and help with generating the most accurate SOW based on your organization's expectations and requirements.	Based on RFP responses, will determine if virtual demos needed to see key solution capabilities.

38. In regards to the TFS integration: Can you provide a high level explanation as to what you're looking to do to bring TFS data in and what data will be accessed?
   a. Will data need to flow uni or bidirectional? If unidirectional, which direction?
 	
   b. What type of data is being integrated across these two systems? Is it high level-summary data, line-item data, or both?
 	
   c. How many fields should be mapped across systems (approximately)?
 	
   d. What transformations to the data or aggregation should be performed during the integration if any?
 	
   e. Should the integration operate on a schedule (e.g. hourly, daily, etc.), on-demand (e.g. via a manual button click), or in response to an event (e.g. as soon as a record is updated)?
	At a minimum, data needs to flow from TFS to the PPM solution. Bi-directional would be ideal. KHS uses the data not only for TFS but other data sources internally such as dashboards, work models, etc.
	
	a. TFS to PPM and PPM to TFS – resource and task data that would be rolled up in the PPM solution
	
	b., c. d. – requirements to be determined
	
	e.- requirements to be determined

39. Will budget tracking be part of this solution? If so, how detailed and complex are these budgets? (ex. is there a need for month over month or year over year reporting)	At portfolio level – yes for month over month, year over year. There is the potential for cost center management such as dept budgets, capital and operating expenses.

40. Are projects grouped into programs/categories in some way? Will you need visibility into projects by each program/category and would projects relate to a single project/category or many?	Yes, but not all
41. Would there be more than one portfolio level view required? What other dashboards would be needed for visibility into work?	Yes, portfolio views required for: Executive level Project categories Budget tracking Change control Risk management Roadmaps Scenario planning Custom views We are looking for configurability.