KANSAS CITY AREA TRANSPORTATION AUTHORITY

REQUEST FOR PROPOSALS (RFP) #G20-7044-25A
CUSTOM ENTERPRISE ASSET MANAGEMENT (EAM) REPORTS

ADDENDUM #1

Issue Date: September 1, 2020

_____

This Addendum is hereby made a part of the Request for Proposals and Project Documents to the same extent as if it was originally included therein and is intended to modify and/or interpret the bidding documents by additions, deletions, clarifications or corrections. The Contractor shall acknowledge receipt of this Addendum in their Proposal on the "Receipt of Addenda" form (herein attached) and shall include the form in Volume III, "Contractual."

_____

PROPOSAL CLARIFICATIONS

1. Is it KCATA's intent to replace the role of Thingtech application with EAM and CSF and then to retire ThingTech?

    The intention is, if a responsible proposer is able to submit an acceptable proposal, to replace the current role of the Thingtech software, as it exists today, with EAM and CSF custom screens. Note: Thingtech, as a company, is not precluded from bidding on this project.

2. Per 2.3 D, the customer requests that the implementor import historical and current TAM data into EAM. We infer that this information will come from Lawson and ThingTech. Is this correct? If not, what is the source of the data?

    The source of the data will be inventory records from spreadsheets (asset inventories 2020) and Lawson Version 9. By the time this project is underway, it also may be necessary to pull data our of Cloudesuite Financial, Lawson's successor. Also, to clarify, the proposer may advocate adding custom screens into EAM only, EAM and Cloud Suite Financial, or both, depending on the best way to implement these custom screens into and from based on the needs of the system architecture. We are willing to listen to the best solution(s). Both software systems are Infor products that are to be integrated for the KCATA and communicable between each other.

3. In 2.3 A(ii), you make mention of a "State of Good Repair" database. Regarding this database:
    o   Where does this reside in your infrastructure? Is it a physical database? Excel spreadsheet?
    o   Can you provide access to the data dictionary for this database?

    The SGR records will be the condition assessments from the latest Asset Inventories for the KCATA and its regional partners. These records will be in Spreadsheet form for this project. There is data online at fta.org on State of Good Repair standards if curious:

    https://www.transit.dot.gov/regulations-and-guidance/asset-management/state-good-repair

    Right now, there isn't a lot of access available from previous records on SGR, but asset inventory records (the inventory will be completed this year in 2020) will be available to the winning proposer. In general, assets are given a SGR rating, 1-5. This data is a simple condition assessment of the asset and historical records should have SGR ratings already. For clarity, EAM houses asset information on vehicles and other KCATA properties which are useful in determining a SGR rating, but the determination of the rating is made as a separate condition assessment which is not the same thing as say an asset's useful life.

4. We define "integration" as a permanent, real-time, automated communication between two information systems. This RFP does not appear to ask for any integration to be created explicitly, so we would like to know the following:

   o Does KCATA desire us to build an integration between CSF and EAM as part of this project? – Not necessarily, as integration between these systems is already in the process of being completed in 2020-2021. It should be assumed these two systems can communicate. If custom screens require both sides of the Infor ERP systems (EAM and CSF), integration should only be required up to the point that they haven't been done so already in order to allow the screens to function as described in this RFP.

   o Does KCATA desire an integration between EAM and ThingTech (assuming ThingTech remains)? ThingTech and EAM are not integrated. This project is meant to be a replacement for the current state of the ThingTech software (Salesforce), as it exists today.

   o Are there any other integrations between systems that KCATA expected us to create as part of this project? None, at this time.

5. KCATA lists multiple items the FTA requires for a TAM report. Does KCATA's current implementation of EAM act as the Asset Inventory Listing, for itself and its regional partners? If not, is KTACA interested in configuring EAM to provide this service?

   KCATA's Assets will be housed in the Financial System, Cloud Suite Financial (CSF) after implementation. Asset records (not to be confused with Assets), are in EAM and maintained by Fleet and Facilities maintenance. These are data records not the same data as the financial aspect of Asset Management Asset records.

6. The items following in this area (Asset Class, Asset Useful Life, Asset Financials, etc.) are generally data fields present and available on the Asset Inventory Listing for each asset under management in a standard EAM configuration. Are these fields available in your current configuration of EAM? If not, is KTACA interested in configuring EAM to provide this service?

   We believe these are available, however, how well they are populated and how well they interact with the CSF screens will not be fully known until implementation is complete. Yes, if the current awardee of the integration does not make these fields accessible/ available, we would like them to function to meet our needs.

7. The RFP states, "The KCATA currently uses Infor EAM for Maintenance tracking and is in the process of upgrading to Infor Cloudesuite Financial for financial record keeping." Is KCATA also using Infor EAM for asset inventory, materials, purchasing, and/or personnel planning and scheduling?

   See question 1. Procurement/Finance and AM will be housed in CSF; the system of record (inventory, etc.) will be housed in EAM, and asset records will be maintained in EAM. Scheduling may or not be fully implemented in EAM.

8. The RFP states, "KCATA is seeking a Systems Integrator to upgrade the reporting capabilities to work in conjunction with Infor EAM and/or Cloudesuite Financial as a one-time integration with minimal, if any, annual software licensing fees." Does KCATA intend to continue support for ThingTech, or is it KCATA's intent to discontinue use its of ThingTech?

   The KCATA intends to discontinue the current version of ThingTech and use a "one-time integration, so to speak.

9. Is Infor EAM currently Cloud hosted? Yes.

10. Can KCATA share its current EAM / CSF license count information? Specifically:
     a) Number of EAM full Users - 50
     b) Number of EAM report Consumers - 40
     c) Number of EAM advance reporting Authors - 5
     d) Number of EAM Mobile Users - 70
     e) Do you have ION? – Yes
     g) Do you have a GIS integration? No

11. How many assets does KCATA currently have in its asset registry? How many assets do regional partners currently have in the asset registry?

     As indicated in Section 2.2 Project Overview, Item C. The KCATA supports Johnson County Transit (JCT), Unified Government in Wyandotte County, and just a few assets in Jackson County. These assets are compiled in spreadsheet form.   The regional partners have collectively around **500-520** assets, which can change based on disposals, additions, etc. The KCATA needs to track these for reporting to the FTA. The KCATA Maintenance team inspects and reports SGR with yearly inspections on all Grant funded vehicle purchases for these respective partners as a requirement for the FTA. However, the responsibility of maintenance is on each agency.
     The KCATA had **1570** asset records as of 8-1-20. This includes all active asset records and no retired/disposed assets.

12. Does KCATA have a preferred reporting tool TAM and NTD reporting moving forward (e.g., Birst, Infor EAM Advanced Reporting/Cognos)? If so, which?

     NTD reporting is done through the FTA website. This will not change. The TAM Plan is a compiled word document that pulls in asset data from ThingTech/other sources. This also will not change for now.

13. In addition to Infor EAM and ThingTech, are there any additional systems that are being used, either by KCATA or its regional partners, for Asset Management capabilities?

     Excel spreadsheets, and Lawson 9: the financial record keeper of Assets.

14. If known, is any data that should be included in a TAM or NTD report currently/to be housed in Lawson/CloudSuite Financials that is not yet integrated to EAM?

     Asset records listed certain features that help with the SGR rating, among other things. Other than that and the financial information of each asset in CSF/Lawson 9, this is unknown. AM is a field that is changing rapidly.

15. Why was ThingTech initially selected for TAM and NTD reporting purposes (as opposed to Infor EAM/CSF inherent capabilities)?

     EAM was not fully implemented until 2019. Thingtech solved an issue of reporting that was not supported in Lawson Version 9 (either by software limitations, or lack of historical data entry records, or both)

16. The RFP states, "The Contractor shall provide technical services that will refresh current asset inventories for the KCATA and regional partners."
     a) How is this information currently collected? Excel Spreadsheet form and in Salesforce/Thingtech software.

     b) Does KCATA have any interest in changing that process as part of this Scope of Work?

     The KCATA will listen to business practice changes in a proposal, however, it must make data collection from the regional partners straightforward and simple and not add time and costing to their processes. The regional partner data is tracked only to provide SGR and the number of type of asset information. Additional details

outside of these main parameters aren't necessary at this time. This may change as the AM requirements change.

c) Is the selected consultant expected to physically perform the data collection activities necessary to complete the refresh?
Not necessarily. As long as a straightforward method of data collection and data dumping exists, the Asset Manager can handle maintaining and updating the Regional Partner asset information refresh. The KCATA data must be collected in real time from both the CSF AM screens and the EAM Asset Record screens. The integrity of the data entered by the KCATA will obviously reflect in the quality of data and reporting collected from these reports.

17. The RFP states, "Update the State of Good Repair database."
a) Does the SGR database exist separately from the EAM database? – It exists outside of EAM in ThingTech and in Asset Inventory spreadsheets.

b) Is KCATA interested in migrating it into EAM? Yes.

18. The RFP states, "A proposer may restrict the disclosure of scientific and technological innovations in which it has a proprietary interest, or other information that is protected from public disclosure by law, which is contained in the proposal. Given that the RFP response will be submitted electronically, is KCATA amenable to respondents restricting disclosure by the first method only?

Yes. Item #1. is the preferred by marking each page of each such document prominently in at least 16-point font with the words "Proprietary Information;"

19. The RFP states, "The Price Proposal shall include the following:" No inclusions are listed.
   ▪ KCATA anticipates awarding a firm fixed price contract.
   ▪ The Price Proposal shall be submitted in a separate volume and labeled as such. No price information is to be included in the Technical Proposal.

20. The RFP states, "Propose the billable hourly rates and number of hours of each individual (by position and name) to be assigned to this project. If additional line item costing is required, please provide on an additional sheet of paper." The Pricing Table does not provide lines for billable hourly rates and number of hours by individual. Where are proposers to include these lines? Billable hourly rates do not apply.

21. Did any other firms assist in authoring the RFP? If so, can KCATA share the names of this/these firm/s?
No, assistance was provided to the KCATA.

22. What will the working relationship, if any, be between the selected consultant for this scope of work and the current contractors involved with EAM?

Unknown. It depends on when the integration is completed (expected at the end of 2020).

23. Would KCATA be willing and able to provide proposers with a demonstration of KCATA's current EAM system use and functionality prior to the submission due date to allow proposers to more accurately assess configuration baseline?

Possibly. It would probably be more fruitful and open to all proposers to ask specific IT-related questions about EAM and CSF configurations.

END OF ADDENDUM #1

KANSAS CITY AREA TRANSPORTATION AUTHORITY
REQUEST FOR PROPOSALS (RFP) #G20-7044-25A
CUSTOM ENTERPRISE ASSET MANAGEMENT (EAM) REPORTS

RECEIPT OF ADDENDA

Proposers shall return this form when submitting their proposal as part of Volume III – Contractual.   The form shall be signed and dated by an authorized representative of the firm. Failure to submit this form may deem the Bidder non-responsive. As additional addenda are issued by, please notate date received below.
_____

We hereby acknowledge that the Addenda noted below have been received and all information has been incorporated into the Invitation for Bid as required.

Addendum #1 dated August 26, 2020   Date Received _____

Addendum #2 dated September 1, 2020   Date Received _____

Addendum #3 dated _____   Date Received _____

Company Name _____   Date _____

Address/City/State/Zip _____

Authorized Signature _____ Printed Name _____

Telephone _____ Fax _____ Email _____