

**Universal Service Administrative Co. (USAC)
IT-23-072 – PPM Tool
Questions & Answers**

Q#	Question	Answer
1	Does the PPM Tool have to be FedRAMP?	USAC has removed the FedRAMP requirement for the PPM Tool. USAC will evaluate the security information of each tool as provided by the Offeror with their proposal. The security requirements are outlined in Attachment 2 (PPM Fit Gap Requirements), “Security & Operations Req.” tab.
2	Is USAC presently planning and executing projects using a CPM scheduling? If so, what is USAC using?	USAC uses MS Project for project scheduling, and Power Plan, MS Project, and PowerPoint to show project schedules.
3	Is Jira on premises or on the cloud?	Jira is on premises currently with no short-term plan to transition to a cloud environment.
4	Are there programs for earned value management?	No, not at this time.
5	Is the vendor only providing professional services or also licensing?	USAC is seeking a complete solution, including any required licenses and professional services from the Offeror to tailor the tool to USAC’s needs and integrate the PPM Tool into USAC’s systems. The Offeror should propose the tool that the Offeror will integrate.
6	How many projects are in Jira presently? Does USAC need assistance with data migration?	Projects in Jira are a collection of issues, and historically, USAC has used JIRA projects to track software development and maintenance of software systems. For that reason, the IT PMO uses Jira Tempo to represent true projects. USAC typically has 35 to 70 projects in flight at any given time, and we would need assistance in populating the new PPM system with all in-flight projects and their associated data and attributes. Currently, there are 234 projects in JIRA, and 400 open accounts in Tempo. USAC would prefer to migrate all current projects and project-level demands, but would be willing to re-evaluate this requirement if it is cost-prohibitive
7	How many licenses will be needed for the PPM Tool?	50 licenses at launch.

8	Is interfacing to Enterprise Architecture components needed?	USAC previously engaged Enterprise Architecture team, and at this time, interfacing with EA components are not a requirement of this solicitation. Tools EA uses are: LucidCharts and standard MS Office applications. USAC keeps knowledge management in Confluence on premises.
9	Are hybrid portfolios of Agile projects going to be mixed with current projects in MS Project?	All projects have a WBS/schedule, including Agile projects Agile is the methodology for the software development for most teams, but the project management, planning and initiation is scheduled using WBS/Gantt charts. The PPM tool will need to be able to handle these instances.
10	The tool will have no system info, no PII and no budgets?	The PPM tool will not store system data or PII. All USAC confidential information will be stored on Confluence. It would be advantageous if the PPM Tool could house links to the information on Confluence. From a budget perspective, the main driver of USAC project cost is resources, and the tool should have the ability to cost resources using blended rates. As USAC matures, it would be ideal to be able to create and track to a budget of capital and operating expenses.
11	Is the preference for on premises or in the cloud?	USAC has a strong preference for a cloud solution, but is open to all solutions.
12	Is there an approach used currently to prioritize projects and what is that based on?	USAC prioritizes projects based on value, time and resources. The value model considers two factors – the project type and the project impact. Each factor is scored from 1 to 5, and the value model is computed as a weighted average. The value model provides a starting point for qualitative conversations regarding the value and prioritization of that particular demand or project in comparison to the entire portfolio of IT projects.
13	For ‘what if’ scenarios, does the tool need to maintain the prioritization of in flight projects under outside pressure?	From a dynamic ‘what if’ modeling perspective, the tool should be able to stack up demands that come in, score them by the value model mentioned in Question #13, and then factor in scenarios relating to time, resource capacity, and adding and removing projects and demands. to optimize value and resource management.

14	What types of confidential material will be stored in the PPM tool's environment?	No confidential material will be in the tool's environment. Confidential information is stored in Confluence. Ideally, the tool will have embedded links to Confluence.
15	Are project demands from business users or only the IT group?	Demands for projects can originate from anyone across USAC. There is a workflow in Jira that allows anyone to submit demands that are triaged to determine if they need to become a project (versus becoming a backlog story for the development team to address separately). Projects are then entered into the PPM tool.
16	Are the 50 users named or concurrent?	The users are named and the tool needs to be integrated with Okta.
17	Are the power users part of the 50 users or in addition?	The power users are included in the 50 user requirement.
18	Can USAC broadly explain what is needed in terms of alignment with strategic direction, mitigating technical debt, and maximizing scalability/adaptability?	As part of its ongoing organizational maturation, USAC has been emphasizing the concept of transparency as well as information and data-based decision making. A key tenet is ensuring that information is presented in a consistent manner, regardless of team, to aid leadership decision making.
19	Would USAC be open to a multi-year contract?	USAC will consider a multi-year contract. Exceptions to the T&Cs need to be submitted in the Offeror's proposal as instructed in Section E of the RFP.
20	What changes were made to the RFP that was posted in March 2023 versus the prior RFP posted in November 2022?	The RFP was revised to include additional information on the requirements of the PPM tool and to make the RFP clearer. Please use the RFP, and associated amendments, posted March 9, 2023, as the authoritative source.
21	Is this a LPTA type of award?	No, USAC is seeking a tool that is the best value to USAC and while price is a determining factor, the tool will not be chosen based solely on the lowest price but technically acceptable option.
22	How many Jira instances will we be required to integrate with the proposed PPM tool?	We are looking to the vendor to integrate the PPM tool with 2 Jira instances - the Test and Prod environments of the PPM tool with the Test and Prod environments of Jira.

23	What Agile framework do you use (SCRUM, SAFe, etc.)?	USAC IT uses a hybrid project management approach. Once execution begins, teams use SCRUM or Kanban depending on the needs of the project.
24	<p>Section 6, Scope of the Services and Deliverables, Sub-section E (Users), Page 10</p> <p>"This section of the revised Request for Proposal (RFP) states that the, ""Initial implementation anticipates the following user structure: Regular user (will perform general functions of the PPM tool) – Initially about 50 users; and Super user (will make changes to workflows, etc. when needed) – About 5 users"". Can USAC further delineate the users? What is the breakdown of user roles across the 50 Regular users? For example, will the user base consist of 5 Executives, 10 Project Portfolio Managers, 11 Business Analysts, 2 super administrators, etc and 5 Super Users, or will the Regular user base consist of 50 Project Portfolio Management Users and 5 Super Users? "</p>	USAC is seeking 50 total licenses of which 5 will be super users who can configure and administer the tool. 22 members of the IT PMO and Product Management departments will require access to the full tool functionality in order to manage portfolios, demands, and projects. In addition, 28 functional leaders will need to view dashboards and reports and manage resources.
25	Would this contract require contractors' key personnel to work in USAC's office 2 days per week?	USAC is comfortable with a remote work environment as long as the contractor agrees to be available in person for key meetings (including project kickoff) and reviews as mutually agreed.
27	We could not attend the Bidder's Conference on March 16, 2023 at 11am due to a scheduling conflict. Was this conference recorded and, if so, can it be made available for those who could not attend?	The material from bidder's conference will be posted online, but USAC will not provide any recorded material.
28	If any work is performed remotely, can access to USAC network be provided as well as that specified for on-site work under paragraph 4D?	USAC will provide vendor with the appropriate network access in order for the scope of work to be performed whether the vendor is on site or remote. How that access is provided will depend on what access is required. In the event that VPN into the network is required, USAC will furnish laptops.

29	Related to 4D, some of our customers provide laptops to primary POCs that are connected to their network. Our personnel are issued CAC cards and can connect in a secure manner remotely in performance of their duties. Is this arrangement possible for remote work?	Please see answer to question 28.
30	Paragraph 6A notes the current workflow. Is it acceptable to recommend a solution in deploying a more efficient and persistent manner of capturing JIRA and integrating with Temp data, given that JIRA and Confluence are necessary systems of record, that will displace Tableau?	The IT PMO is open to solutions that improve our ability to leverage Jira and the data relationships that have been established while improving the efficiency of the workflow and data capture.
31	Does USAC want a systemic means of extending JIRA Risk functionality? Would proposing a more robust risk analysis capability be acceptable as part of the proposal?	The IT PMO uses a plug in called Risk Register Version 6.2.12 by ProjectBalm for risk management. USAC is open to exploring options for enhanced risk analysis capability.
32	Is USAC using an additional scheduling application (such as MSP or P6) to provide a critical path analysis of its portfolio of projects, that would also provide additional insight into project and portfolio performance, risk, resources, and trade-offs?	USAC uses MS Project for project scheduling. Currently, all portfolio management is conducted manually using Jira Structure and Excel extracts.
33	Does USAC want to capture prior data for current projects? If so, how many current projects does USAC have?	Please see answer to question 6.
34	Paragraph 6B succinctly describes the PPM solution and its required capabilities, the following questions are: a. Does USAC prefer to self-host or to have a Cloud solution, or provide information and pricing on both options? b. What other non-software development projects does USAC have that will be included under the PPM scope? What is the complexity (dollar value, data requirements, systems of record, etc.) for these projects?	A. USAC has a strong preference for a cloud solution but is open to all solutions. B. Besides software development projects, USAC IT also manages infrastructure and COTS implementation projects. These projects tend to utilize a waterfall project management approach and will have the same data attributes and management requirements as other IT projects. Those requirements are outlined in Attachment 2 (PPM Fit Gap Requirements.)

	What management requirements are used in tracking the performance of these other projects (i.e., EVM, etc.)?	
35	The Attachment 3 use cases referred to in paragraph 6.C, page 9 of 62 of the RFP could not be found in the document. Was this simply an oversight or do you plan on providing use cases as noted in the paragraph?	Attachment 3 is posted as a separate document. See USAC website Procurement Page.
36	Paragraph E refers to “initial implementation” of 50 regular users and 5 super users. What are the potential numbers of users for the organization? This will assist in crafting a price proposal that steps to full implementation, with the option for an organizational FFP and M&S in the out-years	IT foresees that other divisions within USAC may at some point desire the use of a PPM Tool so the tool should be scalable to accommodate that situation should it arise, but currently there are no immediate plans for other divisions outside IT to utilize this tool.
37	Paragraph G lists professional services. Usually, we provide this type of service as FFP as service as a product. Is that model acceptable to USAC?	USAC is seeking a proposal for licensing and a Firm Fixed Price (FFP) proposal for services required to implement and configure the tool. USAC just requires the breakdown per Attachment 1 – Bid Sheet for information purposes. Offerors may propose additional pricing alternative for USAC review.
38	Paragraph 7 “Key Personnel” notes that USAC would like to get to know about our team by name, but some key personnel may not be available until after award. This is normal practice for small business. Does USAC have this flexibility or must we have all personnel identified in our RFP submission?	Individuals noted as Key Personnel in the RFP should be named as part of the RFP submission.
39	Paragraph 3 of Section C notes the terms of delivery and acceptance. The FFP nature of the contract consists of COTS software and services (which are services as a product in lieu of professional services). Given that the work is not level-loaded and non-severable. Will USAC accept alternative wording or does it already possess alternative working that better fits the anticipated FFP nature of the contract?	USAC requires pricing per RFP Attachment 1 – Bid Sheet. Offerors may propose additional pricing alternative for USAC review. In your response/proposal, please use redlines to provide alternative language for USAC’s review

40	Paragraph 6 of Section C relates to invoices, with the boilerplate conflicting with the scope and pricing of the RFP as with the statement above. Will USAC accept alternate wording in this clause to better fit what is acquired?	In your response/proposal, please use redlines to provide alternative language for USAC's review. As part of Attachment 1 – Bid Sheet, USAC requires offerors to submit an invoice schedule that will be incorporated into the contract.
41	Paragraph 7 of Section C relates to fees. Is USAC tax-exempt?	USAC is not tax exempt
42	Paragraph 23 of Section C using OKTA. Does USAC use CAC to align with Okta? In that regard, given that Okta is primarily for SSO to web apps, does USAC employ Active Directory and/or Windows Authentication?	USAC employs Active Directory and Okta for user provisioning and access.
43	Paragraph 23 of Section C referring to FedRamp would obviously only relate to a Cloud solution. Does USAC also have requirements for NIST 800-171, CMMC 2.0, or IL4 or greater?	The terms and conditions have been updated to specify that FedRAMP is not required but preferred. In lieu of FedRAMP certification, we are seeking one of the following certifications - SOC 2 Type II report with a focus on Security, Availability and Privacy Trust Services; ISO 27001; or CSA STAR Level 2.
44	While the RFP specifies COTS software, paragraph 23 of Section C, Proprietary Rights, is expansive in nature and doesn't take into account the intellectual property rights that are intrinsic to the COTS intent of the solicitation. Will you accept consideration of alternative wording?	In your response/proposal, please use redlines to provide alternative language for USAC's review.
45	Paragraph 25 of Section C notes no flexibility in Key Personnel during the term. Usually this is understandable. Will USAC accept alternative wording to this provision, given the USAC will approve Key Personnel in any case?	Offerors may propose edits to these terms for USAC review.
46	What Cloud Platform does USAC support? i.e.: AWS or GCP	AWS, Azure, and Appian – though USAC seeks a SaaS solution
47	What version of Jira is USAC running?	Jira v9.2.0