



Project Portfolio Management System (PPMS) RFI 13-2387

Metro Project Management Department

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Portland, OR 97232
503-797-1700

Procurement Analyst

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Notice is hereby given that proposals for RFP 13-2387 for Project Portfolio Management System (PPMS) shall be received by Metro, 600 NE Grand Avenue, Portland OR 97232 until close of business on April 26, 2013. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. Proposers shall review all instructions and contract terms and condition.

Table of Contents

I. EXECUTIVE SUMMARY

II. BACKGROUND / HISTORY OF PROJECT

III. PROPOSED SCOPE OF WORK

IV. IMMEDIATE BUSINESS REQUIREMENTS

Challenges

Requirements

V. BUSINESS APPLICATIONS FOR FUTURE ROLL-OUT

Challenges

Requirements

VI. RESPONSE CONTENT

VII. RESPONSE INSTRUCTIONS

APPENDICES

I. EXECUTIVE SUMMARY

Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting information for a Project Portfolio Management System (PPMS). Responses will due as indicated on the RFI cover page.

Metro recently developed a Construction Project Management Office (cPMO) to oversee its construction project portfolio and foster sound project management practices. The intent of this Request for Information is to find a project portfolio management solution to support the cPMO and to subsequently implement Metro's first ever PPMS.

Metro is a large government agency with many unique business lines. There is great interest in applying the PPMS solution to other Metro departments. As such, two applications are presented in this RFI: one for the immediate business case for the cPMO, and another for future build-out of the system among other departments. The success of the cPMO application will solidify the business case for using the PPMS in other Metro departments.

This Request for Information (RFI) is intended to gather data from the vendor community in preparation of a potential procurement in fiscal year 2013-2014. As a result of information obtained through this RFI, Metro may enter into direct negotiations with potential vendors or issue a competitive procurement in the future.

All vendors who support a PPMS solution are welcome to respond to this request including those that manage software implementations through a partner network with the software owner.

After review of responses, Metro may select firms to demonstrate their products. These firms will be asked to follow a test script provided by Metro in advance of the demonstration.

II. BACKGROUND / HISTORY OF PROJECT

Metro is a regional government with many different business lines. Metro has about 740 FTE and a total budget of about \$536 million. Metro owns an assortment of “visitor venues”: the Oregon Convention Center, the Portland Exposition Center, the world class Oregon Zoo, and Portland’s premier arts and performance stages collectively known as the Portland Center for the Performing Arts. Metro owns and manages several regional parks, natural areas, and pioneer cemeteries. Additionally, Metro manages the region’s solid waste transfer stations and household hazardous waste collection facilities. Metro is also responsible for long-range planning and has a robust GIS and Data Research Center. All of these services are supported by internal functions of finance, information services, legal, communications, facilities management, and the Metro Council and Auditor offices.

Having such a diverse portfolio of programs and properties, Metro engages in many projects that differ in type, length and management needs. Over the past several years, Metro has grown its project management capabilities through trainings and required processes. Most recently Metro developed a cPMO which is responsible for governance and project management of construction projects at its visitor venues, parks, cemeteries, solid waste / hazardous waste facilities, and its headquarters at the Metro Regional Center (MRC).

III. PROPOSED SCOPE OF WORK

The intent of this Request for Information is to determine the best solution and estimated costs for implementing a PPMS for the cPMO. This information will be used to develop a budget request with implementation to occur in fiscal year 2013-2014.

Metro would like to automate its basic project management and portfolio reporting requirements, starting with the immediate needs of the cPMO. Metro seeks a scalable and modular PPMS that will support an incremental approach to installing PPMS software and developing the business processes that support it. While Metro is initially looking to procure a PPMS solution to support its cPMO projects and portfolio, Metro would like to grow more complex project management capabilities into its PPMS over time to accommodate needs of its other departments. These needs include human resource planning, detailed schedule and budget /cost management, and interfaces with its financial and timekeeping systems.

IV. IMMEDIATE BUSINESS APPLICATION TO THE cPMO

The cPMO is located within Metro’s Parks and Environmental Services (PES) Department and is charged with managing Metro’s portfolio of construction projects which includes major maintenance, renovation and capital improvement projects. These construction projects are related to properties and programs within PES (solid waste, parks, cemeteries, MRC) as well as within other Departments (the Oregon Zoo, PCPA, Oregon Convention Center, Exposition Center, Sustainability Center). Since the cPMO does not use any unified software to track its projects, it is unlikely that any data would be electronically migrated to the new system. Appendix A includes an organization chart of Metro.

Figure 1 illustrates the relationship between the cPMO and Metro Departments. Departments are not co-located and may use different network drives. Table 1 estimates the number and roles of PPMS users for cPMO projects.

Figure 1. Metro cPMO Project Portfolio

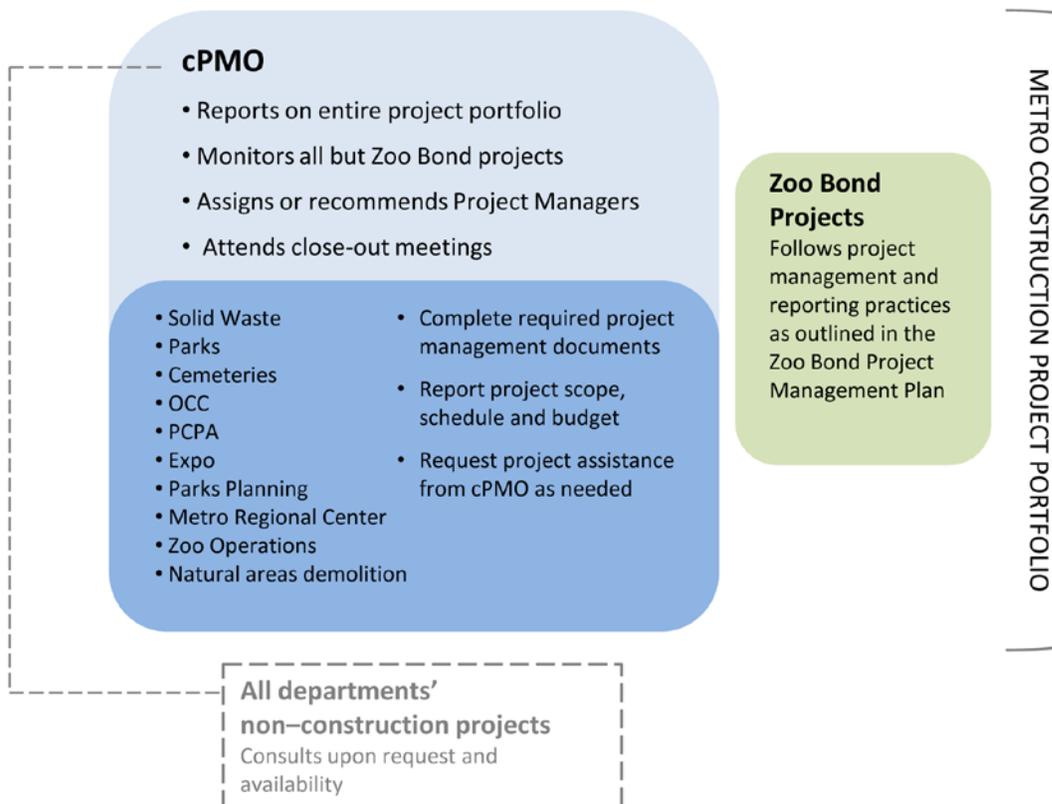


Table 1. Number and Roles of PPMS users for cPMO Projects

Project Managers who would be system super users	13
Project Team members who would enter data	14
Managers / Executives who would view portfolio or project reports but rarely enter data	17

Challenges

The cPMO currently uses minimal software to manage its projects. Metro project managers working on construction projects are responsible for managing budget, scope and schedule for all phases of construction, and often manage consultants and contractors who perform design and construction. Metro project managers *may* use MicroSoft Project, Excel and FastTrack for scheduling. Project and contract cost information, if tracked, is in Excel spreadsheets. An Excel portfolio spreadsheet is used to report status for some projects and is updated manually each month. Some homegrown spreadsheets are quite sophisticated. Contract and cost information from Metro’s financial systems PeopleSoft and EMBS are obtained through PeopleSoft inquiries or reports. There are no utilities to import data from financial systems.

Requirements

For this first PPMS phase, the cPMO seeks to create simple baseline functionality to:

- Maintain a list of projects that can be queried across the portfolio on a common set of attributes
- Track and report project metrics (scope, budget, schedule)
- Produce a high level portfolio dashboard with drill down capability
- Automate required forms
- Point to, or store, all documents related to the project (e.g., as-builts, photos, plans, field visit reports, email, contracts)
- Import data from existing scheduling programs *if* the manager chooses to do so
- Export tasks to Outlook calendars
- Provide internet access to the PPMS

In this first phase, the cPMO does not seek to:

- Maintain budget, cost or schedule data at a granular level
- Import data from financial or time keeping systems
- Provide access to data through mobile applications

Specifically, the cPMO requires the following functionality to support its business processes and portfolio management.

1. Easy data entry of standardized project information through on-line forms. The cPMO requires the following forms: project concept, project management plan, project status report, project change request, and project closeout. These documents are currently created in MS Word. Examples of these documents are included in this request. The cPMO prefers the software be configurable to mimic the content and design of these forms, but is willing to adjust the forms to accommodate system limitations.
2. Contain data fields to enter aggregate budget and spending information. The system can calculate basic cost metrics such as estimate to completion, estimate at completion, and variance.
3. Using data contained in the on-line forms, provide agency-wide or departmental dashboards that show basic project metrics (scope, schedule, and budget). Dashboards could populate from either simple on-line status reports, or eventually, more complex scheduling or resource modules *if the project manager chooses to use these*.
4. Dashboards provide drill-down capability into specific project views. Dashboards must be visual, simple and understandable, and presented in a list-like fashion. Dashboard must include red-yellow-green indicators, and indicators for risks or issues that need management attention. Date data last updated must also be included.
5. Provide ability to configure data process flows. Starting with baseline data fields in the project set-up and the Project Concept Form such as project name, project number and project manager, data pre-populates fields in subsequent forms such as change requests or status reports.
6. Provide electronic approval workflow functionality (e.g., from Director and Sponsor on project concept form or from Steering Committee members on change requests).
7. System maintains an audit log of by whom and when last edit was made.
8. Data masks, lookup fields and integrity controls are robust so that data are entered consistently, and so that required fields are completed.
9. Provide query functionality across projects in the portfolio that includes selection based on like attributes such as type of project, contractor, estimated project cost, project manager, project locations, and Metro department.
10. Ability to interact with other scheduling applications used by Metro. Metro currently uses FastTrack, Excel, Outlook and MS project as scheduling tools.

11. Integration with Outlook calendars. Staff who do not have seats (are not users of) the system could still get notifications.
12. If the software chosen is cloud based, projects can point to or integrate with documents stored inside Metro's firewall.
13. Remote Internet / web access to project data.

V. BUSINESS APPLICATIONS FOR FUTURE ROLL-OUT

Metro is pursuing a strategy to procure a PPMS that meets the initial needs of the cPMO and that could also meet future functionality for other Metro departments. Most importantly, the PPMS would have to provide multi-division capabilities so that different departments could use alternate functionality, or configure the same functionality differently, without compromising core data entry or dashboard reporting across all users. In other words, not all features need to be used by each department for Metro to get some high-level project and portfolio reports. This requirement is essential if Metro is to implement the PPMS in other departments.

Challenges

The significant project management difference between the cPMO and other Metro departments is that the cPMO is managing contractors, whereas other departments may manage and allocate their staff among many internal projects. First and foremost, these departments need sophisticated staffing resource management capabilities, in addition to most of the features required by the cPMO.

Requirements

Specifically, the following functionality would support other departments' projects and portfolios, and enhance project management for all Departments.

14. Provide multi-division capabilities so that different departments could use additional functionality, or configure the same functionality differently without compromising core data entry or dashboard reporting across all users. In other words, not all features need to be used by each department for Metro to get some high-level project and portfolio reports. This requirement is essential if Metro is to implement the PPMS in other Departments.
15. Staff allocation and resource leveling for specific Departmental project portfolios. Essential for Communications, Data Research Center, Information Services, and Planning.
16. Detailed schedule management capabilities.
17. Detailed budget and cost management capabilities.

18. Utilities to import data from financial or timekeeping systems.

VI. RESPONSE CONTENT

The response should contain no more than twenty (20) pages of written material (excluding brochures and case studies which may be included in an appendix), describing the information requested as outlined below. The response should be completed using the form attached as Appendix D. The response should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable material should be included in the response.

A. Tell us why your software is best suited to a government agency like Metro.

B. Ability to meet immediate business application for the cPMO (section IV)

Functionality

1. Describe how your software can effectively match the requirements described and produce the desired outcomes using your core, “out of the box” functionality. Include what specific modules would be configured to meet the requirements.
2. Describe whether your solution is cloud (SaaS) or on-premise. If your company offers both options, describe which deployment you recommend and why.
3. Describe how you would work with Metro staff to install and configure the software to meet the requirements. Please provide an estimated time frame for this work.
4. Describe your training approach to support the cPMO PPMS implementation. Please provide an estimated time frame for training.

Software costs

1. Itemize the first-year costs of the software, including the basis of cost (e.g., per seat, by module, by roles).
2. If you provide both on-premise and cloud-based software, please itemize the cost differential of both.
3. Itemize the costs for the subsequent four-years, including maintenance fees.
4. Itemize any other costs related to the software that Metro should be aware of.

Installation costs

1. Itemize the cost to install and configure the software, and train cPMO staff on its use. Please include reimbursable expenses.
2. Itemize the costs for technical user support for one year.

C. Ability to meet business applications for future rollout (section V)

Functionality

1. Describe how your software can effectively match the requirements described and produce the desired outcomes. Include what specific modules would be configured to meet the requirements.
2. Describe any additional functionality that could benefit Metro.

D. Vendor information and references

1. Please provide at least one, and no more than three, case studies that demonstrate how your firm has applied your software to an agency that had multiple and distinct business lines and which achieved the requirements described for the cPMO (section IV). A case study from a government entity is preferred.
2. Describe the strategic direction of your firm as it relates to your software. For example, is there a specific market segment or technological set of features your firm wishes to advance?
3. Please provide three (3) references for customers that have implemented your software within the past three (3) years.

VII. RESPONSE INSTRUCTIONS

A. Submission of Response

Responses shall be mailed, hand-delivered or emailed to Metro,
Metro Procurement Services
Attention: Julie Hoffman
600 NE Grand Avenue
Portland, OR 97232-2736 julie.hoffman@oregonmetro.gov

B. Deadline

Responses will not be considered if received after the date and time indicated on the RFI cover page.

C. RFI as Basis for Responses

This Request for Information represents the most definitive statement Metro will make concerning the information upon which responses are to be based. Any verbal information which is not addressed in this RFI will not be considered by Metro. All questions relating to this RFI should be addressed to Julie Hoffman (bidsandcontracts@oregonmetro.gov).

D. Non-mandatory pre-submittal conference

Metro will hold a non-mandatory pre-submittal conference on April 18th from 10 to 11:30 am PDT to which vendors may attend remotely. Vendors interested in attending the pre-submittal conference must email Julie Hoffman no later than April 16th to receive remote conferencing information. Attendance is not required but it is strongly recommended. Metro strongly suggests that any questions be submitted to Julie Hoffman by 5pm PDT April 16th. No questions will be considered after 5pm PDT April 19th.

E. Vendor Demonstrations

After review of responses, Metro may select firms to demonstrate their products. These firms will be asked to follow a test script provided by Metro in advance of demonstration. Demonstrations will be held the week of May 20th at a day and time mutually agreeable to the vendor and Metro. Vendors may demonstrate online or onsite at Metro.

F. Procurement Procedure Requirements

Metro in no way implies or guarantees any purchase or procurement of potential solutions submitted in response to this RFI. Metro reserves the right to use the information obtained through this RFI if it is in the best interest of Metro to issue a competitive procurement in the future. Participation in this RFI is voluntary and any expense incurred in providing a response, to include product demonstrations or informational interviews if requested by Metro, shall be the sole responsibility of the vendor.

APPENDIX A : Metro's Technical Environment

- 1) Desktop Environment: Windows 7 / 8
- 2) DB hosting: Microsoft SQL Server
- 3) LDAP Integration: Microsoft Active Directory (capable of supporting Active Directory Service 2012)
- 4) E-mail integration: Microsoft Exchange/Outlook (capable of supporting Exchange 2013 / Outlook 2013)
- 5) Browser: Microsoft Internet Explorer (capable of supporting IE 10)
- 6) Web document storage: Microsoft SharePoint
- 7) Financial systems: PeopleSoft, EBMS (Ungerboeck Software)
- 8) Timekeeping: Kronos
- 9) Budget: Questica

APPENDIX B: Metro Organization Chart (attachment)

APPENDIX C: cPMO Required Forms (attachment)

APPENDIX D: Metro Response Form (attachment)