MTA Procurement

DATE: 08/22/2023

NON-CONSTRUCTION CONTRACT SOLICITATION NOTICE

MTA- HQ IS NOW ADVERTISING FOR THE FOLLOWING:

SSE #: 0000444319	**OPENING/DUE DATE: 09/14/2023**
TYPE OF SOLICITATION: IFB	**DOCUMENT AVAILABILITY DATE: 08/22/2023**

SOLICITATION TITLE: **IT Timekeeping PM MGMT Professional Services**

DESCRIPTION: The MTA IT department provides IT services and support across all MTA agencies. During the fall of 2020, the MTA created a Technology Modernization Roadmap to strengthen the cybersecurity of its technology footprint and to support its vision of the IT department as the consolidated headquarters for IT resource planning and procurement across all agencies. As part of its commitment to the technology consolidation, modernization, and standardization (CMS) program— the MTA IT department seeks to improve business practices that will provide better value to MTA IT and MTA client agencies. The Dimensions upgrade project is a significant undertaking for the MTA. After successfully upgrading the MTA's Kronos Timekeeping system, a subsequent update to the Dimensions environment is now necessary. Dimensions is a cloud-based successor to Kronos iSeries and offers enhanced functionalities to efficiently track employee time, manage compliance requirements, improve productivity, and reduce costs. Dimensions offers automatic security patches, AI workforce solutions, and cloud-based natures which provide quick and responsive insights. Dimensions is accessible via kiosks, time clocks, phones, tablets, web-based employee self-service portals, and the Dimensions app. Dimensions also offers customized reporting functionalities tailored to company needs. In every sense, Dimensions is a complete upgrade from Kronos and a worthwhile successor. The engagement proposed in this SOW supports the MTA in managing the Dimensions Upgrade project. Vendors will take a product organization approach to this engagement, prioritizing the ultimate product that is being delivered and centering their work on the needs of the ultimate product customers. As program manager, vendors will institute the dedicated management structures and provide the resources necessary to properly execute the Dimensions ugrade.

Funding: 100% Operating   Goals: N/A   Est $ Range: $5M - $10M   Contract Term: 4 Years

****PLEASE SEE THE ATTACHED SOW FOR ADDITIONAL INFORMATION****

(x) PRE-BID CONFERENCE   **DATE: 08/31/2023**   **TIME: 10:00AM**

Virtual via Microsoft Teams- Please contact the assigned procurement representative ad cindy.toppin@mtabsc.org to register

( ) SITE TOUR   N/A   **DATE:**   **TIME:**

PLACE:

FOR MORE INFORMATION, PLEASE CONTACT:

PROCUREMENT REPRESENTATIVE: Cindy Toppin   **EMAIL: cindy.toppin@mtabsc.org**

MTA INFORMATION TECHNOLOGY
SCOPE OF WORK FOR
PROESSIONAL ENGAGEMENT

SUMMARY	
Project:	MTA DIMENSIONS PROJECT MANAGEMENT
Duration in months:	48 MONTHS
Reports to IT Division and Unit:	DEPUTY CHIEF WORKFORCE PRODUCTS
Reports to IT Project Manager:	PRAVEEN NARAYANASETTY
Work Location:	2 BROADWAY, NYC—MTA HQ
Desired Start Date:	OCT. 16, 2023

Critical Key Requirements
• Vendor has proven experience managing UKG Dimensions upgrades for at least 3 large-scale organizations with 5K+ employees, including government and/or public-sector environments.
• Vendor has 10+ years' experience providing high-level Kronos migration and management services for organizations with large-scale infrastructure (more than 900 apps, 30K users, or 10K employees).
• Vendor has provided UKG Dimensions managed services for a major metropolitan transportation authority.
• Vendor has the demonstrated ability to plan, execute, and manage multiple, complex IT projects with overlapping deadlines.
• Vendor is part of the UKG partner network.
• Vendor is familiar with the specific compliance and security requirements of our state government organization.
• Proposed vendor resources have 5+ years' experience in project management oversight (PMO), change management, and/or independent verification and validation (IV&V) for Kronos timekeeping systems.
• Proposed vendor resources can accommodate EST working hours.
• Proposed vendor resources can travel onsite to work with MTA during key milestones.
• Proposed vendor resources have a minimum of 3 years' recent certification by Kronos in the discipline proposed.

1. Introduction

The Metropolitan Transportation Authority (MTA)—North America's largest transportation system—serves a population of 14.6 million people in the 5,000-square-mile area fanning out from New York City through Long Island, southeastern New York State, and Connecticut. The MTA is a public-benefit corporation that provides transportation services in the New York Metropolitan region through its operating agencies: New York City Transit, Long Island Rail Road, Metro-North

Commuter Railroad, MTA Bus Company, Bridges & Tunnels, MTA Police, and Construction & Development.

The MTA IT department provides IT services and support across all MTA agencies. During the fall of 2020, the MTA created a Technology Modernization Roadmap to strengthen the cybersecurity of its technology footprint and to support its vision of the IT department as the consolidated headquarters for IT resource planning and procurement across all agencies. As part of its commitment to the technology consolidation, modernization, and standardization (CMS) program—the MTA IT department seeks to improve business practices that will provide better value to MTA IT and MTA client agencies.

2. Scope of Work

2.1. Introduction

The Dimensions upgrade project is a significant undertaking for the MTA. After successfully upgrading the MTA's Kronos Timekeeping system, a subsequent update to the Dimensions environment is now necessary. Dimensions is a cloud-based successor to Kronos iSeries and offers enhanced functionalities to efficiently track employee time, manage compliance requirements, improve productivity, and reduce costs. Dimensions offers automatic security patches, AI workforce solutions, and cloud-based natures which provide quick and responsive insights. Dimensions is accessible via kiosks, time clocks, phones, tablets, web-based employee self-service portals, and the Dimensions app. Dimensions also offers customized reporting functionalities tailored to company needs. In every sense, Dimensions is a complete upgrade from Kronos and a worthwhile successor.

The engagement proposed in this SOW supports the MTA in managing the Dimensions Upgrade project. Vendors will take a product organization approach to this engagement, prioritizing the ultimate product that is being delivered and centering their work on the needs of the ultimate product customers. As program manager, vendors will institute the dedicated management structures and provide the resources necessary to properly execute the Dimensions ugrade.

Vendors will structure their project management activities around the following two workstreams:

1. Technical Project Management Oversight (PMO)
2. Independent Verification and Validation (IV&V)

Technical PMO focuses on establishing the project governance structures, activities, and artifacts necessary to manage the Dimensions upgrade on a day-to-day basis.

A strong and central project management structure is a key success factor in managing complex projects. A collaborative effort to support the project team focuses on providing appropriate coordination, communication, risk management, issue resolution, project reporting, and benefits management across workstreams, functions, and stakeholders. The coordination and governance provided by a sound project management methodology will significantly reduce the number and impact of surprises to the MTA management team.

PLEASE NOTE:

1. MTA may elect to award a vendor one or both workstreams.
2. If Vendor is awarded a part or whole of this scope, they are ineligible to bid on other procurements related to this specific Dimensions integration and rollout.

These following governance tenets must guide the vendor's PMO, assessments, and deliverables:

Key Tenets	Description
Baseline	Establish the basis for project governance, approval and measurement – including the definition of roles and accountability, policies and standards, and associated processes
Scope	Control the scope, defined as the overall project value, and manage the portfolio of initiatives that impact the scope and resources it requires
Monitor	Monitor the project's progress via clear reporting mechanisms, stakeholders' commitment, results achieved, and management of risks
Measure	Measure the outputs, outcomes, benefits, and value – against both the plan and measurable expectations
Guidance	Act to 'steer' the project into the organization. This involves removing obstacles, managing the critical success factors, and remediating project or benefit-realization shortfalls
Knowledge Transfer	Develop the organization's project delivery capability — continually building and enhancing its ability to deliver more complex and challenging projects in less time and for less cost while generating the maximum value
Speed	Support rapid decision-making based on facts

2.2. Technical PMO: Specific Responsibilities

1. **Technical Planning**: The PMO vendor is responsible for developing a detailed technical project plan that outlines the implementation approach, technical milestones, dependencies, and resource requirements. This plan ensures that technical tasks are well-organized and align with the overall project timeline.

2. **Vendor Management**: The PMO vendor will assist the MTA in choosing other technical vendors to carry out the Dimensions upgrade. The PMO vendor serves as the primary interface between the MTA implementation team and other technical vendors. They coordinate activities, resolve technical issues, and ensure that the vendors deliver their commitments as per the project requirements.

3. **Technical Requirements Gathering**: The PMO vendor works closely with the business and technical stakeholders to gather and document the technical requirements of the Kronos timekeeping system. These requirements are critical to configuring and customizing the system to meet the organization's needs.

4. **System Integration**: In MTA, multiple systems and applications are integrated with Kronos timekeeping. The PMO vendor oversees the integration efforts, ensuring that data flows smoothly between systems and existing interfaces are properly running and if any new interfaces need to be implemented, ensure requirements are properly documented.

5. **Data Migration**: Data migration is a crucial aspect of MTA Kronos dimensions upgrade. As part of the consolidation efforts, the PMO vendor ensures that the data from existing systems is accurately migrated to Kronos Dimensions without any loss of information.

6. **Testing and Quality Assurance**: The PMO vendor oversees the testing process, making sure that all technical aspects, including integrations, customizations, and data migration, are thoroughly tested for functionality, accuracy, and performance and technical issues. The technical PMO vendor plays a key role in identifying and resolving these issues promptly to prevent delays and minimize risks.

7. **Risk Management**: The PMO vendor identifies potential risks, develops mitigation plans, and monitors risks throughout the project lifecycle.

8. **Governance**: The PMO vendor establishes technical governance processes to ensure compliance with best practices, standards, and architectural guidelines.

9. **Performance Monitoring**: Post-implementation, the PMO vendor monitors the system's performance, addresses any performance bottlenecks, and ensures the system meets its expected performance levels.

10. **Change Management**: The PMO vendor assists in managing technical changes effectively by ensuring proper documentation, communication, and training for impacted stakeholders.

2.2.1. Project Onboarding

The vendor's team will need to properly onboard and perform further planning in partnership with the MTA to ensure they understand stakeholder needs and expectations. These activities will lay the groundwork for a structured and well-informed engagement. Key activities during project onboarding are:

- *Establishment of project goals:* Facilitate interviews and discussions with MTA stakeholders to better understand and document the project goals and objectives (e.g., what are the desired outcomes, and how will success be measured)

- *Identification of key internal and external stakeholders and define RACI:* Determine resources for each project area spanning internal MTA staff, Implementation Vendor, and externals parties (e.g. Interface owners, pensioners, etc.). Define what roles and responsibilities these stakeholders will have throughout the project.

- *Formalization communication protocols:* Define team structure, communication protocols (e.g., weekly status meetings, Steering Committee meetings), reporting templates, and other communication standards

- *Identification of external dependencies:* Determine other MTA initiatives that the project must take into account.

- *Finalization of a work plan:* Develop a more detailed project timeline that outlines specific activities, activity phasing, meeting cadence, deliverable criteria, etc.

2.2.2. Establishing Project Management Structures

Once onboarding is complete, the vendor will support the MTA in establishing project management structures that will be leveraged for the remainder of the project. These include the creation of the charter, formalizing the project management roles and responsibilities between The vendor, the MTA, and the implementation vendor, establishing risk/issue/key decision processes, and routine and executive reporting. Key activities include:

- *Provide coordination support*: Support the MTA as the project management lead for collaborating with stakeholders, coordinating meetings, facilitating subcommittee communications, and escalating challenges as they arise

- *Draft the governance body charter:* Define roles and responsibilities for members and establish procedures for the governance body

- *Coordinate communications:* Draft meeting notes detailing discussion topics, key decisions, unresolved issues, and action items according to assigned responsibilities and disseminate to project members and oversight stakeholders

- *Support refinement of project prioritization criteria:* Refine prioritization criteria to evaluate projects holistically based on addressable need and impact on modernization goals

- *Support development of a resource allocation strategy*: Plan a strategy based on dedicating resources by function for day-to-day operational needs and longer-term modernization initiatives

- *Establish processes for re-evaluating timekeeping needs and amending roadmap:* Assist with developing a process for re-evaluating priorities due to potential shifts in the urgency of needs and priorities that may require resequencing projects

2.2.3. Ongoing Project Management Oversight

After the project management structures are established, the vendor will continue to provide execution, coordination, and communication in support of these structures throughout the life of the project. The vendor will also offer strategic advice on project progress, goals, and any other challenging aspects that arise. This phase includes the following activities:

- *Provide ongoing support as program manager:* Continue support once the governance body has been established through the initiative's completion

- *Monitor progress towards Dimensions goals:* Collaborate with stakeholders and governance subcommittees to provide weekly progress updates

- *Support MTA in developing KPIs to measure progress:* Collaborate with the project management team to identify KPIs and develop a system for tracking and reporting

- *Execute clear and direct communications and reporting:* The vendor will conduct robust status reporting discussions to communicate findings from across the project to communicate implementation progress and to highlight risks, issues, or dependencies that may impact project health

2.2.4. Change Management

The PMO vendor will develop and execute on a targeted communications strategy and change management plan to ensure all users have the tools they need to navigate the new platform. seamlessly and without confusion. The change management work will follow five phases:

- *Phase 1: Research:* Conduct a change readiness assessment to understand the MTA's readiness for the implementation and the potential impact of this change, and to inform the risk mitigation plan. Ensure all relevant stakeholders are identified.

- *Phase 2: Plan:* Synthesize stakeholder research into a Stakeholder Engagement Strategy. Work closely with key leaders and stakeholders to define an ideal future state and develop a change management plan with a detailed vision and strategy that will enable the MTA to realize all the benefits of the solution.

- *Phase 3: Realign:* Utilize the work done in the previous phase to translate the OCM plan into a communications plan and training plan and build change agent networks.

- *Phase 4: Engage:* Work with senior leaders and change agent networks to execute the change plan and measure against key performance indicators (KPIs) to evaluate progress and performance.

- *Phase 5: Reinforce:* Review, iterate on, and continuously improve our enterprise level framework by incorporating feedback and lessons learned and delivering a knowledge transfer guide to support ongoing change management efforts.

2.3. IV&V: Specific Responsibilities

The IV&V workstream consists of risk monitoring, process improvement, and software development oversight to drive quality outputs that meet the MTA's goals, manage project risks, and maintain transparency through open communication with stakeholders. The IV&V vendor will implement the following key activities to ensure project artifacts and deliverables are maintained at the highest possible level of quality and according to relevant and applicable standards.

1. *Identify and review*: The IV&V vendor will review the current system requirements and proposed solution, review solicitation documents, business process documents, artifacts, and review any requirements related to the Dimensions upgrade project. In addition to document and artifact reviews, the vendor will identify which quality standards are most relevant to the Dimensions project and determine how to satisfy them, including identifying quality roles, responsibilities, resources, quality processes and procedures, and quality standards, practices, and metrics as part of the project initiation and ongoing project governance and oversight efforts. Interviews with key stakeholders to surface and align quality assurance expectations and standards will also help the vendor establish strong quality management.

2. *Verify and validate*: The IV&V vendor will verify and independently confirm that the Dimensions Implementation Vendor meets the fidelity of all defined processes in all phases of the project. Key IV&V tasks include:

   a. Verify and independently confirm that the quality of all products produced by the project is monitored by formal reviews, approvals, and department sign-offs.

   b. Monitor, verify and approve with MTA that the resource allocations and schedules of other implementation vendors are adequate to meet the project activities.

   c. Evaluate project progress, resources, budget, schedules, workflow, and reporting monthly.

   d. Assess coordination, communication, and management to verify all vendors and the MTA are not working independently of one another and they are following the communication plan.

3. *Report and communicate*: The IV&V vendor will report evaluative findings related to the contract artifacts, plans, and business process future state. The vendor will provide observations, identify risks, and spotlight issues that are discovered and make associated recommendations for improvement, mitigation, and resolution.

2.4. Deliverables

MTA is engaging the vendor to provide the following deliverables:

- **Detailed scope document**: In the first month of onboarding, the vendor will create a detailed scope document with the list of activities and deliverables for project execution. This will be a PowerPoint or Word format.

- **Monthly progress reports**: Report detailing the progress of ongoing Dimensions upgrade project initiatives, key governance decisions, project timelines moving into the future for the initiatives, and successes, barriers, and risks.

2.4.1. Deliverable Acceptance

The MTA will designate an MTA Project Manager for the entire length of the work. Deliverable acceptance will be in accordance with the following:

- **Deliverable Submission**: The vendor will submit an email to the MTA Project Manager, indicating the services that were completed and include copies of the completed deliverables:

- **MTA Review and Acceptance:** MTA Project Manager will review and provide feedback within four (4) business days of deliverable submission. The count of business days will begin on the first business day following the MTA's receipt of the vendor's deliverable submission. MTA Project Manager will provide email notification of:
    - Deliverable acceptance within the four (4) business days.
    - Detailed rationale for non-acceptance, including additional edits and/or updates requested based on this Statement of Work.
    - If the MTA Project Manager still deems the deliverables unacceptable after the vendor's revisions, deliverable acceptance will be escalated to the MTA Steering Committee for further evaluation.
    - If no reply is provided by the MTA Project Manager within four (4) business days, The vendor will send a follow up email and the MTA Project Manager will be given an additional three (3) business days to advise on deliverable acceptance.
- **Revisions:** The vendor will have two (2) business days (or other mutually agreed upon period) to complete requested updates and revisions. The count of business days will begin on the first business day following the vendor's receipt of the MTA Project Manager written statement of requested updates.

3. Qualifications (Compliance)

Please discuss your organization's ability to onboard and allocate resources in order to successfully fulfill the scope of work detailed in section 2.2-2.4 above within the specified duration. Discuss the qualifications and experience of your company as well as proposed staff.

To be considered, the vendor must

- be a US company with extensive experience and a proven track record managing Dimensions deployments in very large organizations.
- have sufficient qualified, experienced onshore resources to execute this project.

Include a staffing plan with resumes of key personnel and a project organizational chart. Specifically, address your ability to meet the following requirements:

- The vendor will deploy a skilled, experienced project manager (PM) for its project team. The PM will work under, report to, and interface with a designated MTA IT project manager.
- Proposed vendor resources must have 5+ years' experience in UKG Dimensions upgrades for at least three customers that are enterprises with more than 5,000 employees.

PLEASE NOTE:
1. Note that the MTA reserves the right to scale up or down resources as it deems fit.
2. Staff changes must be reviewed and approved by MTA IT project manager.

4. Other Fees and Payment Schedule

Use the Price Schedule attachment included in the bid packet to provide a breakdown of anticipated project costs and other commercial terms.

The vendor must provide services on time and materials basis; only time and material proposals will be entertained by the MTA. MTA IT reserves the right to convert this order or any part of this order to another compensation approach.

Invoicing for work documented as complete will be done monthly via the current MTA IT processes. This is a flat rate Professional Services contract. At the end of each month, a calculation of the agreed rate will be assessed and invoiced to MTA IT for review and approval. Payments will be processed on a monthly basis as approved in MTA system.

5. Deliverance Acceptance Criteria

The submitted proposal must explain all assumptions, conditions, exceptions, and/or limitations.

Provide any assumptions made in establishing contingency estimates and project staffing, including efficiency factors.

6. Other Required Information:

1. Will the vendor be required to be onsite? YES
2. Is the vendor exposed to any confidential information? YES
3. Are there cybersecurity requirements? YES (Please review the MTA Cybersecurity Requirements and Terms and Conditions Attachments.)

7. Other Required Information:

Vendor submission **MUST** include filling out the PMO Vendor Qualification Questionnaire attached.