REQUEST FOR PROPOSAL #2020-002
ITSM/PPM Solution
RESPONSE ADDENDUM #01

DATE: August 14, 2019

CLARIFICATIONS

Submission deadline is modified to August 30, 2019 11:59 p.m. EST

QUESTIONS

1. Whether companies from Outside USA can apply for this?
     (like,from India or Canada)
    ANSWER: Refer to RFP Section 1.3.2 Eligibility to Submit Responses.

2. Whether we need to come over there for meetings?
    ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews

3. Can we perform the tasks (related to RFP) outside USA?
     (like, from India or Canada)
    ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews.

4. Can we submit the proposals via email?
    ANSWER: Refer to RFP Section 1.3.8.

5. How can we provide comments if any on the clauses shared?
    ANSWER: In Appendix E Master Agreement there are specific questions concerning key terms of the Agreement you should use that form to provide any additional information.

6. Would you be able to provide the forms we need to complete with our response in a MS Word format?
    ANSWER: Yes

7. What is the current Help/Service Desk tool you are using today?
    ANSWER: JIRA Service Desk

8. How many total employees do you have in your IT department?
    ANSWER: 202 regular employees and approximately 150 student employees (at peak)

9. How many are tier 1 support?
    ANSWER: Approximately 60 regular IT staff, plus additional work study students

10. For implementation, what integrations should we include in our cost estimates (ie. AD, email etc.)?
    ANSWER: Integrations will depend on the solution selected and subsequent business process reviews. At a minimum, solution will need to integrate with LDAP and email.   A list of options could be provided with the cost proposal.

11. For importing of user/employee contact data what sources do you have that we will need to integrate to (ie. Active Directory)?
ANSWER: LDAP

12. For single sign-on what technology do you have in place today (ie. SAML, Windows Authentication, Shibboleth)? If you are looking at a hosted solution do you have ADFS enabled?
ANSWER: Shibboleth is preferred, but other options can be supported (CAS)

13. What Chat and Remote Access tools do you currently own?
ANSWER: Google Chat, Team Viewer and Zoom

14. For implementation, what processes/capabilities should we include in our cost estimates (ie. Incident, Request, Change, Self-Service etc.)?
ANSWER: Refer to RFP Section 1.1.4 (Product and Services Scope)

15. Is it a deal breaker if we are not WCAG 2.0 compliant?
ANSWER: It is expected that the vendor will make commercially reasonable efforts to comply with all applicable provisions of the WCAG 2.0.

16. What is the total or estimated number of IT Service Agents/Technicians that will be using the solution?
ANSWER: Estimate 350 agents including part time student workers; In our current solution, we have over 500 active agents, but it includes some non-IT staff.

17. What specific tools are currently used by the University of Maine (and each campus if different) for ITSM and PPM?
ANSWER: JIRA Service Desk is used for ITSM; PPM is conducting using a variety of tools including Google Drive, Smartsheets, and JIRA.

18. What systems are integrated with the ITSM and PPM tools? Will those be replaced or expected to be retained?
ANSWER: Google Chat via custom API script, EMail, LDAP. These should be retained and/or expanded.

19. Does the scope include process optimization and automation or is it limited to tool conversion?
ANSWER: Refer to RFP Section 1.1.4 (Product and Services Scope)

20. Does the scope include data migration? If yes, for what duration?
ANSWER: At a minimum, scope should include migration of Open tickets, Knowledgebase content, Asset information, and Service Catalog. Additional migration needs may be determined during process review and depending on cost, timing, best practice, etc. Likewise, volume of content to migrate will depend on process reviews and recommendations. Current content is stored in existing tools including JIRA Service Desk, JIRA, Confluence and Google Sheets.

21. What is the current baseline that the University is attempting to improve or what are some of the current issues are you looking to resolve? Does this relate to Customer Support, Desktop Technicians, Network, all encompassing or is it a specific area of focus?
ANSWER: Refer to RFP Section 1.1.4 (Goals to be Achieved)

22. Has the University (or any of the campuses) had any process improvement reviews, if so, can this be shared?
ANSWER: Internal process reviews have been conducted, but are not in a shareable format. The scope of this RFP includes consulting services to conduct additional process review.

23. Do you have defined SLAs for Incidents and Requests?
ANSWER: We are in the process of developing SLA standards, but they are not currently defined.

24. Do you currently perform customer surveys, and if so, what mechanism/rules are used?
ANSWER: Customer surveys are performed using a Google form.

25. Do you use Active Directory?
ANSWER: Yes

26. Approximately how many Knowledge articles will need to be moved into the new system, and where are they currently stored?
ANSWER: Knowledge articles are currently in Confluence.

27. What is your primary authentication method for Applications?
ANSWER: SSO - Shibboleth is preferred, but other options can be supported (CAS)

28. What tools specifically do you use for Project Management today?
ANSWER: Smartsheet in conjunction with GSuite applications.

29. How large is your IT department?
ANSWER: 202 Employees

30. How many people work on the help desk?
ANSWER: Approximately 60 plus work study students

31. How many assets are you looking to manage in the solution?
For how many endpoints (desktops, laptops, servers) do you want to discover and monitor software compliance? Please provide breakdown by OS (e.g. Windows, Mac, Chrome, etc.)
ANSWER: The University of Maine System estimates it has 7,500 Windows and Mac workstations. For the past 5 years we have undergone efforts to reduce Active Directory Domains and bring all workstation assets under one domain. In some cases, we are aware of devices that most likely are not managed in any way, which makes the number 7,500 an estimate. With no prior asset inventory system, we are starting from the ground up.

32. What tool(s) (if any) is/are being used to fulfill the functionalities being requested?
ANSWER: JIRA, JIRA Service Desk, Confluence, Smartsheets, Google Suite

33. Is there a prevailing event/initiative/etc. that triggered the creation and release of this solicitation?
ANSWER: No

34. What ITSM processes does the University of Maine System currently have processes for?

    a. Incident Management/Request Management
    b. Service Portfolio Management
    c. Service Level Management
    d. Project Portfolio Management
    e. Problem Management
    f. Knowledge Management
    g. Asset and Configuration Management
    h. Change Management
    i. Release Management
    j. Financial Management
    k. IT Service Continuity Management
    l. Availability Management
    m. Information Security Management
    n. Event Management
    o. Capacity Management
    ANSWER: Refer to RFP Section 1.1.4 (Current State of IT Service Management and Portfolio Management)

35. Do you currently have a Change Management process, regardless of its maturity level? Please describe it at a high level.
ANSWER: The organization currently has multiple processes for Change Management, but not consistent single process. Change management is at a low level of maturity in the organization.

36. If there is a particular process that the System currently does not have established/documented, is the design of that process part of the scope of this project?
ANSWER: Yes

37. Does the System currently have a service catalog?
ANSWER: Yes. Refer to RFP Section 1.1.4 (Current State of IT Service Management and Portfolio Management) - 4th bullet.

38. Is importing data from the existing systems within the scope of this project? Will data be imported into the new solution, or simply linked to for historical purposes? What is the approximate volume of data to be imported if not linked?
ANSWER: See question 20.

39. If so, what type of data (e.g. incidents, knowledge articles, asset information) need to be transferred? How many records are there and what type of format will the data be in?
ANSWER: See question 20.

40. What integrations in scope of this project? What tools will the solution need to integrate with for one-way and bi-directional data transfer? Could the System please list the applications, and in what way they are to communicate with the tool?
ANSWER: See question 18. Additionally SSO integration is desired for this solution.

41. Could you please provide a use case or user story that is representative of each of the integrations desired?
ANSWER: Development of use cases and user stories is within scope for the business process review included in this RFP.

42. Will there be multiple business units (such as Facilities or HR) using this for processing tickets? If so, will these need to be broken out? Will they need separate service catalogs? Will they need separate portals?
ANSWER: The intent of the initial implementation is IT only, but future expansion to other areas may be possible.

43. Has a budget for this project been determined? If so, what is the budget for this project?
ANSWER: Not at this time.

44. Does the System have a target Go-Live date for the selected solution?
ANSWER: We expect this implementation to be phased depending on the solution and recommendations of process review.

45. What is driving this target date? (E.g. upcoming renewal of existing solution, budget cycle, etc.)
ANSWER: N/A

46. Based on its procurement process, could the System please provide the expected of when the vendor would be selected, and when the contract would be formally awarded/executed?
ANSWER: Refer to RFP Section 1.3.1 (Timeline of Key Events)

47. Has UMS developed a list of specific requirements that it is seeking in an ITSM/PPM solution?
ANSWER: Respondents will be scored based on responses to RFP questions, rather than a list of specific requirements.

48. In addition to the ITSM/PPM software provider, is UMS interested in the possibility of using a third party consultant to support process improvements and the ITSM/PPM implementation efforts?
ANSWER: Yes

49. Based on our experience, we believe the addition of a third party consultant(s) could be desirable for this project. Will UMS accept and consider a proposal from a third party consultant who is bidding on a subset of the services listed in Section 1.1.4 of your RFP?
ANSWER: Yes

50. UMS previously issued RFP 2019-039 (Consulting Services: ITSM/PPM Business Analyst), which was canceled. Is this current RFP (2020-002) considered a revised or replacement RFP for 2019-039?
ANSWER: No

51. In terms of pricing, what are the numbers of users for both project management and ITIL?
ANSWER: Number of users will depend on the types of roles available in each area. Our organization has approximately 200 FTE, 350 agents including part time student workers, and 6 project managers.

52.

In our solution, we support an active named user license model, that will allow you to deactivate a license for one user and activate the same license for another. With that in mind we have several different types of licenses based on desired functionality and each type is priced differently. Our discount model is based on overall licensing volume so knowing these estimates will help us provide a more accurate quote.

Using the below license type descriptions, can you provide a more detailed breakdown of how many of each type will be needed across your organization?

License Type Breakdown:
- Enterprise License - Full ITSM and PPM capability.

Must have an Enterprise License to do the following:

- Access to all global reporting application (Analysis) which includes out of the box reports and custom reporting tools. Please keep in mind that Technician licensed users, noted below, have the ability to access and create reports at the application level, not globally across multiple applications.
- Global administrative access to maintain system configurations and settings.
- Participate in the portfolio planning & project governance approval process
- Manage Project Status, charter, resources and budget information

Common roles include: Executive leadership, Directors of different Service Management groups, System Administrators, Service Managers, Portfolio Planners, Project Managers, and Resource Managers.

- Technician License - Technicians can manage **every aspect** of **the ticketing life-cycle** with full access to the ticketing and asset applications for both help desk and operational tracking functions. Service desk technicians are focused on managing tickets (service requests, incidents, Problems, and changes) as well as operational work and project work.

Technicians also have the following **project** related capabilities: Ability to update task, issue and risk information. This includes tracking time, expenses, and status against Tasks, and Issues. Technicians can also create issues, tasks, task plans as well as upload/download project documentation.

- **Student Technician (Part time Technician) License -** These users have **all** of the **capabilities** of the **Technician** but this license is designed specifically for help desk resources who **work less than a full time schedule**.

Client License - Ability to **submit requests through the client portal service catalog, view request status, approve workflow steps, engage with the knowledge base, view project information,** be **assigned project work** (no update capability just comments), and **add/update documents, issues and risks to projects.**
ANSWER: We are unable to address this question at this time