

Project and Portfolio Management Software Provider Request for Information

State of Florida
Department of Revenue - ISP
Request for Information
FDOR PPM Tool
RFI - #14/15-05

1. Introduction

The Florida Department of Revenue (the “Department” or “FDOR”), hereby issues this Request for Information (RFI) seeking information from interested parties who can provide project and portfolio management (PPM) technology to the Department.

The goal of this RFI is to provide the Department with the latest information on PPM technology for the purpose of improving project and program management tracking and performance across the enterprise.

2. Purpose of an RFI

Rule 60A-1.042, Florida Administrative Code, provides that an agency may request information by issuing a written RFI. Agencies are authorized to use an RFI in circumstances including, but not limited to, determining whether or not to competitively procure a commodity or contractual services, determining what solicitation process to use for a particular need, or researching general, special, and/or technical specifications for a solicitation. A vendor’s response to a RFI is not an offer and the agency may not use the vendor’s submission to justify a contract with that vendor without otherwise complying with Chapter 287, Florida Statutes (F.S.) and Rule 60A-1.042, F.A.C. Vendors submitting a response to an agency’s RFI are not prohibited from responding to any related subsequent solicitation.

Any future purchase of the services will be conducted in accordance with Chapter 287, F.S. The Department may use responses to this RFI to prepare one or more competitive solicitations and as the basis for any subsequent vendor meetings.

3. Requirements

The PPM technology must have the following capabilities:

- 3.1. Project Demand Collection and Management, including:
 - Standardized, automated project request collection
 - Business case development

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- Proposed solution direction
 - Resource impact analysis
 - Capacity planning features
 - Prioritization and sequencing
 - Ability to integrate with 3rd party tools
- 3.2. Resource Management
- Resource identification
 - Resource availability
 - Planned utilization
 - Resource approval workflow capabilities
 - Ability to integrate with 3rd party tools
- 3.3. Portfolio Management
- Program management
 - Ability to link resources, capabilities and services
 - Ability to integrate with 3rd party tools
- 3.4. Project Management
- Charter development
 - Staffing plan
 - Different levels of project management rigor
 - Work breakdown structure
 - Work plan (task management), including:
 - standard work plan templates for expected project types and project management rigor
 - alerts and notifications for deviations
 - Ability to support planning by duration OR effort
 - Issue and Risk Management
 - Agreement Change (scope, resource, timeline, solution, etc.)
 - Status Reporting – Executive Level and Project Level
 - Baseline and Baseline version control
 - Ability to integrate with 3rd party tools
 - Ability to update activity status via e-mail, web or Outlook tasks
- 3.5. Time Management
- Project and Task-based timesheets
 - Timesheet approval workflow
 - Staff utilization plan vs. actual timesheet reporting
 - Ability to integrate with 3rd party tools
- 3.6. Reporting
- Ability to define key metrics
 - Dashboard access

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- Web access
 - Automation of updates/distribution
 - Built-in financial metrics: earned value, NPV, IRR, options valuation
 - Ease of use/access/update
 - Customizable interface depending on user type
- 3.7. Integration Capability with 3rd party tools:
- Quality Assurance
 - Financial and Asset Management
 - Requirements Management
 - IT Service Management
 - Change Management
 - Incident Management
 - Problem Management
 - UCMDB
 - Service Catalogue
 - SharePoint
- 3.8. PMI and ISO/IEC Consistency
- Must be consistent with PMI framework and ISO/IEC standard
- 3.9. Hosting and Support
- 24/7 availability
 - Self-service capabilities

4. Response Content

Please answer each of the following. Please use the corresponding number, e.g. 4.1, 4.2 and then your response.

- 4.1 Please provide your solution pertaining to the above-listed requirements. Include all platform offerings (cloud, on-prem, hybrid, etc.) Do NOT include pricing in your response.
- 4.2 Please provide your offerings on implementation, customization, migration and training for the solution.
- 4.3 Please provide your pricing methodology for your solution (i.e. your basis for charging), but do NOT include actual pricing in your response.
- 4.4 Are you currently on any of the following contracts or any other governmental contract that permits cooperative purchasing? (State of Florida State Term Contract with the Florida Department of Management Services, U.S. Communities Contract, GSA Schedule 70 Contract with a cooperative agreement, etc.)
If so, please provide the applicable contract number.

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5. Submission of Response

All responses are due by October 10, 2014 at 5pm EST.

Send responses to:

Please e-mail the response to Sarah Fixel at fixels@dor.state.fl.us, CC: weyantm@dor.state.fl.us

Label your response **RFI #14/15-05 FDOR PPM Tool**

6. Additional Information

- 6.1. This is a Request for Information (RFI) and should not be construed as intent, commitment or promise to acquire or purchase the proposed services presented by vendors.
- 6.2. The Florida Department of Revenue will not be obligated to any vendor as a result of this RFI. The Department is not obligated for any cost incurred by vendors in the preparation of their response to this RFI. The Department will not pay for any information herein requested nor be liable for any costs incurred by the vendor.
- 6.3. This RFI is being submitted strictly for the purpose of gaining knowledge on services available on the market for the provision of these services, related services, and options available.
- 6.4. From the information collected through this RFI, the Department will review all information and options related to the services, related services, and desirable options.
- 6.5. At a later time, it is anticipated that the Department will release our requirement through the formal bidding process or through a certified alternate contract source.
- 6.6. All information obtained shall become the property of the Department upon receipt and will not be returned. The Department cannot guarantee that it will not be compelled to disclose all or part of any public record under the Florida Sunshine Law.
- 6.7. In the RFI, the Department has addressed a series of questions to vendors, and request that vendors reply to the Department in the same sequence and format.
- 6.8. The Department also invites vendors to submit any pertinent information that the Department should consider, including topics that were not included in this RFI but are relative to the same subject area.
- 6.9. The Department requests that all vendors submit responses that are short, clear, concise and complete.
- 6.10. Submitting a response to this RFI does not exclude any vendor from submitting a response to a solicitation as a result of the information collected from this RFI.