



City of Tacoma

Questions and Answers

ADVANCED DISTRIBUTION MANAGEMENT SYSTEM (ADMS)

PROGRAM MANAGEMENT AND ORGANIZATIONAL CHANGE MANAGEMENT

RFP Specification No. **PI23-0149F**

All interested parties had the opportunity to submit questions in writing by email to Brandon Snow, Senior Buyer by date questions were due. The answers to the questions received are provided below and posted to the City's website at www.TacomaPurchasing.org. Navigate to [Current Contracting Opportunities / Services Solicitations](#), and then click *Questions and Answers* for this Specification. This information IS NOT considered an addendum. Respondents should consider this information when submitting their proposals.

1. Question: ADMS Program Manager role. Is there a location preference for this position?

Answer: Strong preference to a local resource, as this role will be hybrid (remote and onsite). The distribution of onsite/offsite time will vary based upon project activities, but generally the expectation is 1-2 days a week onsite.

2. Question: Program Management position/portion of the RFP: As a staff augmentation supplier how many ADMS Program Manager profiles would we be expected to provide? Is there a limit to how many profiles we can submit?

Answer: No more than 3 resumes for potential Program Managers.

3. Question: Program Management position/portion of the RFP: Is the expectation that we are to submit a Program Manager or Program Managers on 4/23 for TPU to select for the project solely based upon our response/submission? OR upon being awarded the contract would we then work directly with the team at TPU on providing and securing this Program Manager allowing them the opportunity to interview our candidates before making a decision

Answer: Provide the potential candidates as part of the response.

4. Question: Program Management position/portion of the RFP: Will the Program Manager be required to work on-site in Tacoma for the duration of the project? Is remote work allowed? Hybrid schedule

Answer: Please see answer to question No. 1



City of Tacoma

Questions and Answers

- 5. Question: Program Management position/portion of the RFP: If the Program Manager is required to work on-site in Tacoma and are not local, will TPU pay for travel expenses**

Answer: If the proposed candidates require travel, please adjust rates and prices in the response accordingly.

- 6. Question: Will successful bidders for P123-0149F (ADMS Prog Mgt & OCM) also be able to participate in the expected forthcoming ADMS Systems Integration RFP?**

Answer: No.

- 7. Question: Regarding the RFP instructions specifying a maximum of 10 pages double-sided or 20 pages total, excluding required forms or resumes, could you clarify if this page limit applies individually to each scope (PM and OCM) or collectively to both scopes? If we are proposing on both scopes, do we submit separate proposals for each**

Answer: The limit applies to each proposed scope of work. Please submit a single proposal with both scopes.

- 8. Question: Pg. 9 of the RFP, it mentions ' OCM resources that are a part of this project must have NERC Certified System Operators, familiar with Distribution Operations. With regards to NERC certification, is it mandatory for all members of the OCM team to possess this certification? If so, what is the rationale behind this requirement? Can you share more about the requirement/certification, related to external vendors, or is it specific to internal OCM resources within the Tacoma Power Transmission and Distribution department?**

Answer: The system operations dispatcher resources in Tacoma Power T&D System Operations are limited and are very stretched. To mitigate and to facilitate a higher level of understanding between the dispatchers and the organizational change management vendor, Tacoma is requesting that the OCM team has team members that have been [NERC Certified](#) and/or have previous system operations dispatch experience.

- 9. Question: In lieu of the NERC System Operator certification, what dispatch workflow experience is sufficient to satisfy this requirement?**

Answer: Yes. We are looking for experience managing field crews from an Operations Control Center during planned and unplanned outage events during Real Time operations.

- 10. Question: Section 1.1.1. outlines a full-time commitment (40-hour work week) for the Program Manager overseeing the ADMS program and its associated workstreams. Could you provide insight into the expected distribution percentage of onsite versus offsite time for the Program Manager**

Answer: Please see answer to question No. 1.



City of Tacoma

Questions and Answers

11. Question: Because the proposal is to be submitted electronically, is the use of DocuSign acceptable for providing ink signatures

Answer: Proposers should sign all specification documents requiring signatures in accordance with their standard business practices and by an authority authorized to contractually bind the company.

12. Question: Is there anything we needed to submit to be considered as a vendor? We are putting together a response to this RFP and reading through it I didn't see any site for vendor registration besides the "Bid Holders List".

Answer: Vendor registration is not required for submittals.

13. Question: As per the RFP, the schedule for Q1.2024-2026 spans over 30 months. Additionally, the RFP schedule is anticipated to be awarded post the city council meeting in October. Could you please provide clarification regarding the start time of the schedule?

Answer: It is anticipated this contract will require approval of the TPU Public Utility Board. Both the Program Manager and the OCM team will start as soon as the contract has been negotiated and signed. We expect these resources to begin around November 2024.

14. Question: Could you please clarify whether resumes are included in the page limit? Section 10 states, "Submittals should be limited to a maximum of 10 pages, double-sided, or 20 pages total, excluding any required forms or resumes," while Section 10.2 states, "Biographies and resume materials will be included in the page limitation."

Answer: Resumes are excluded from the page limit. Additionally, each scope of work can separately be up to 10 pages.

15. Question: Is/are the vendor(s) selected for the scope of this RFP able to respond to the OMS SI RFP?

Answer: Please see answer to question No. 6.

16. Question: Is the OCM work during ADMS Phase 1 Stabilization in-scope or out-of-scope for this RFP?

Answer: The work is in scope.



Questions and Answers

17. Question: Phase 2 is not shown on the graphic on page 7 but is cited on the services matrix on page 10. Can you confirm Phase 2 is for DSCADA and or any specificity of what Phase 2 entails?

Answer: DSCADA and Advanced DMS is Phase 2. Final scope and work for Phase 2 and 3 will be determined at a future time. Please do not provide estimates for Phase 2 or 3 in your response.

18. Question: Can you clarify the roadmap start and end dates for Phase 2?

Answer: We do not have clarity on the start and end date for Phase 2. Please keep your responses for Phase 0 and Phase 1 only.

19. Question: Can you provide specifics in terms of systems that integrate with OMS, their vendor/vintage/version to better estimate Level 4 process design effort?

Answer: This information will be provided during the As-Is assessment.

20. Question: Do you anticipate a fixed cost to be inclusive of expenses and/or contingency?

Answer: No for both.

21. Question: Tacoma Public Utilities (TPU) Request for Proposal (RFP) P123-0149F defines the Program Manager as a 40-hour a week position. Can TPU provide an estimate on the average weekly workload for the Organizational Change Management (OCM) role?

Answer: This will vary depending on the task. During Business Process design, more hours may be needed than later when it is primarily communication work.

22. Question: TPU RFP P123-0149F states that the Advanced Distribution Management System (ADMS) Program is expected to run from Q1 2024 to Q2 2026 (approximately 30 months) but that approval for the work described in this RFP is not expected to occur until October 2024. For pricing purposes, can TPU please identify number of months that the Program Manager and OCM services are required?

Answer: We believe the engagement will take 30 months starting when the resources begin.



Questions and Answers

23. Question: TPU has identified this engagement as a fixed-bid contract and stipulated that all reimbursable travel expenses are to be included in the total amount of the contract. Approximately what percentage of the ADMS Program Manager and Lead Consultant/OCM Resource work does TPU expect to be performed onsite, respectively?

Answer: See Question No. 1 for the answer in regard to the Program Manager. For OCM resources, we would prefer a resource to be able to come onsite for the Business Process mapping portion but will consider remote-only resource. For communications, remote-only is fine. For training, we expect trainer to be able to be onsite. OCM Lead may be remote or hybrid.

24. Question: TPU has identified this engagement as a fixed-bid contract and stipulated that all reimbursable travel expenses are to be included in the total amount of the contract. Would TPU consider accepting a submission that was Time and Material based, with estimated hours and rates?

Answer: No. We expect fixed bid only. We can modify contracts with change requests if needed.

25. Question: The RFP states that the Program Manager is responsible for vendor selection, contracting, and management and the OCM role description indicates that there could be multiple ADMS vendors. Has TPU selected an ADMS vendor or System Integrator, or will the Program Manager or Lead Consultant/OCM Resource be responsible for assisting with the selection of an ADMS software vendor or System Integrator?

Answer: The ADMS vendor has been selected. We will utilize the Program Manager for assisting with vendor selection for any vendors that are chosen after the Program Manager has started. We do not expect the OCM vendor to contribute to vendor selection.

26. Question: Is there an opportunity to get a meeting or conversation with the issuing team before submitting our response?

Answer: There is no pre-proposal meeting scheduled for this RFP.

27. Question: Is there an incumbent or preferred provider that has supported similar work in the past?

Answer: No.



Questions and Answers

28. Question: The RFP is setup in a way that separates the Program Manager and Organizational Change Manager, would TPU accept a proposal that included a more comprehensive team approach to the work and pricing instead of focusing on individual people?

Answer: Yes, please bid as indicated in the contract and provide an alternate proposal to be considered during the contracting phase.

29. Question: Will TPU have individual project managers for the individual workstreams? (OMS/DMS Workstream & ORCAS Workstreams & Historian Workstream & EMS Refresh)

Answer: Yes

30. Question: Are there internal Change Management practitioners or other employees who could support change management efforts internally?

Answer: The project team will coordinate with the OCM vendor to help target the appropriate stake holders, but the OCM team is responsible for developing the communications. T&D does not have an internal communications team.

31. Question: Does TPU have an internal Communications team to support communication deliverables? If so, how would they be able to partner to support this effort?

Answer: Please see answer to question No. 30.

32. Question: How many users are required to be trained? (and of which type? I.e. instructor-led, web-based)

Answer: For System Operations, there will be 30 trainees (26 System Operators and 4 EMS Engineers). Live training for the System Operators will need to be delivered in multiple sessions due to rotating shiftwork. It will need to be delivered during our Day Shift (0630 to 1430.) Instructor led vs web based will be determined by course content. Any simulation and hands on application training is expected to be accomplished on-site at Tacoma Power.

33. Question: How many training sessions are expected? (In person, or remote?)

Answer: We want to see an expected approach from the OCM vendor.

34. Question: Is the expectation that all of the training for operators conducted during the dayshift?

Answer: Please see answer to question No. 32.



City of Tacoma

Questions and Answers

35. Question: What facilities are available for training?

Answer: We have on-site facilities for training. Tacoma will provide rooms and equipment as needed.

36. Question: Please explain the rationale for having OCM requirement for NERC certification.

Answer: Please see answer to question No. 8.

37. Question: How many employees are in each of these groups?

Answer: Please see answer to question No. 32.

38. Question: In general, are each of the above groups impacted by each program workstream?

Answer: ORCAS will impact Sys Ops. Historian and EMS Upgrade will impact Sys Ops, Power Mgmt, and Sys Planning.

39. Question: The RFP timeline states that the consultant cannot start work until after Council approval in Oct 2024. It also says that the program timeline is approximately 30 months from Q1 2024 to Q2 2026. The timeline diagram on p.7 shows significant activity in Q1-Q3 2024, prior to onboarding the successful Program Management/OCM bidder. Is this vendor-only activity, or is a Tacoma Power resource serving as interim Program Manager for this period?

Answer: Internal resources are acting as a Program Manager, but much of the work displayed on the timeline for Q1 relates to creation and publication of this RFP and other, related, RFPs.

40. Question: When the consultant Program Manager starts in Q4 2024 (presumably October/November timeframe), what steps will Tacoma Power take to ensure a successful handover of knowledge and accountability from whoever has served in the role in the interim? Will an interim overall program budget and schedule already be in place by this stage?

Answer: Tacoma Power will provide appropriate resources to give the Program Manager contractor the information and context needed to provide the service. The Program Manager will continue to have direct support from the sponsor, PMO and other SMEs after onboarding to make sure they are successful. There will already be interim budget and timelines for the Program Manager to start with.



City of Tacoma

Questions and Answers

41. Question: Pg.9 (PgM scope) refers to the ADMS Program RACI, while Appendix C refers to the ADMS Program RACI as being posted at www.TacomaPurchasing.org. We don't see any relevant documentation there except the solicitation. Can you please provide a direct link to the RACI document?

Answer: We have fixed this and made the RACI available on our RFP site.

42. Question: The RFP says bidders can bid on the Program Manager scope, the OCM scope, or both scopes. If we bid on both, will each part of our proposal *also* be treated as a separate bid for each individual scope (for example can we still be awarded one scope if we're unsuccessful in winning both parts)? Or would Tacoma Power prefer that we submit separate bid packages for the individual scope/s of interest, plus another for an integrated approach covering both scopes?

Answer: Please only submit a single proposal, but make sure to clearly separate the work items and expenses for each scope as Tacoma reserves the right to offer a contract for only one part of the proposal.

43. Question: If we're presenting a single bid package for both scopes, does Tacoma Power have a preference on the structure of that package, for example including a full duplication of identical sections (5) Sustainability and (6) Equity in Contracting with each scope, vs a single section 5/6 applying to both scopes? This is particularly important given the 20-page limit.

Answer: Do not duplicate identical sections. Please submit a single proposal with only one version of duplicate sections.

44. Question: This RFP has comprehensive requirements to be contained within a 20-page response, particularly if respondents are bidding for both scopes and thus must have separate sections 1-4 for each one. The RFP is also contradictory as to whether resumes are *excluded* from the page count (as stated on p.20, sec 10) or *included* (as stated on p.21, sec 10.2). Can Tacoma Power please clarify how resumes/bios should be treated (we respectfully ask that they be *excluded* from the page count), and consider permitting additional pages if responding to both scopes in one document (e.g., 30 pages total, excluding resumes)?

Answer: Please see answer to question No. 14.

45. What is a realistic start date for the Program Manager?

Answer: We believe a realistic start is November 2024.



City of Tacoma

Questions and Answers

46. Question: Is this role fully remote? Or is it fully onsite? Or is it a hybrid role, with some time onsite and some work remote? If hybrid role, expected percentages for onsite and remote?

Answer: Please see answer to question No. 1.

47. Question: Does the program manager need to live locally in Washington?

Answer: Not necessarily, but please see answer to question No. 1.

48. Question: If the candidate does not live locally in Washington area, and needs to travel, will actual and approved travel expenses be covered?

Answer: Yes. However, the cost of these expenses will be considered while scoring.

49. Question: Is there a citizenship requirement for the program manager role? As an example, only US citizens or green cards?

Answer: No.

50. Question: Is the estimated total of 20 processes required in the OCM deliverables for levels 3 and 4 combined, or do you anticipate 20 processes for each level 3 and 20 processes for level 4?

Answer: We believe there will be 20 processes for each level 3 and level 4 flow.

51. Question: Within your training plan, do you intend for trainers to participate in project training delivery, covering both train the trainer and train the end users and super users?

Answer: Yes.

52. Question: Once developed, what system are you considering for storing your training materials?

Answer: Quality Training Systems QTD is used for Individual Learning Activity (ILA) creation, training plan development, scheduling and tracking. This includes Task List development and maintenance. We are a NERC Level 3 CE Provider. Source Training (<https://source.training/landing/index.html>) is utilized for online training presentation development, delivery, and storage. We will be able to provide access to the platform (for this project only) for the successful vendor.



City of Tacoma

Questions and Answers

53. Question: Are you expecting in-person, virtual, or hybrid training courses?

Answer: Likely a combination, but for some groups in person will be required. See Question 32.

54. Question: Do you have an estimated range of impact for training, in terms of the number of current users?

Answer: Please see answer to question No. 32.

55. Question: Do you expect the OCM team to create UAT scripts from the vendor's functional test scripts? If so, what measures have been implemented to ensure full scope of the identified processes?

Answer: Yes. The OCM vendor will be given direct access to the software vendor to ask questions and get support. Tacoma will also provide support via Project Managers to enable facilitation between the OCM vendor and the software vendor, and Solutions Integrator.

56. Question: Will there be a test environment provided to enhance retention through practice? How many environments will be made available for testing and training, and will they be shared?

Answer: We will have a simulated environment created for the OMS upgrade for users to be trained on and for practice.

57. Question: Will dedicated business resources be allocated to the project to serve as SMEs throughout the duration of the work? If so, how many resources do you anticipate committing to this work, and from which areas?

Answer: resources will be assigned to the project to serve as SME's. Given the overall length of the project and incremental phases, the number of resources from each area will vary. Resources include but are not limited to the following areas: System Operations (Operations Leadership, Distribution Operators, Operations Training, Technical Liaison, EMS/SCADA Engineers), System Planning (Planning Engineers). Technical engineers will be available from our Utility Technology Systems team to assist with technical installation and application support. Note that these resources have additional responsibilities that will need to be carried out throughout project implementation. None of these resources will be 100% dedicated solely to this project.