Program and Project Management Information System

State of Hawai’i
Office of Information Management & Technology

RFI for Program and Project Management Information System Solutions

November 16, 2012
1. Background and Purpose

This RFI is for planning purposes only. It is neither a solicitation notice nor a Request for Proposals. Responses to the RFI are not offers and cannot be accepted by the State of Hawai‘i to form a binding contract. This RFI shall not limit any rights of the State, and the State reserves all its rights including but not limited to its right to elect not to procure the goods and/or services that are the subject of this RFI and its right to procure them from a vendor that has not responded to this RFI.

The State of Hawaii’s Office of Information Management and Technology (OIMT) is establishing an enterprise program management office (ePMO) to support the business and IT transformation initiatives that will be taking place over the next decade in support of the State of Hawaii Business and Information Technology/Information Resource Management Transformation Plan (http://oimt.hawaii.gov/). The ePMO will perform two functions – providing program and project management services to projects being executed directly by OIMT, and serving as a Center of Excellence for business and IT/IRM transformation projects throughout the State government by providing expertise, templates, tools, and other support to project managers. One key aspect of the ePMO will be a centralized project management and reporting system which will improve project management by standardizing and streamlining various PM-related tasks, and it will allow OIMT to monitor the enterprise’s investment portfolios, programs, and projects via a common dashboard. The objective is to utilize existing resources and solicit assistance in configuring available software, while supplementing such software solution with social media and collaboration components that will enable improved state-wide and agency-specific administrative project and program management business processes.

2. Existing and Upcoming Factors to be considered:

The State of Hawai‘i OIMT has already procured some resources that need to be leveraged when crafting a PMIS solution. These are:

a) Cloud-based Enterprise SharePoint 2010 (approx. 100 licenses at the moment)
b) Cloud-based Enterprise Project Pro Server 2010 (approx. 20 licenses at the moment)
c) The State must leverage these existing resources (AS ABOVE) and migrate them to on-site servers
d) The State envisions 40 main project managers
e) The State envisions 200 project contributors
f) We envision placing 10 large projects (5000 activity list items), 50 medium projects (15000 activity list items) and 100 small projects in a calendar year
g) Collaboration must also be implemented in our SharePoint instance enabling both individual contributors and projects teams to easily share ideas and documents which may include blogs, wikis, RSS
h) Configurations, templates and any other features developed need to seamlessly upgrade to Project Server 2013
3. Users (scope)

The scope of this solution will cover all departments that become stakeholders and, potentially, outside contractors (vendors) in particular projects or programs. With various levels of access, each state employee will need to communicate and collaborate in this environment within the state network and via remote access.

4. Management

The State seeks to establish an automated portfolio, program, and project governance and management structure via a Project Management Information System (PMIS) that combines templates, workflows, configurations, etc. that will enable portfolio, program, and project managers to record, analyze, and track the information relating to the status and progress of their projects, and which will serve as a model for newly-established projects and programs. Best practices, standards and modern tools should be incorporated into the system. Additionally, the PMIS should allow for multiple project methodologies to be utilized within the same platform. The solution needs to include the following:

a) Portfolio Management – multi-dimensional analysis of programs and projects across the enterprise
b) Program Management – aggregation of a set of related projects
c) Project Management – cost, schedule, performance, scope, risk
d) Dashboards – “live” data extracted from PMIS and presented in a variety of ways to managers and executives, with customization and drill-down capabilities
e) Bug Resolution Logs and Tracking System
f) Help Desk Functionality
g) Requirements Tracking

5. Social Media

In addition to the configuration of Project Server, the state seeks to purchase and add on software that will seamlessly integrate with it and SharePoint, and provide a layer of social media and network collaboration. Products such as Yammer, Mango and other similar ones can be used to overlay tools that lend themselves for the development of maximum engagement from stakeholders.
6. Objectives

The management solution should include the following, at minimum:

**Portfolio Management**
- Visual design and configuration of portfolio management view for executives and department heads and portfolio manager (PfM)
- Design of dashboards for executives and department heads
- Design and implementation of project/program workflow from idea/concept with phase gates through closeout
  - Recommendation and implementation of Share Point standard Portfolio management best practices based on previous experiences.
- Mobile access

**Program Management**
- Design of dashboards for Program Manager (PgM)
- Design of program management site(s) template
  - Recommendation and implementation of Share Point standard Program management best practices based on previous experiences.
- Mobile access

**Project Management**
- Design of dashboards for Project Manager (PM)
- Design of project management site template
  - Requirements Management Workflow
  - Risk Management Workflow
  - Issue Management Workflow/Alerts
  - Standard Document Structure (workflow for adding documents that does not create folder structures and enhances search capabilities)
  - Recommended document naming conventions and associated metadata
  - Stakeholder communication workflow/alerts
  - Status Report Workflow (Project health – time, cost, resources)
  - Recommendation and implementation of Share Point standard project management best practices based on previous experiences.
- Mobile access

**Training**
- How to modify templates and workflows
- How modify dashboards
- How to modify portfolio views
7. RFI Response Format and Process

The State is requesting vendors interested in providing information about potential approaches, solutions and related services to submit a response containing the following information:

A. Provide a concise description of vendor profile, history and general business strategy. Include top three to five dominant trends in PMIS solutions and related collaboration tools.

B. Describe vendor products that cater to comparable organizations of similar size.

C. Provide at least three (3) samples of formal partnerships established, if any, with third-party consulting organizations to deliver PPM governance services via SharePoint and Project Server.

D. Provide high-level observations on best practices and ePMO governance.

E. Discuss any factors relevant to the success of ePMO governance within SharePoint and Project Server, as well as social media tools that seamlessly integrate with this solution.

F. Provide examples of other successful implementations and the elements that made it successful.

OIMT may invite organizations to make oral presentations, participate in individual question-and-answer sessions, or participate in other fact-finding activities OIMT may determine to be necessary concerning their responses. Organizations should indicate in their responses whether they are willing to participate in these sessions. All organizations that have the interest and capacity to fulfill the activities specified in this RFI should respond no later than December 7, 2012, 2:00 p.m. (HST).

The State reserves the right to incorporate in a solicitation, if issued, any recommendations presented in the response to the request for information.

7.1. Targeted Schedule of Events

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFI Issue Date</td>
<td>November 16, 2012</td>
</tr>
<tr>
<td>RFI Due Date/Time</td>
<td>December 7, 2012, 2:00 pm (HST)</td>
</tr>
<tr>
<td>Oral Presentation, Q&amp;A, Fact Finding Activities</td>
<td>December 12, 2012</td>
</tr>
</tbody>
</table>


8. RFI Submission & Point of Contact

Direct RFI responses and questions regarding this RFI in writing to the following point of contact:

Ms. Paola Saibene
Senior Enterprise IT Program Manager
Office of Information Management and Technology
1177 Alakea Street, Room 305
Honolulu, HI 96813
808-586-1930 ext.545
Paola.Saibene@hawaii.gov

All written responses shall be submitted by email in either MS Word or PDF format to the address provided above. Please limit your responses to 100 pages.

Respondent shall also submit one (1) copy clearly marked “For Public Inspection.” This copy should not include information that the respondent deems to be Trade Secret or Confidential Information. This copy will be made available to the public, if requested.

The State shall not provide any reimbursement for the cost of developing, presenting, submitting, or reviewing any information in response to this RFI.