

CAPITAL PROJECT REPORTING INSIGHTS SYSTEM (CAPRIS)

REQUEST FOR PROPOSAL (RFP)

November 25, 2025

ADDENDUM NO. 2

To prospective bidders under request for proposal (RFP) Capital Project Reporting Insights System (CAPRIS)

1. Notice is hereby give that RFP Capital Project Reporting Insights System (CAPRIS) has been revised as follows:

a. On Cover Page:

RESPONSE DUE

December ~~1~~ 8, 2025

4:00 p.m. PST

b. II. CALENDAR OF EVENTS

EVENT	DATE/LOCATION
RFP Issued	November 13, 2025
MANDATORY Proposal Presentation	Tentative – Week of December 15 - 19, 2025 (In-person or Virtual via Microsoft Teams)
Questions Due	November 21, 2025, by noon.
Response Due	December 1 8, 2025 by 4:00 p.m.
Anticipated Contract Start Date	January 13, 2026

2. Pre-proposal questions and answers

A total of 72 questions have been addressed.

Question 1: Can an extension be granted on the due date deadline?

Answer:

Yes, the District is granting an extension to submit responses. The new deadline is December 8, 2025 by noon.

Question 2: The RFP states an amount “not to exceed \$2M” for a three-year term with two optional one-year extensions. Would the District please confirm whether the \$2M total amount includes the optional two one-year extensions? Understanding this will help us accurately assess contract scope relative to the budget.

Answer:

The "not to exceed \$2,000,000" amount applies to the initial three-year term plus the two optional one-year extensions, for a total potential contract duration of up to five years.

Question 3: What system(s) does the District currently use for the following scheduling functions?

- Project scheduling and schedule management
- Schedule changes
- Resource scheduling

Answer:

Project schedules, schedule changes, and resource scheduling are currently managed using a combination of:

- Excel and SharePoint for activity tracking and milestone updates
- MS Project for selected projects
- Oracle Fusion for financial schedule elements
- Ad-hoc tools depending on project manager preferences

The District does not currently use a single unified enterprise scheduling system.

Question 4: Would the District please confirm whether project scheduling, management of schedule changes, and resource scheduling are outside the scope of the CAPRIS solution?

Answer:

Project scheduling, management of schedule changes, and resource scheduling are within the scope of the CAPRIS solution, all at a milestone level, and not necessarily down to individual tasks. However, the District is open to hearing solutions from proposers that provide a lower-level of detail or have optional functionality.

The District is additionally open to integrations with MS Project as a way to provide both milestone and task-level tracking within CAPRIS, as one example. That is, if MS Project is integrated and feeds milestone-level data to CAPRIS, it could fulfill this need.

Question 5: Should proposers assume that CAPRIS is only required to integrate scheduling data from the source system(s) for reporting purposes, rather than serve as the scheduling system itself?

Answer:

Proposers should not assume that CAPRIS is limited to integrating scheduling data. CAPRIS is intended to be flexible and may either integrate with external scheduling tools or serve as the District's platform for entering, tracking, and managing resource allocations and major project milestones.

The District does not currently have a centralized scheduling system; therefore, CAPRIS must support milestone-level schedule management within the Solution. If the proposed Solution includes native scheduling capabilities, the District is open to adopting those features as part of implementation.

CAPRIS is expected to support milestone tracking, milestone updates, and schedule-driven forecasting and reporting.

Question 6: Would the District confirm that all cost entry, adjustments, amendments, journal entries, and budget modifications occur within Oracle Fusion, the source system?

Answer:

Yes. All cost entry, adjustments, amendments, journal entries, and budget modifications (in terms of legal appropriations) occur within Oracle Fusion, which serves as the District's authoritative source system for financial transactions. Project budget requests – that is, asking for additional funding – would be routed through CAPRIS, but entries would be made in the District's financial information system (FIS) by finance staff once budget requests are approved.

Question 7: Should proposers assume that CAPRIS will consume cost data from Oracle Fusion strictly for analytics, reporting, forecasting, and variance tracking, and will not be used to initiate or post cost transactions?

Answer:

Yes. CAPRIS will consume cost data from Oracle Fusion for analytics, reporting, forecasting, and variance tracking. CAPRIS will not be used to initiate, modify, or post financial transactions in Oracle Fusion.

Question 8: Where are project estimates currently developed? In Oracle Fusion, spreadsheets, a project management system, standalone estimating tool?

Answer:

Project estimates are currently developed primarily in spreadsheets, supported by reference data from Oracle Fusion, historical project information, and engineering judgment. The District does not use a standalone project estimating tool or a dedicated estimating module today.

Question 9: Does the District intend for CAPRIS to serve as its project estimating tool, or only to report on estimates created elsewhere?

Answer:

Yes. CAPRIS is intended to serve as the District's platform for entering, tracking, and comparing project estimates at major milestones. Users will develop and maintain project estimates directly within CAPRIS. If the proposed Solution includes native project estimating capabilities, the District is open to adopting those features as part of the implementation.

Question 10: What system does the District currently use for project management (task tracking, scope changes, change orders, resource management, time entry, etc.)?

Answer:

The District does not currently use a single, centralized project management system for all project management functions. Project managers rely on a combination of tools, including:

- SharePoint – document management, task lists, project information tracking
- Oracle Fusion – financial transactions, commitments, and project cost data
- Excel / Office 365 – task tracking, schedules, estimates, risk logs, and change tracking
- Oracle Fusion/Power BI/Office 365 – project cost tracking
- Bluebeam – design review and markup workflows
- JIRA (limited use in some groups) – workflow tracking and issue management
- MS Project (select use cases) – detailed schedules for specific projects
- Time Entry: Completed in Electronic Timesheet System (ETS) (i.e., custom-built system)

No single system currently manages tasks, scope changes, change orders, resource allocation, and time entry end-to-end; activities are distributed across the tools listed above.

Question 11: Please confirm whether proposers should assume that CAPRIS will integrate data for the following processes, but will not replace the systems used to perform them:

- Project estimating
- Scope revisions
- Budget revisions
- Schedule changes
- Resource scheduling
- Time entry
- Project information tracking (initiation → closeout)

Clarification will help define the intended boundary between CAPRIS and existing tools.

Answer:

Yes. Proposers should assume that CAPRIS will integrate data from budgeting and time entry processes.

CAPRIS is intended to serve as the District's centralized system where users will enter, track, update, compare, and manage major project-level information, including:

- Project estimating
- Scope revisions

- Budget revisions
- Schedule changes
- Resource scheduling
- Project information tracking from initiation through closeout

These activities will be performed within CAPRIS at the major milestone level to support capital improvement program (CIP) financial management, reporting, and program-level visibility.

Question 12: To better understand workflow boundaries, can the District clarify:

- What specific functions are Project Managers expected to perform within CAPRIS, versus in other systems they use today?
- What specific functions will Cost Engineers perform within CAPRIS, versus responsibilities that remain outside of CAPRIS?

This information will help us understand role-based design expectations, training scope, and potential system overlap.

Answer:

The District does not have a dedicated “Cost Engineer” job classification. At EBMUD, project managers perform both project management and cost-engineering functions. Accordingly, the role expectations for project managers within CAPRIS encompass the full range of project-level cost and schedule responsibilities.

Project managers will perform the following functions within CAPRIS, including but not limited to:

- Enter and update project forecasts and schedules
- Request approval for budget and schedule changes
- Review and monitor cost data integrated from Oracle Fusion
- Monitor budget vs. actual performance
- Update project status, milestones, and schedule-related information
- View dashboards and reports on project status, expenditures, and variances
- Initiate or update budget-related workflows triggered within CAPRIS (e.g., variance thresholds)
- Track allocations, commitments, and pending charges across the project timeline
- Align cost forecasts with schedule changes through time-phased functionality

Functions that remain in other systems (not performed within CAPRIS), included but not limited to:

- Financial transactions, journal entries, budget adjustments: Oracle Fusion
- Time entry: Oracle
- Detailed task-level scheduling for complex projects: MS Project, Excel, or other tools used today
- Document management for design review: SharePoint and Bluebeam
- Workflow or issue tracking used by specific groups: JIRA
- Creation of initial project estimates: Existing tools (Excel, legacy templates, estimating systems)

- Construction management: Kahua or similar systems

Project managers will use CAPRIS for forecasting, cost tracking, schedule alignment, status updates, and reporting, while continuing to use existing enterprise systems for financial transactions, time entry, detailed scheduling, and document management.

Question 13: What tools are each group below using today, and how would you rate the project and portfolio management maturity level of each group?

Answer:

- Project Managers
 - Tools: Oracle Fusion, SharePoint, Office365, Power Bi
 - Maturity level: Intermediate
- Finance and Budget
 - Tools: Oracle Fusion, Oracle Enterprise Performance Management (EPM) - Planning, InVizion, SharePoint, Office365
 - Maturity level: Intermediate
- Engineering
 - Tools: Oracle Fusion, SharePoint, Office365, Power Bi
 - Maturity level: Intermediate
- Information Technology
 - Tools: Oracle Fusion, SharePoint, MS Project, Office 365, Power Bi
 - Maturity level: Intermediate

Question 14: For the technical and functional requirements, which ones are most critical in your decision-making process? Which ones can you not do today that are must haves?

Answer:

The most critical requirements are those that unify cost, schedule, and resource information into a single, time-phased reporting framework. Today, these components exist in separate systems, require manual data manipulation, and cannot be tied together for portfolio-level visibility. The following capabilities therefore drive the core of our decision-making:

- Time-Phased Cost and Schedule Integration (must have)
Cannot do today: We cannot automatically align budgets, forecasts, expenditures, and schedule changes in a single system.
- Automated Cost Tracking and forecasting with Oracle Integration (must have)
Partially possible today, but highly manually, therefore a must have.
Current workflows require exporting data from Oracle, manipulating spreadsheets, and assembling reports manually.
- Integrated CIP Budget Management & Scenario Analysis (must have)
Cannot do today within a unified system. Budget planning, CIP allocations, project estimates, and revised forecasts are spread across spreadsheets and different groups.

- Workflow-Driven Budget Approvals (must have)
Not available today. Budget adjustments and thresholds are handled manually through email, spreadsheets, and departmental routing.
- Centralized, Role-Based Dashboards (must have)
Cannot do today without extensive manual effort. Leadership, Project Managers, Engineering, and Finance each use separate reports.

Question 15: Who owns this initiative from an executive side? Who are the key influencers in the decision (roles)?

Answer:

Wastewater Department Director along with Engineering and Construction Department Director.

Key Influencers: Engineering - (Project Managers), Finance - (Principal Management Analysts, Manager of Budget), Information Systems Department - (Project Management Office, Applications, and IT Security)

Question 16: Which other District databases and cloud SaaS applications must CAPRIS integrate with by the Core Functional Rollout milestone of June 30, 2026?

Answer:

By Core Functional Rollout, CAPRIS must integrate with:

- Oracle Fusion Cloud Financials (required)
- Azure Active Directory for SSO

Question 17 Which Oracle Fusion modules, tables, and data domains must CAPRIS integrate? Directionality, frequency, volume, ownership, and mapping requirements?

Answer:

CAPRIS must integrate with Oracle Fusion for the following domains:

- Projects
- Award/Project/Task structure
- Budget and CIP allocations
- Actual expenditures
- Commitments and encumbrances
- Labor cost distribution (summary level)

Directionality:

- Pull-only into CAPRIS
No data will be pushed back to Oracle

Frequency:

- Nightly batch refresh is sufficient; real-time is not required

Volume:

- Moderate — approximately several thousand records per month

Ownership:

- Oracle Fusion remains the system of record

Mapping:

- District will provide sample schemas where available

Question 18: Is there a preference for integration frequency and performance requirements?

Answer:

Nightly ETL or scheduled batch refresh is sufficient for:

- Projects
- Award/Project/Task structure
- Budget and CIP allocations
- Actual expenditures
- Commitments and encumbrances
- Labor cost distribution (summary level)

Error handling expectations:

- Logging of failed loads
- Clear error messages
- Retry capability
- Summary reporting for the District

Question 19: Does “Optionally – Integrate the Solution with existing project cost tracking dashboard” refer to Power BI? Should CAPRIS replace or feed the dashboard?

Answer:

Yes, this option refers to Power BI. which currently reads from Oracle Fusion extracts.

CAPRIS may:

- Replace the existing dashboard if the Solution natively provides functionality listed in the Minimum Technical and Functional Requirements section of the RFP, or
- Provide data feed to it

Question 20: Can you describe the volume, cleanliness, and historical depth of the legacy spreadsheets to be migrated?

Answer:

No legacy spreadsheets will be migrated into CAPRIS. Legacy spreadsheets, as mentioned in the scope, are used to manage and report on capital project financials and contain data extracts from Oracle Fusion.

Question 21: ESRI 11.3 REST integration — which layers, and read-only or read/write?

Answer:

CAPRIS only needs *read-only access* to GIS layers including but not limited to:

- Project locations
- Pressure zone boundaries
- Service area boundaries
- Facility locations

Spatial data will be consumed via REST. Embedded maps inside the application are beneficial but not required. Applicable only if the Solution natively provides this functionality.

Question 22: Does CAPRIS need to capture/record actual labor, consultant contracts, and encumbrances, or will this come from Oracle Fusion? Can resource data be captured at a summarized level?

Answer:

Actual labor, consultant contracts, and encumbrances will come from Oracle Fusion through integration. Resource data can be recorded at a summarized level; CAPRIS should support viewing and analyzing that summarized data at various levels of detail.

Question 23: Can resource data (staff and facilities) be captured at a summarized level and tracked monthly instead of hourly/daily?

Answer:

The District is open to native Solution capabilities that support capturing and tracking data at various timesteps (e.g., hourly, daily, biweekly, monthly), provided they align with District business processes. At a minimum, CAPRIS must capture and manage milestone-level information. Proposers are encouraged to demonstrate how their Solution can accommodate additional levels of detail where appropriate. Flexibility is essential, as CAPRIS must support varying project needs and levels of complexity.

Question 24: Is a nightly refresh of real-time CIP charges sufficient?

Answer:

Yes, nightly load of CIP charges from Oracle Fusion is sufficient.

Question 25: Can EBMUD provide samples of GFOA/BARS-compliant project sheets for CIP publication?

Answer:

The District's public Capital Improvement Program document is called "Biennial Budget Fiscal Years 2026 and 2027 - Volume 2" and is available at the following website: <https://www.ebmud.com/customers/billing-questions/budget-and-rates/reports-and-studies>. Additional information will be provided to the successful provider as needed and if available.

Question 26: What percentage of Power Users and others will receive early access for feedback and UAT?

Answer:

100% of power users and approximately 10–15% of general users, representing core user groups, will be provided access during configuration review and UAT.

Question 27: Does the Core Functional Rollout deadline of June 30, 2026 include UAT and production go-live?

Answer:

Although the RFP does not explicitly list UAT under the Core Functional Rollout definition, achieving the required 75% active user adoption necessarily means that UAT has been completed and accepted by the District. Therefore, UAT is included as part of Core Functional Rollout.

Production go-live, however, occurs after Core Functional Rollout, during which the remaining 25% of users are trained and brought up to full adoption.

Question 28: Can liquidated damages be replaced with a cure period?

Answer:

The District is open to alternatives to liquidated damages. Please note this in the “Exceptions, Clarifications, Amendments” portion of the response.

Question 29: Can “immediately” in RFP Article 4 – Termination be replaced with a 10-day cure period?

Answer:

The District is open to alternatives to liquidated damages. Please note this in the “Exceptions, Clarifications, Amendments” portion of the response.

Question 30: Can our SOC 2 Type II report satisfy the “Evidence of Qualification Testing” requirement?

Answer:

Section 6 includes language typically used for hardware procurements. Since CAPRIS is a cloud-based software Solution, the District clarifies that:

- ITA qualification testing is not required for standard SaaS or cloud platforms.
- Proposers may instead submit independent certifications such as SOC 2 Type II, ISO 27001, penetration tests, or other third-party testing that demonstrates platform security and reliability.
- Under the District’s sole discretion (as stated in Section 6), this evidence may fully satisfy the requirement.
- Additional testing would only be needed if a proposer includes custom modules or untested components.

Question 31: What does “Integration with Key Performance Indicators (KPI)” entail?

Answer:

In this context, “Integration with Key Performance Indicators (KPI)” refers to ensuring the Solution aligns project cost, schedule, and performance data with the District’s existing and future KPIs, rather than creating a separate or isolated reporting layer.

Specifically, this entails:

- Aligning system data elements (budget, actuals, forecasts, milestones, variances) with the District’s defined KPIs.

- Supporting automated calculation and display of KPIs within dashboards and reports.
- Ensuring data consistency so KPIs draw from authoritative sources (e.g., Oracle Fusion, District databases, and the CAPRIS data model).
- Enabling KPI-driven views such as performance summaries, trend analysis, and variance indicators.
- Allowing new KPIs to be added or configured as the District refines its performance framework.

This requirement is not asking proposers to integrate with an external KPI system; it is asking that the Solution can represent and support KPIs using the District's operational and financial data in a consistent, reliable, and transparent manner.

Question 32: Is fixed fee mandatory, or can this be structured as a “Not-to-Exceed” time and materials project?

Answer:

For this RFP, the District requires a fixed fee proposal to maintain consistency in evaluating all submittals. Proposers can include detailed time-materials (level-of-effort details, hourly rates) or other supporting cost information to explain how the fixed fee was developed.

Question 33: Is the timeline for delivery described in the RFP flexible (e.g., pilot configurations within 8–10 weeks of notice to proceed and core functional requirements within 6 months)?

Answer:

The timelines described in the RFP establish the District's required milestones, including delivery of pilot configurations and completion of Core Functional Rollout no later than June 30, 2026.

While proposers may propose alternative sequencing or delivery methodologies consistent with their implementation best practices, the overall milestone deadlines are not flexible and must be met as stated in the RFP.

Proposers should therefore structure their schedules to ensure all required outcomes can be achieved within the specified timeframe. The Proposer may indicate what is required of the District in order to meet those timelines.

Question 34: The RFP mentions “up to two focused stakeholder workshops.” Is there an option for additional requirements-gathering sessions?

Answer:

The RFP specifies up to two focused stakeholder workshops to validate requirements. This is intended to maintain a lean schedule and avoid unnecessary meetings. However, the District may allow additional targeted sessions, at its discretion, if they are necessary to clarify requirements or support successful configuration.

Question 35: Can the District clarify how many workshops they expect (requirements, validation, needs assessments) and which user groups would be involved?

Answer:

The District anticipates up to two primary stakeholder workshops for requirements validation, as described in the RFP. Additional targeted sessions may be held only if needed and at the District's discretion.

Expected participants include representatives from Project Management, Engineering, Finance/Budget, IT, and Administrative/Executive user groups.

Proposers may suggest supplemental touchpoints in their methodology but should plan around the two core workshops.

Question 36: The RFP says the District will lead stakeholder engagement while the Proposer facilitates. Can you clarify what you plan to handle (scheduling, outreach, communication) versus what you expect from the vendor team?

Answer:

The District will lead stakeholder engagement, which includes:

- Identifying the stakeholder groups and required participants
- Initiating outreach and securing attendance
- Scheduling all workshops and major touchpoints
- Communicating District expectations, priorities, and decisions

The Proposer will facilitate the engagement activities, which includes:

- Preparing agendas, materials, and facilitation plans
- Leading the workshops and discussions
- Documenting requirements, decisions, and action items
- Providing follow-up materials such as summaries and updated documentation

Proposers should assume the District will coordinate logistics and participation, while the vendor will provide structure, facilitation, and documentation to ensure productive and efficient sessions.

Question 37: Does the District already have a change management framework or team in place, or should the Proposer plan to lead and deliver the full change management approach?

Answer:

The District does not have a dedicated change-management team or formal change-management framework for this project. As stated in the RFP, the Proposer is expected to lead and deliver the full change-management approach, including training, communications, user-adoption support, and related materials. The District will participate in stakeholder engagement and decision-making but will rely on the Proposer to provide the structure, methodology, and execution of change-management activities.

Question 38: For role-based and wave-based training, does the District expect the Proposer to run all live sessions, or mainly create the materials while District staff deliver them?

Answer:

The District expects the Proposer to run all live, role-based, and wave-based training sessions. The Proposer shall also develop and provide all training materials, including job aids, videos, and reference guides, which District staff may access and use as needed after the initial training waves.

Question 39: Can the District confirm whether or not they're looking for professional/consultant services from the selected bidder(s) in addition to the CAPRIS software requested in the RFP?

Answer:

Yes. As described in the Contracting Approach appendix, the District expects the selected Proposer to provide both the CAPRIS software (or configuration of an existing District-owned platform) and the full suite of professional services needed for implementation. This includes configuration, integration, data migration, training, change management, testing, and post-go-live support.

Proposers should plan for a comprehensive services engagement aligned with the scope and deliverables in the RFP.

Question 40: Could EBMUD clarify if the integration to Oracle Fusion Cloud Financials is a requirement that must be completed by 6/30/2026?

Answer:

Integration with Oracle Fusion Cloud Financials is a minimum functional requirement of the CAPRIS Solution. While the RFP does not explicitly list a separate deadline for this integration, achieving Core Functional Rollout by June 30, 2026 inherently requires the integration to be in place.

Question 41: Would EBMUD consider removing the following requirement: "Achieves at least 75% active user adoption, measured by user login, completion of assigned training, and use of core functions" from the definition of Core Functional Rollout since vendors can only influence (but not completely control) which EBMUD users log in to the system? If not, could EBMUD clarify any consequences that would impact vendors if this success measurement criteria is not achieved?

Answer:

The District intends to retain the 75% user-adoption requirement within the definition of Core Functional Rollout for the purpose of evaluating proposals, as it reflects the District's goal of achieving meaningful, broad-based engagement with the new system.

The District understands that vendors cannot directly control individual user behavior.

Consistent with the Liquidated Damages provisions, any performance-related

consequences apply only when delays or issues are attributable to the Contractor, not when caused by District actions or District users.

Question 42: How many project templates are required for go live?

Answer:

The District does not have a fixed number of project templates required for go-live. If applicable for the purpose of the RFP submittal, Proposers could assume a small set of core templates aligned with the District's most common project types, with the ability to expand or refine templates after initial deployment.

Question 43: Are Project Managers responsible for scheduling resources?

Answer:

Project Managers are responsible for managing and updating project schedules and resource needs within their projects. However, broader workforce planning and resource allocation may involve coordination with other groups such as supervisory, engineering, or administrative staff. Proposers should design a flexible approach that supports both PM-level and department-level workflows.

Question 44: Do users have mobile devices to access the system?

Answer:

Yes. District users have access to mobile devices; however, mobile access is not a requirement for the CAPRIS implementation. The primary expectation is desktop and laptop access through a standard web browser.

Question 45: What is the District's ACV for the next 3 and 5 years? This information will help us provide accurate pricing estimates.

Answer:

The District's Annual Construction Volume (ACV) is not relevant to this RFP and is not required for pricing the CAPRIS Solution. This procurement focuses on implementing a project reporting, budgeting, forecasting, and analytics platform—not on construction delivery or construction contract volume.

Proposers should base their pricing solely on the scope, user counts, functional requirements, and implementation tasks defined in the RFP.

Question 46: Given the breadth of requirements, would the District consider a phased Core Functional Rollout, where baseline budgeting/forecasting/reporting capabilities go live by June 30, 2026, with advanced features delivered by December 31, 2026?

Answer:

Proposers may propose an alternative delivery methodology or phase structure that reflects their established best practices, provided that the proposed approach achieves Core Functional Rollout no later than June 30, 2026.

Question 47: Has the District engaged in conversations with, or received product demonstrations from, any other vendors related to the requirements outlined in this RFP within the past 12 months?

Answer:

The District regularly conducts general market research as part of its ongoing technology planning efforts. These activities may include high-level informational discussions or product demonstrations that are not tied to any active procurement and do not provide any vendor with an advantage in the competitive process. The intent of the RFP's flexibility and the broad outreach is to find the best Solution for the District.

The District confirms that no vendor has been given early access to requirements in this RFP or evaluation criteria that would provide a competitive benefit for this RFP. All proposers have access to the same information exclusively through the published RFP and official addenda, in accordance with the District's procurement policies.

Question 48: Ref. RFP Page 12, Task 4.6 (Migration): Regarding the migration of legacy spreadsheets: Can the District provide an inventory of legacy spreadsheets and systems to be migrated, including data volumes and formats, as well as details re: condition and standardization? Will the District perform data cleansing prior to hand-off, or is the Vendor responsible for normalizing historical data from disparate spreadsheet formats?

Answer:

No legacy spreadsheets will be migrated into CAPRIS. As noted in the RFP, existing spreadsheets are used internally to compile data extracted from Oracle Fusion Cloud Financials. CAPRIS will source authoritative financial data directly from Oracle Fusion. No spreadsheet inventory or cleansing is required.

Question 49: Is there an existing data warehouse or data lake that the Solution should interface with, or will all integrations be point-to-point?

Answer:

No. The District does not operate a centralized data warehouse or data lake for this scope. Integrations will be point-to-point per the RFP.

Question 50: Ref. RFP Page 4 & 9 (Integrations): The RFP references integration with 'District databases.' Can the District provide a specific list of these databases, their platforms (e.g., SQL Server, Oracle, Access), and the nature of the data to be ingested? Without a defined list of sources, it is difficult to accurately scope the ETL effort.

Answer:

District integrations include on-premises Oracle and SQL Server databases relevant to capital project workflows. The primary non-Fusion system currently in scope is the Electronic Timesheet System (ETS). CAPRIS must meet the integration requirements defined for Core Functional Rollout; specific datasets will be confirmed during requirements validation.

Question 51: Ref. RFP Page 9, 'Project Cost Tracking': The requirement mentions 'Up to real-time... tracking of actual expenditures.' regarding the integration with Oracle Fusion Cloud Financials. Does the District currently have available APIs or middleware (e.g., MuleSoft, Oracle Integration Cloud) in place for this data exchange, or is the Vendor expected to scope and build the API endpoints on the Oracle side as part of this contract?

Answer:

The Vendor will work with District IT staff to access existing Oracle Fusion integration mechanisms. The District will provide available API endpoints or integration patterns; the Vendor is not expected to build Oracle-side APIs.

Question 52: Ref. RFP Page 9, Section 'Project Cost Tracking': The requirements imply a bi-directional data flow (e.g., 'Alignment with budget approvals... ensuring PM forecasts cannot exceed authorized budgets'). Does the District require the Solution to write back approved budget changes directly into Oracle Fusion Cloud Financials, or is the integration purely one-way (ingesting Actuals/Commitments from Oracle to the Solution)?

Answer:

Integration is one-way (read-only) from Oracle Fusion Cloud Financials into CAPRIS. CAPRIS will not write budget or forecast changes back into Oracle Fusion.

Question 53: Ref. RFP Page 12, Task 4.5 (GIS Integration): The RFP mentions integrating with ESRI 11.3 using REST services. Could the District clarify the expected functional scope of this optional GIS integration? Is this integration intended strictly for visualizing project locations on a map within the dashboard, or does the District expect the Solution to consume and process spatial data (e.g., polygon intersections, spatial queries)?

Answer:

CAPRIS requires read-only access to ESRI 11.3 REST layers, including project locations, pressure zones, service areas, and facility locations. Spatial data will be consumed via REST. Embedded maps are beneficial but not required unless natively available.

Question 54: Will the District provide test environments and sample data for integration and migration validation?

Answer:

The Vendor will provide the CAPRIS application test environments as required by the RFP. The District will support integration and data-validation activities by providing test data extracts and, where available, access to District test environments.

Question 55: Ref. RFP Page 3, Section A (Scope): The RFP states the District intends to award a contract not to exceed \$2,000,000. Does this budget cap include the recurring Azure consumption costs if the solution is deployed within the District's own Azure tenant (e.g., 'Existing Platform Configuration Path'), or is the cap inclusive only of the Vendor's software licensing and professional services?

Answer:

No. Azure hosting in the District's existing tenant is funded separately. The \$2 million cap applies to software licensing (if applicable) and implementation/professional services.

Question 56: What licenses does the District already hold (Power Apps per user/per app, Power Automate, Power BI Pro/Premium)?

Answer:

The District maintains Microsoft 365 G3 licenses, including Power Apps, Power Automate, and Power BI Pro entitlements.

Question 57: If using District enterprise cloud, should hosting costs be excluded from pricing?

Answer:

Yes. Hosting within the District's Azure tenant should not be included in proposal pricing unless explicitly required by the Vendor's architecture.

Question 58: Can the District clarify the anticipated breakdown of user roles (e.g., Project Managers, Finance, Power Users) to help optimize licensing, change management plans, and training plans?

Answer:

Proposers may assume the following high-level categories:

- Project Managers (primary user base)
- Power Users (approx. 5% of primary users)
- Budget Analysts (7 people)
- System Administrators (1-5 people)
- Senior Management Team (about 15 people)
- General Staff (depending on the solution, another 50 or so)

More precise distributions will be confirmed during requirements validation.

Question 59: Ref. RFP Page 7, Section I (Implementation Approach): The RFP describes two paths ('Software Path' and 'Existing Platform Path'). If a Proposer offers a hybrid solution that utilizes a Commercial SaaS for core transaction management (Software Path) but leverages the District's Microsoft Power Platform for reporting and analytics (Existing Platform Path), should this be submitted under a specific path, or is a hybrid classification acceptable?

Answer:

Yes. The path structure is primarily for contracting purposes. A hybrid approach is acceptable.

Question 60: Ref. RFP Page 4, Section C (Specific Requirements): The RFP mentions a 'phased implementation' starting with financial/cost modules. Does the District require the

entire solution to go live at once for the 'Core Functional Rollout' deadline, or can the '75% adoption' metric be applied per module (e.g., 75% of Finance staff adopting the Cost module counts as success)? Requiring 75% of all 500 users to adopt before the June 2026 deadline may conflict with a phased rollout strategy.

Answer:

No. Core Functional Rollout must be completed by June 30, 2026 with all minimum functional requirements and 75% District-wide active user adoption.

A phased delivery methodology is allowed so long as full Core Functional Rollout is achieved by the deadline.

Question 61: Ref. RFP Page 6, Section 'Project Overview': The RFP lists a District Project Manager (PM) who will lead stakeholder engagement and decision-making. To ensure the aggressive timeline for Core Functional Rollout (June 2026) is met, will this District PM be a dedicated, full-time resource assigned to CAPRIS, or will they be balancing this project with other operational duties? If not full-time, what is the expected weekly allocation (in hours) will the District PM dedicate to this implementation?

Answer:

Yes. The District PM has allocated 80% of their available time and will have sufficient availability to support the project. Stakeholder availability is addressed in earlier responses (workshops, engagement, and facilitation).

Question 62: How many reports and dashboards does the District anticipate requiring for this project?

Answer:

The District does not have a fixed count. Proposers may assume a small set of core dashboards and reports aligned with the District's most common project and financial oversight needs, with additional reports developed post-deployment, potentially with the District's own system administrators if allowable.

Question 63: Should Vendor include optional enhancement modules in the base implementation schedule/cost, or only price them separately as future options?

Answer:

No. Optional enhancements should be priced separately.

Question 64: Could the District clarify the expected scope of the optional predictive analytics and scenario planning capabilities?

Answer:

This is dependent on each Solution's native capabilities. Predictive analytics and scenario planning is optional and not required for RFP submittal.

Question 65: Are there specific cybersecurity frameworks (e.g., NIST, ISO 27001) or state/local privacy laws beyond SOC 2 Type II that the Solution must comply with?

Answer:

Refer to RFP Section “6. Evidence of Qualification Testing.” The District may, at its sole discretion, determine whether additional validation is required depending on untested components or features.

Question 66: Will the District require annual third-party security assessments or penetration testing?

Answer:

Refer to RFP Section “6. Evidence of Qualification Testing.” The District may, at its sole discretion, determine whether additional validation is required depending on untested components or features.

Question 67: Ref. RFP Page 10, Task 2 (Requirements Validation): The schedule requires 'focused stakeholder workshops' to validate requirements quickly. Can the District confirm that the necessary Subject Matter Experts (SMEs) from Finance, Engineering, and IT will be made available for these intensive workshops (potentially multi-day sessions) during the initial 8–10-week period? Additionally, what is the District’s standard turnaround time for reviewing and approving design deliverables (e.g., 5 business days)?

Answer:

Yes. The necessary District SMEs will be made available. Turnaround times for design deliverables will be defined during contract negotiations. Proposers are recommended to include any expected requirements of District staff in the proposal.

Question 68: Ref. RFP Page 12, Task 5 (Testing & QA): Successful User Acceptance Testing (UAT) is critical for the '75% adoption' metric required for Core Functional Rollout. Will the District commit to providing a dedicated group of 'Power Users' (approx. 5% of users) who are released from their daily operational duties for specific windows to participate in UAT and Train-the-Trainer sessions?

Answer:

The District will identify and allocate appropriate users for UAT and training activities. This is a general response, as detailed resource negotiation occurs after award.

Question 69: Does the District want the online help center embedded inside the platform or hosted externally?

Answer:

This depends on the Solution’s native capabilities. The District is open to either approach.

Question 70: Ref. RFP Page 19, Section A (RFP Acceptance): To facilitate rapid decision-making required by the schedule, has the District established a CAPRIS Steering Committee or Executive Sponsor with the authority to resolve conflicting requirements between departments (e.g., Finance vs. Project Management) without lengthy delays?

Answer:

Yes.

Question 71: Ref. RFP Page 4 & 13 (Core Functional Rollout): The RFP defines Core Functional Rollout success partly as achieving 'at least 75% active user adoption.' How does the District define 'active use' for this metric (e.g., single login per month, daily usage)? Furthermore, if the solution involves multiple components (e.g., a transaction system and a reporting portal), does usage of the reporting portal count toward this adoption metric?

Answer:

Yes. Active use includes engagement with the Solution appropriate to the user's role, including reporting portal usage. Use of reporting tools counts towards achievement.

Question 72: Ref. RFP Page 24, Section G.3 (Liquidated Damages): The RFP imposes LDs of \$1,000/day if Core Functional Rollout is not achieved by June 30, 2026. Given that 'Active User Adoption' (75%) is a condition of this rollout, and adoption is heavily dependent on District staff availability for training and internal change management: Will the District agree to a 'stop-the-clock' provision on LDs if the vendor can demonstrate that training sessions were offered but poorly attended, or if UAT sign-offs are delayed by District staff?

Answer:

This should be noted in the "Exceptions, Clarifications, Amendments" portion of the response. Additionally, requirements of District staff may be included in proposals.

END OF QUESTIONS