

CMU 2817
Colorado Mesa University Campus Service Desk Solution RFP
Addendum #1
September 20, 2024

1. What is the anticipated budget for the licensing of the new adopted platform?

The University does not have an established budget for the project; the University is interested in learning if a shared platform option will assist in aligning annual costs for one solution rather than licensing costs for two products. If this solicitation does not yield the opportunity for a combined platform, CMU will review pricing associated with the individual platforms proposed.

2. What is the anticipated budget for the implementation of the new adopted platform over the initial period [i.e. not including maintenance support costs].

As indicated in response to #1; there is not a set budget for the implementation of a new platform. The University relies on the prospective Offerors to come forward with their best pricing to achieve the goals as outlined in the RFP.

3. How many ITSM agents do you currently have? Do they support the entire student population?

50 ITSM agents. This covers all of CMU's Information Technology department including student workers at the help desk (enterprise software, networking, computer support, telecommunications, classroom AV systems, and help desk) plus CMU's Distance Education department of Instructional Designers that supports our learning management system. The agents support students, faculty and staff.

4. How many CMMS/FS agents do you currently have? Do they support the entire student population?

75 CMMS/FS agents use MaintenanceDirect today. They support the entire student population as well as staff and faculty.

5. Is asset information stored in any other locations than the DHCP server?

The primary location for Information Technology asset data is in Web Help Desk application today. The data is stored in an on-premises MySQL server. Only select fields are shared with the DHCP server such as device type.

6. Can you speak further to the concerns of keeping ITSM data separate from FS? Particularly elaborate on security needs between the two groups for keeping asset information separate.

CMU is looking for a solution where ITSM data and FS data can only be viewed, queried and modified by authorized individuals. For example, IT data should be viewable by custodial team members, and IT staff should not be able to view and modify FS tickets and inventories. Data could be stored in the same database as long as access to fields can be controlled by security permissions based on roles.

7. What other CMU applications need to be integrated with the proposed platform during the initial implementation [page 21]?

None that we are aware of, please refer to Appendix A: The University's Technology Environment for a list of related CMU applications.

8. How critical is the need for a GIS system as described?

GIS is not critical for the solution. Rather, if the capability is already incorporated into the proposed existing platform, FS is interested in knowing more about that component.

9. If at the end of this process, if we are not fortunate enough to be awarded by CMU, would you or your designate(s) be willing to have a 10-15 minute conversation to gain feedback as to why Windward was not selected?

Proposal tabulations can be provided upon request to help firms understand where their proposals fell short in short-list selection. Firms engaged through interview will have additional tabulated scoring which illustrates the relative strengths of participating vendors; short debrief conversations have previously been scheduled with unsuccessful firms for similar solicitations.

10. How many workflows across IT and FS have at least some automation today?

IT has at least 10 workflows and FS has 2 workflows that create/update/close tickets.

11. Please confirm whether CMU has an existing Asset Management system or should the proposed Service Desk solution implement these features,

IT maintains an asset database within its existing ticketing system. This system does not manage the assets at all. We utilize MECM to manage endpoints, image and deploy software to those endpoints as well. I would like for the new solution to track system specs and software installed on endpoints and am interested in anything else that a new system can offer in this regard.

12. Does CMU leverage any Configuration Management System (AKA Configuration Management Database) today? If so, would its maturity best be described as low, moderate, or high?

Yes, we do have Configuration Management for Windows computers and Apple computers. The University considers them highly mature.

13. Are ticket templates used today for IT and/or FS? If so, about how many templates exist?

FS currently has four ticket templates in use for maintenance requests.

IT currently has 33 ticket types, each with 1 or more subtypes. As much of each ticket is setup as possible to minimize the amount of data entry. Ticket types also tie into instructions and help suggestions that appear in the ticket to help the user prior to submission.

14. Does CMU have an online "services catalog" today for IT and/or FS services? If so, how many orderable services are available?

CMU's current FS/CMMS solution offers a catalog of 293 services from which users may select. IT currently does not make use of a services catalog; however, we are interested in the concept to see how it would benefit us moving forward.

15. How many IT and FS teams are configured in the current ticketing systems, apart from the Service Desk?

FS currently has nine groups configured in the CMMS. IT currently has 8 'Tech groups' in our ticketing system.

16. Beyond what was shared in the RFP and pre-proposal conference, are there any other challenges and/or reasons for moving off of your current solution? Please specify.

From the IT perspective, the current tool is very immature in terms of ITSM principles. There are numerous things lacking in the product we currently uses and we want to modernize our approach to incorporate ITIL best practices, and offer flexibility and customization based on our needs.

17. How many named users do you expect to have working "tickets" in your new solution?

125 named users. All IT staff will need access to the software, as well as student works. We currently have a 50-seat license. FS currently has 75 users for trades and custodial staff.

18. Do you currently have a set of KPIs (Balanced Scorecard that your rollout will adhere to)? If not, are you open to us suggesting these KPIs as a best practice for continuous improvement in our process and/or governance/roadmap phase?

The University does not currently have a set of KPIs for IT and FS. The University is interested in developing metrics, best practices to measure and promote continuous improvement.

19. Is CMU open to an Agile / DevOps model that works in two (2) week sprints?

Yes. The University has been working with more and more software vendors that use Agile framework. Offerors should describe their approach with their submitted proposal.

20. Does CMU expect a need for historical data to be migrated from legacy/other systems? Is there any idea on the type and volume of data needed to be migrated?

If possible and not cost-prohibitive, FS has historical data to migrate to the new system. CMU will work with the recommended approach put forth by the successful Offeror.

If historical ticket data can be used to help build the AI, then yes we have a lot of ticket data, but would be interested in knowing the best approach to incorporating this data.

All IT asset records would need to be migrated to the new system. Currently have about 10,800 asset records.

21. It is assumed that CMU will run and own User Acceptance Testing (UAT) testing (test planning, test script creation, test results). Is this a fair assumption? If not, what kind of support is CMU looking for to complete UAT?

Yes, however CMU is looking for the vendor to provide us the best methodology for testing the proposed and validating the proposed solution.

22. Are there specific types of training or organizational change management (OCM) requirements that CMU prefers (e.g., train the trainer, job aids, communication plans, banners, etc.)?

CMU has no specific requirements for training or change management and is looking for vendor provided recommendations for successful implementation.

23. Is CMU comfortable with out of box (OOB) portal creation aligned with CMU branding / styles? Or, is CMU looking for a more custom UX/UI experience?

IT/FS desires the ability to customize technician views of tickets and assets.

24. Are there any mobile device requirements?

Section 2 Background, Overview and Goals states “A mobile-friendly solution is critical to both users and technicians,...”, Section 3 Statement of Work requests the description of the offering of a mobile interface...”. Closely review the RFP for requirements.

25. The RFP mentions a requirement for APIs to onboarding, technology, asset management, and inventory solutions. Can CMU please specify which systems it seeks to integrate with their new solution?
- Are they on premise or SaaS?
 - What type of data do you expect to exchange with the proposed solution? (type, format)
 - Can you please specify if the integrations are to be uni or bi-directional?
 - Do you know if the systems to be integrated have open APIs available for integration purposes?

Please see integration section on page 21, 22 of the RFP and Appendix A: The University’s Technology Environment for application information. They are all SaaS applications except for the HPE/Aruba Clearpass software. All integrations are uni-directional and are automated flat-file. The University prefers API integrations when available.

26. At this time, are there language requirements outside of English?

Yes, but on a small scale. Some members of the FS team are primarily Spanish-speaking. Having a Spanish-language and interface and training materials would be helpful but is not a must-have capability.

27. What is the expected duration of vendor provided support post go-live?

CMU believes this is dependent on the project implementation and change management methodology proposed by the Vendor. Once fully implemented the University expects to be supported by maintenance agreement.

28. Please describe CMU's planned governance structure for status, decisions, escalation, visibility, etc?

CMU's executive sponsors will be the VP for Information Technology and VP of Capital Planning, Sustainability and Operations and will oversee the project and be responsible for strategic decisions and resolving any items that need escalation to the leadership level. The Associate Director for Computer Support Service and Facility Service Business Manager will be the PMs for the project and involved in functional decisions.

29. Will CMU dedicate a project management resource or is the vendor expected to provide a FT PM?

CMU will assign a project manager(s) to coordinate CMU resources and tasks. Please see question 28. CMU expects the vendor to provide a project manager to support the project to coordinate vendor resources and tasks, meet deliverables and to deliver the solution.

30. Has CMU participated in any Service Desk solution vendor or partner presentations in the last 12 months? If yes, who was the vendor or partner?

This solicitation is the first formal engagement for the University for a Service Desk solution.

31. Has CMU received a budgetary price quote from a vendor or partner for a Service Desk solution in the last 12 months. If so, which vendor or partner provided proposed pricing?

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32. Does CMU have an approved budget for this effort? If yes, can CMU share general guidance on their expected budget for this effort?

See responses to questions 1 and 2.

33. Can our proposed pricing assume that all work will be completed remotely?

Yes, if the solution can be successfully completed remotely. Most Vendor software implementations of recent years have been completed for the University remotely.

34. Can Contractor's project team include resources that are not based in the United States?

Yes. Please clarify with your response that they would be available during University working hours in Mountain Time.

35. We understand IT and Facilities are the two main user groups for a new solution, and that these two groups need 50 users and 75 users, respectively. In the Prebid meeting call, we heard that there may be additional users groups that may be looking for a new ticketing solution after phase 1 implementation. Can you expand on who these groups are and what the potential user count may be?

For responding to the RFP, please price for IT and FS use cases and users. Please provide per user costs for adding technician/user. Distance Education has 5 individuals that use the IT help desk software for ease of communicating technology support issues, but the University foresees further tailoring of service desk software for this department. Other areas that potentially would benefit in the future from using a service desk application would be Parking Services, three users; Educational Access Services, five users; and Library services, fifteen users.

36. In addition to completing your pricing form in the RFP, are we able to provide an additional pricing exhibit to ensure we clearly show our full offering which may include optional items for you to consider?

Yes. This is encouraged although the RFP price evaluation process will be on the core RFP requirements.

37. What asset database software is the University currently using? Are you looking to keep this software or replace it?

The ITSM and FS databases are part of the SolarWinds Web Help Desk and MaintenanceDirect by Brightly, respectively. CMU would expect them to be replaced with the proposed solution.

38. With regard to Section 1, Part 23 in the RFP, we understand the Special Provisions are required. We have entered into agreements with other Colleges and Universities within the State of Colorado using the same Standard Contract with Special Provisions. These Colorado entities have accepted minor exceptions/modifications to the Special Provisions listed in section 20. May we share that agreed upon language in the Exceptions to Contract Terms within our RFP response, or will this disqualify our response?

Share all exceptions with the RFP responses.

39. How much historical data do you plan to migrate, and are there specific data fields that need to be preserved during migration?

IT: Yes, there are custom fields in our asset database that need be preserved and the built-in fields that we do use also need to migrate.

40. Does the new solution need to integrate with an existing asset management system, and if so, does it need to support real-time or batch updates from asset tracking tools?

CMU assumes the existing asset management systems will be replaced with the proposed solution.

41. How many concurrent users are expected to use the service desk system

This is a metric the University does not have. We estimate that out of the 125 IT and FS technicians/users that 75 may be concurrently logged in. We have no statistics on the number of concurrent customers logged in at any time.

42. What key performance indicators (KPIs) and metrics are you planning to track for IT and Facilities? Is integration with external reporting tools like PowerBI or Tableau necessary for advanced analytics?

See Question 18, KPI response. The University is currently expanding its use of PowerBI, especially in areas where analytics is based on data from disparate systems. The University is interested in embedded reporting and analytics within the campus service desk solution.

43. The RFP mentions tracking maintenance requests, preventative maintenance, and asset management for Facilities Services. Could you provide more detail on the specific functionalities required for Facilities? For example, should the system handle scheduling, asset condition tracking, and cost/labor reporting for maintenance tasks?

Current CMMS capabilities are very limited today, CMU is interested in all advanced functionality.

44. Does CMU have specific auditing or compliance requirements

No. The University expects user changes would be tracked for auditing purposes.

45. Do you expect the CMMS and IT Service Desk components to be fully integrated into a single platform, or is it acceptable for these to function as separate modules with distinct user interfaces?

The University will give priority to proposed solutions that can provide a unified service desk solution with an intuitive user interface. The University will review all options to determine if there is compelling reason for this approach to the project.

46. The RFP mentions mobile-friendly access for facilities staff. Can you specify what functionality is expected?

See response to question 24.

47. What specific metrics or reports do you expect from the CMMS

We have limited metrics and reports today, CMU is interested in learning what solutions have available.

48. The RFP references utility bill tracking, real-time metering, and cost/use analysis. Can you elaborate on the extent of the energy management requirements?

FS is interested in knowing more about these capabilities. Energy management is not critical, but desirable, for the solution, if the capability is already incorporated into the proposed existing platform.

49. Does CMU currently use any energy management systems or tools that need to be integrated? If so, can you provide details on the existing system and the specific integrations required?

CMU enters energy data into EnergyStar.gov and there are no integrations.

50. Will Vendors who offer both ITSM and CMMS rank higher in the evaluation?

The University will give preference to solutions that can provide both ITSM and CMMS capabilities that can be adopted University-wide.

51. If a vendor were to propose a solution for either ITSM only or CMMS only, how would these proposals be evaluated?

The evaluation process will take into consideration the needs of both IT and FS with preference given for a unified solution. If the Offeror demonstrates a compelling reason to review a dedicated ITSM or CMMS solution, the University will consider adopting two separate solutions.

52. Has the University participated in product demonstrations in the last 12 months? If so, which vendors did you see?

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53. Regarding Energy Management capabilities, How many facilities and utility accounts will be managed in the new system?

Please see response to question 48.

54. What is the total Square Footage of facilities that will be managed in the new system?

2,628,374

55. When was the last FCA conducted?

No official FCA has been conducted.

56. Is the University interested in additional services such as Facility Condition Assessment or Data Gathering for a turn-key implementation? If so, should vendors provide an estimated cost for such services and how will these be evaluated?

Yes, the University is interested in an FCA, include as an alternate when pricing the solution.

57. Regarding tracking (hardware, software, building assets), can you provide additional details on the level of tracking you are looking for?

FS tracks mechanical and electrical systems and subcomponents and supplies to be replaced by wear. IT tracks hardware equipment reference in response to question 60.

58. Are there any specific integrations you are looking for with the chosen platform?

Please see Integration questions on page 21/22 of the RFP and Appendix A: The University's Technology Environment for application information.

59. Since this platform will be extended to all students, how do you anticipate the students interacting with the tool?

Students will use the tool to submit tickets, view help documentation and knowledge bases, use self-service features, etc. Only student workers will use the tool in a 'technician' or 'trades' role to update tickets.

60. Regarding migration of existing assets information, what format is the information currently in?

IT assets are predominantly computers, tablets, computer peripherals, printers/plotters, point of sale, card readers/scanner, and classroom AV equipment, etc. Information includes device type, manufacturer, model, department owner, location, status. We can export from Web Help Desk in TSV or in an Excel workbook.

61. What ITSM and CMMS system are you currently using?

Please review the Project Overview paragraph, on page 12 of the RFP, under Section 2: Background, Overview, and Goals for a complete description.

62. On the pre-bid call, you had mentioned about energy usage tracking, could you expand on the best way you see this being used in your future environment? Also how do you currently track energy usage?

Energy usage is tracked through EnergyStar.gov

63. What requirements do you have around GIS?

See response to question 8.

64. Can you confirm which departments will be using the system? How many users in each department will need access to create/modify/view tickets?

For go-live, Information Technology, which includes Instructional Designers in Distance Education, and Facility Services. Please see response to question 17 for software agents.

65. How many request types (with unique workflows) do you currently have defined in your IT Service Catalog? What are the top 10 most frequently requested request types?

Please see response to question 10 for the number of workflows. The top 10 most frequently logged request types are 1) Access/Accounts/Passwords Resets (most self-service but auto-logged), 2) Computer Repair/Deploy, 3) Employee Check in/Check out, 4) Access/Accounts/Passwords Change/Update, 5) Telephone/Cabling, 6) Network Drive/File Storage, 7) Desire2Learn (learning management system), 8) Desire2Learn (instructor only) 9) Wi-Fi (connecting), 10) and Software Install.

66. How many request types (with unique workflows) do you currently have defined in your Facilities Service Catalog? What are the top 10 most frequently requested request types?

Please see response to question 10 for the number of workflows. The top request types are: 1) Mechanical and pipe trades, 2) door access and electrical, 3) structural trades- painting, 4) custodial, 5) grounds, 6) utility works.

67. How many proactive work orders (preventative maintenance) does your facilities team get per year, on average? What are the most common?

CMU would like to increase preventative maintenance and have fewer reactive tickets. The system has not been setup to provide the University with this data.

68. How many reactive work order requests does your facilities team get per year, on average? What are the most common?

8,000/year, HVAC is the most common reactive work order for too hot/too cold.

69. How many physical assets will need to be tracked by your facilities and custodial teams?

Currently 2,000 physical assets by FS.

70. How many incidents does your IT team typically experience each year? What are the most common types of incidents?

Over the last 5 years, IT has resolved 11,650 help desk tickets on average.

71. How many IT-Department CI's (configuration items) are in your CMDB (Configuration Management Database) today?

Web Help Desk has approximately 10,800 IT assets. These records are predominately computers, tablets, computer peripherals, printers/plotters, point of sale, card readers/scanner, and classroom AV equipment. Only 6,300 are actively deployed. The count includes 4,500 decommissioned devices store for historical information. The IT assets do not include network equipment such as switches and wireless access points today.