



## ADDENDUM

Date: **October 6, 2021**  
Subject: **Questions & Answers for Project Management Support  
for Oracle Cloud Enterprise Resource Planning Platform  
Implementation**  
RFP Number: **20210723**  
Due Date/Time: **October 20, 2021 1:00 p.m. ET**  
Addendum Number: **1**

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To All Offerors:

A solicitation "Addendum" is defined by the Commonwealth of Pennsylvania as an addition to or amendment of the original terms, conditions, specifications, or instructions of a procurement solicitation (e.g., Request for Proposals or Request for Quotations).

*List any and all changes:*

- Attached are questions received as of 12:00PM, September 29, 2021, along with the PLCB's responses.
- The Master Project Plan and RAID log for the ongoing ERP project will be provided via a shared folder to any proposer who requests access.

For an Offeror's proposal to be considered, the Offeror must:

- Contact Issuing Officer Josh Greene identifying an email address to be granted access to upload files to a OneDrive folder established by the PLCB.
- After being granted access to the OneDrive folder, the Offeror must upload a single copy of each of two separate electronic files (the technical proposal and the cost proposal) by 1:00 PM ET on October 20, 2021.
- All proposals must be properly signed, per the [signature requirements of the Pennsylvania Procurement Handbook](#).

Except as clarified and amended by this Addendum, the terms, conditions, specifications, and instructions of the solicitation and any previous solicitation addenda, remain as originally written.

Respectfully,

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**PROJECT MANAGEMENT SUPPORT FOR ORACLE CLOUD ENTERPRISE RESOURCE  
PLANNING PLATFORM IMPLEMENTATION  
PLCB RFP# 20210723**

**Questions and Answers**

**Q1. Currently, project representatives work remote until further notice. Based on the project timeline in Appendix G, when do you anticipated going to on-site meetings? Do you foresee going fully on-site at any time or have a tentative transition date for doing so?**

*A1. The vast majority of PLCB administrative employees have been granted permission to telework permanently rather than regularly report to the office. Executive staff and managers do report to the office a few times a month in support of Board Meetings and other business meetings better conducted in person. The PLCB does not anticipate requiring all or a greater portion of employees to return to the office in the future.*

*From Section III-3 (page 15) of the RFP:*

*“NOTE: From project initiation in August 2020 through current day, Project New Horizon has progressed completely remotely, with all PLCB, Oracle, Deloitte and CMG representatives utilizing telephone and web platforms to facilitate meetings. Most PLCB employees engaged in Project New Horizon telecommute full- or part-time; however in-person meetings may resume in coming weeks and months, depending on public health circumstances. Contractor should ensure flexibility in its proposal relative to these factors.”*

**Q2. Are there any offshore resources supporting the project?**

*A2. Both Oracle and PLCB have some offshore resources dedicated to the project. Any offshore resources must be vetted and approved in advance.*

**Q3. We are a certified small business from outside of Pennsylvania. Are we qualified as a Diverse and Disadvantaged Businesses (DBB) by PLCB?**

*A2. A DDB is any business that is proven to be diverse, veteran owned, or small based on the criteria set forth in Appendix F. Please see Appendix F for what is required to provide proof of such status.*

**Q4. Is there a formula in regard to how DDB points will be assigned to Offeror proposals, and if so can PLCB please now explain it?**

*A4. Please see RFP Section II-4, A, 1 (page 10) and Appendix F. There is no separate evaluation criteria or formula specific only to Diverse and Disadvantaged Business status for this procurement. To the extent an Offeror qualifies as a DDB, or is utilizing any DDB resources, the evaluation committee will consider the information provided as part of the Offeror’s overall qualifications.*

**Q5. What are the current Oracle ERP application and database versions (On-Prem)?**

*A5. The PLCB currently operates an on-premise Oracle Enterprise Resource Planning (ERP) application stack, comprised of multiple applications, databases, and utilities. This ERP stack supports six major functional departments with differing, and sometimes conflicting functionality and priorities. Specifically, the PLCB currently operates Oracle Enterprise Business Suite (EBS version 12.1.03), Retail Management System (RMS and SIM versions 13.2.8), Oracle Point of Service (POS version 14.0.1), Oracle Business Intelligence Enterprise Edition (OBIEE), Hyperion, Fusion Middleware Products and a considerable number of reports, interfaces, customizations, extensions, portal, and workflow objects (RICE-PW).*

**Q6. Can you describe what phases are in flight currently? Is Phase-1 (Finance) is completed?**

*A6. See Appendix G to the RFP, noting that since the RFP was issued, release 1.5 has been rolled into Release 2 for July 1, 2022.*

*Phase 1 (Finance) goes live Nov. 1, 2021, so we are currently working on both Release 1 (SIT, training, UAT, etc.) and Release 2 (build), with concurrent B2C and B2B e-comm development efforts.*

**Q7. Can you please define the timing for project Managers on the New Horizon Project? Are you looking to hire one or more PMs at the same time?**

*A7. The PLCB is looking to engage one or more project managers as soon as possible through August 2023, and we welcome Offerors' ideas and suggestions regarding an effective project management structure and number of personnel to support the project.*

**Q8. Can you please share the project team structure for New Horizon project? How the PLCB & Oracle/Deloitte/CMG are structured?**

*A8. Oracle is the prime contractor for the ERP project. Deloitte and CMG are acting as subcontractors to Oracle. PLCB has also contracted separately with RF Smart to enable a warehouse management solution at its licensee service centers. Working sessions are often collaborative amongst all teams (PLCB, Oracle, Deloitte, CMG, RF Smart), but ultimately Oracle is responsible for delivering a successful project.*

*There is a three-member steering committee made up of PLCB employees leading the project. Oracle has a program manager and engagement director overseeing many project managers and workstreams. All project tasks for all phases of the project are rolled into one master project plan managed and contributed to by many workstream leads. While the Project Manager(s) working pursuant to this RFP are expected to work collaboratively with all involved parties, they should do so on behalf of the PLCB.*

**Q9. Is the Change Management consisting of PLCB team? Or includes Oracle also?**

*A9. Oracle has contracted CMG for change management efforts, but PLCB is very involved in review and approval of change management plans, tactics and execution. Effective and efficient change management is a priority of Project New Horizon, and PLCB is investing nearly \$2.4 million specifically in change management for this project.*

**Q10. What are the Collaborating tools that are being used in the Project?**

*A10. PLCB has established a SharePoint site for project file sharing and collaboration, and Oracle, Deloitte and CMG schedule most meetings via Zoom.*

**Q11. Will this Project Management role act as the PM representing the PLCB responsibilities for Project New Horizon in support of Deloitte, Oracle, and Change Management Group Project Manager's or act in an oversight role? To whom will the contracted PM report?**

*A11. This project manager will be responsible for the tasks and responsibilities identified in RFP Section III-3, including oversight and management of PLCB-assigned tasks and regular communication with the PLCB steering committee and contracted program and project managers and workstream leads. Oversight of the project is the responsibility of the PLCB steering committee. The contracted project manager will report to the three-member PLCB Steering Committee.*

**Q12. What is the ideal timeline to move this on-premise application stack to the cloud?**

*A12. See the answer to Question 6.*

**Q13. The cloud that you are migrating to, is this a new platform or do you have existing applications on this cloud platform running?**

*A13. The PLCB is transitioning from an on-prem ERP to a cloud ERP, so this is an entirely new platform.*

**Q14. What is the extent of Oracle's role in the selection of a bidder?**

*A14. See the last paragraph of RFP section I-3. By way of further clarification, Oracle will not be involved in the scoring of any proposal or in vendor selection. Oracle will only be utilized as a subject matter expert to answer very specific questions that the evaluation committee may have when reviewing proposals.*

**Q15. What is the scope of PLCB owned tasks? This will help determine how much PM effort might be required.**

*A15. Master Project Plan will be made available upon request. This document reflects all PLCB-owned tasks. Please email Josh Greene ([josgreene@pa.gov](mailto:josgreene@pa.gov)) for access to a shared folder containing the document which will be updated as of October 5, 2021.*

**Q16. The RFP states that the bidder will, “Proactively manage PLCB resource priorities and accountability.” Describe the number of resources, types of resources dedicated now and in the future to the project.**

*A16. See the answer to Question 15.*

**Q17. How many resources has the PLCB dedicated to this project in total, and how many of those will be managed by the needed Project managers?**

*A17. The project manager will manage tasks within the plan to ensure PLCB resources are meeting expectations in relation to those tasks. There are dozens of PLCB business and IT resources involved in the project, all of whom also have responsibilities to keep day-to-day PLCB operations running. Resource limitations and contention are an acknowledged challenge to this project that is continually mitigated.*

**Q18. Has PLCB dedicated other resources to this project to complete the PLCB owned tasks?**

*A18. The PLCB has contracted some staff augmentation resources to assist with Project New Horizon.*

**Q19. What are the current number of active workstreams, or individual subprojects being managed?**

*A19. See the answer to Question 15.*

**Q20. The RFP states, “Collaborate with Oracle/Deloitte/CMG workstream leads and project managers to ensure alignment on project objectives and milestones.”**

**a. Does each company above have full-time, dedicated project managers to collaborate with?**

**b. Are those project managers responsible for providing timely and accurate updates?**

*A20. Yes, to both questions.*

**Q21. Describe the specific services needed to “manage” the PLCB resources.**

*A21. As noted in the RFP, the selected vendor must ensure PLCB business teams are engaged throughout the implementation to ensure effective and efficient management of PLCB-owned tasks within the comprehensive Project New Horizon Master Project Plan. The PLCB welcomes Offerors’ ideas and suggestions regarding effective project management services to support the project.*

**Q22. Will interim business processes need to be developed for the PLCB to operate between the distinct phases of implementation?**

*A22. No, the PLCB does not see the need for interim business processes at this time.*

**Q23. Describe the current reporting on the project. What reporting will become the responsibility of the PM to produce?**

*A23. Currently, Oracle and its subcontractors report project status and progress informally on a daily basis, raising critical issues to the PLCB steering committee as soon as they are discovered. Additionally, there is a weekly ½ hour touch-base with the Oracle Engagement Lead and Program Manager and a weekly 2-hour Steering Committee meeting including all Oracle/subcontractor workstream leads and project managers. To this point, the PLCB CIO has been reporting on PLCB tasks in both of those weekly discussions.*

*The PLCB welcomes Offerors' ideas and suggestions regarding effective project management reporting to support the project.*

**Q24. Are all projects in scope listed in the RFP Appendix G? Will any unidentified projects require a change order since this is a fixed price contract?**

*A24. Yes, all aspects of the project are reflected in Appendix G. Scope may increase and additional investments made only through a contractually established change order or amendment process.*

**Q25. The RFP states that, "In coordination with Oracle, create and manage cutover plan for each release in the implementation plan." Will the cutover plan include a fully tested end-to-end data conversion plan provided by Oracle?**

*A25. Yes.*

**Q26. Is a fixed price contract required? Will other contracting terms be considered?**

*A26. No. Per section I-12 of the RFP, no alternate proposals will be accepted. See section III-5 of the RFP to the extent there are any objections and/or additions to the standard terms and conditions provided in Part V. The Cost Sheet provided in Appendix E is the only Cost Sheet that will be accepted.*

**Q27. Does PLCB use OST resources for this project? If so, in what roles are OST resources utilized?**

*A27. Yes, three OST resources are java developers.*

**Q28. Would PLCB please confirm that the desire level of effort is greater than 1.0 FTE? If so, could PLCB provide an expected range to be provided by the selected consultant, based upon stakeholder planning to-date? For example, 1.25 or 1.50 FTE?**

*A28. See the answer to Question 7.*

**Q29. For purposes of completing the "Total Estimated hours for duration of Project" column in the Appendix E Cost Submittal Rate Card, what full month should be used as the starting month for the project?**

*A29. December 2021 is currently the targeted start date. Please note that no work can begin on the project until the contract has been fully approved by all required Commonwealth approvers and a Notice to Proceed is issued by the Issuing Office.*

**Q30. What methodology is being used, Agile or Waterfall?**

*A30. Primarily Waterfall.*

**Q31. Is Project New Horizon on schedule relative to the timeline depicted in Appendix G? If not, can PLCB provide information regarding the sources of the delay?**

*A31. At this point in time, there have been no delays, and none are anticipated. Release 1.5 has been rolled into Release 2 for implementation July 1, 2022 due to cost savings associated with that adjustment.*

**Q32. Will PLCB provide the current project RAID log for the benefit of Offerors? If not, can the PLCB describe key current Project New Horizon risks and issues?**

*A32. To view the RAID log, please email Josh Greene ([josgreene@pa.gov](mailto:josgreene@pa.gov)) for access to a shared folder containing the document as of October 5, 2021.*

**Q33. What factors have led to PLCB's seeking outside project management services for Project New Horizon at this time? Is there a reason PLCB did not contract for these services at the outset of the project?**

*A33. The PLCB employee that was engaged as the full-time project manager has departed Commonwealth employment. The PLCB currently does not have sufficient internal resources to manage the project effectively.*

**Q34. Should the cost proposal reflect costs through September 1, 2023? If PLCB elects to extend the contract beyond September 1, 2023, how will compensation for the extension be determined?**

*A34. Cost proposals should be for the period from December 1, 2021 through August 31, 2023. The PLCB does not anticipate need for a contract extension at this time. See also A29.*

**Q35. Will PLCB share a copy of the blueprint deliverable/artifact with firms interested in responding to this RFP?**

*A35. PLCB declines to share the Blueprint documentation at this time as it is not relevant to respond this RFP.*

**Q36. Is there an incumbent currently performing these services? If so, who is it?**

*A36. See the answer to Question 33.*

**Q37. Could you tell us what the proposed project budget would be for this RFP?**

*A37. No. As detailed in Part II of the RFP, the vendor with the highest overall score will be selected for negotiation. The PLCB has the discretion to reject all proposals or cancel the request for proposals at any time prior to the time a contract is fully executed when it is in the best interests of the Commonwealth.*

**Q38. “Opening Location: RFP openings are not public” – What does this mean?**

*A38. This solicitation utilizes the competitive sealed proposal method. This means that the proposals are not opened in a public forum. Only the Issuing Office, agency counsel, and the evaluation committee will view the proposals.*