Program Management Consulting Support RFP -13-007-O

Pre-Proposal Conference

Friday, November 2, 2012

9:00 a.m.

STATE PROCUREMENT OFFICE
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AGENDA

Presenters: Bonnie Kahakui, State Procurement Office (SPO)
James Lum, Office of Information Technology (OIMT)

- Introduction
- Background & History
- Overview / Scope of Work
- Proposal Submittal in HePS
- Overview of Evaluation Criteria
- Overview of the RFP Process
- Significant Dates
- Hawaii Electronic System (HePS)
- HCE Registration
- Information For Vendors
- Q & A

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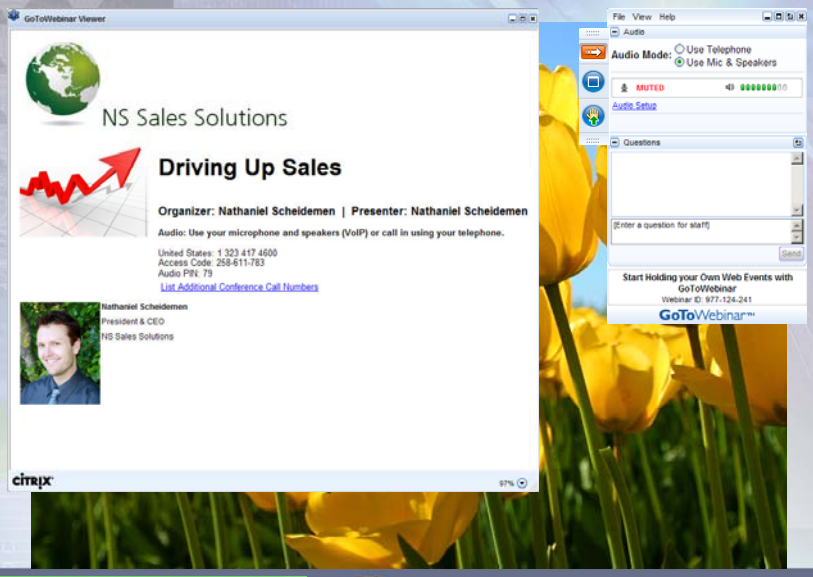
The GoToWebinar Attendee View



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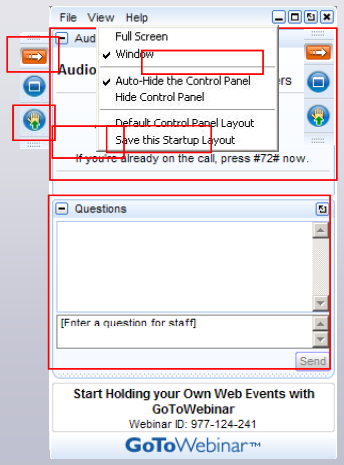
How to Participate Today



- Open and close your Panel
- View, Select, and Test your audio
- Submit text questions
- Raise your hand
- Q&A addressed at the end of today's session

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Introduction

- State Procurement Office (SPO) on behalf of Office of Information Management Technology (OIMT) conducting procurement.
- All questions/inquiries to be submitted through the Hawaii Electronic Procurement System (HePS).

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Background & History

- March 2009, the Auditor of the State of Hawaii released report 09-06 entitled "Audit of the State of Hawai'i's Information Technology: Who's in Charge?" which identified numerous shortcomings in the way the State managed its information technology.
- Act 200 in 2010, amended by Act 84 in 2011, establishing the position of State Chief Information Officer (CIO) to oversee the State's IT policies and investments.
- July 6, 2011 the Office of Information Management and Technology (OIMT) was established to provide the support to the CIO in developing the statewide Information Technology (IT) Strategic Plan with Sanjeev "Sonny" Bhagowalia appointed as the CIO .
- The Plan, delivered to the Governor in September 2012, presents an 11-year phased approach to reengineering the State's business processes and consolidating all of the State's Information Technology (IT) and Information Resource Management (IRM).

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Overview

The resulting contract will enable the State of Hawaii to achieve the following objectives:

- Effectively identify, prioritize and close performance gaps though process improvement, information management, and technology solutions;
- Ensure that the best practical and cost-effective technology is applied to meet the State's current and future information needs;
- Maximize performance while minimizing redundancies and costs;
- Improve quality of the IT Portfolio and ensure alignment (line of sight) of the IT/IRM investments to strategic goals;
- Provide comprehensive and transparent IT/IRM services to the State's Departments and Attached Agencies throughout the investment lifecycle; and
- Ensure uninterrupted mission delivery to the citizens.

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Scope of Work

- The purpose of the RFP is to enter into a contract with a qualified firm to provide a variety of consulting services pertaining to the maturation and implementation of the State's Business and IT/IRM Transformation Strategic Plan.
- The CIO and OIMT will be in the early stages of implementing the Business and IT/IRM Transformation Strategic Plan, and will need support at all levels and across the entire lifecycle of business and IT transformation. OIMT envisions a contract for support services.

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TASK AREAS

1. Strategic Planning
2. Governance
3. Subject Matter Expertise
4. Policy
5. Performance Management
6. Portfolio Management
7. Enterprise, Segment, and Solution Architecture
8. Business Process Analysis and Reengineering
9. Budget and Financial Planning
10. Business Case Analysis
11. Risk Management
12. Program and Project Management Office (PMO) Support
13. Acquisition and Strategic Sourcing Support
14. Organizational Development and Human Capital Management
15. Organizational Change Management
16. Communications and Marketing
17. Open Government
18. Quality Assurance
19. Training
20. Facilitation
21. Operations and Service Level Management
22. Application Development
23. Information Assurance & Privacy
24. Administrative Support

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Approach

- These are the areas of services that may be required over the life of the contract. Specific work assignments will be established on a Task Order basis, as noted in Section 2.2 B of this RFP. OIMT reserves the right to adjust hours post award when it is deemed critical to the completion and delivery of a task, or when the scope must be modified to meet business needs.
- Respondents to the proposal shall explain the general approach and/or methodology they will apply in each of the task areas, absent any specific tasking, timelines, or deliverables. The approaches proposed by the Offeror may or may not be adopted by OIMT upon award, but the proposed approaches will be evaluated and used as the basis for scoring in the Technical and Management Approach section of the evaluation methodology, as described in Section 4.
- The Two (2) Task orders included in this RFP will be the basis for Offeror's staffing and pricing proposals. Task Order One is a labor hour task order for support of the OIMT office, and will be funded from the Office's General Funds; Task Order Two is also on a labor hour basis, for support of the Enterprise Resource Planning (ERP) program, and will be funded with Capital Improvement Project (CIP) Funds specifically designated for the ERP program.

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Task Order 1

OIMT Program Management Support

- The purpose of the first Task Order is to provide support to OIMT in the operations of the Office, including planning and execution of the projects that will continue to implement the *Business and IT/IRM Transformation Plan*
- **Note**: OIMT estimates between 8,000 - 10,000 hours for this Task Order. The total funding available for this Task Order is $1,220,000, including HIT $425,000 and GIS $25,000 subject matter experts.

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Task Order 1 (continued)

The minimum personnel required:

- Program Manager (PgM)
- Project Manager (PM)
- Health Policy Analyst
- Health Business Analyst
- GIS SME – A Subject Matter Expert in Geospatial Information Systems (GIS)

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Task Order 2

ERP Planning and Management Support

- Provide support to OIMT in the planning, acquisition, and deployment of the State's investment in an Enterprise Resource Planning (ERP) solution.
- The ERP will become the trusted source for transactions and data validation.
- Focus on preparing the State of Hawaii for ERP in terms of policy, process, people and technology.

Note: OIMT estimates between 18,000 - 20,000 hours for this Task Order. The total funding available for this Task Order is $2,725,000.

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Task Order 2 (continued)

The minimum personnel required:

- Program Manager (ERP Support)
- Strategic ERP
- ERP Acquisition Process Consultant
- ERP Organizational Development and Human Capital Management Consultant (ERPOD/HCM
- ERP Communications and Change Management

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Proposal Submittal

- **Offerors shall input $1.00 as the *Unit Price in US Dollars and Cents* when submitting their offer in HePS.**
- Proposals shall be submitted as attachments on HePS.
- Include the RFP number and offeror name in the file name.
  - Transmittal Letter & Offer Form 1
    - Ink signatures are not required for electronic submission of offer on HePS but shall be required upon Notice of Award
  - Corporate Experience & Capabilities
  - Project Approach
  - Project Organization & Staffing
  - Pricing Sheets
    - Offer Form 2 , Tasks 1 & 2
    - Attachment 3, Qualifications & Cost Summary

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Proposal Submittal (continued)

- Proprietary information shall be contained in a separate file that is clearly identified and propriety/confidential.
- Files should be in PDF format and compatible with Adobe reader version 9. or greater.
- Large files should be split into volumes.

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Overview Of Evaluation Criteria

- The Evaluation Committee consists of at least three (3) governmental employees.
- Evaluation criteria based on the associated points outlined in the RFP, with a maximum of 200 points.
  - STAFFING 60
  - PAST PERFORMANCE 60
  - TECHNICAL & MANAGERIAL APPROACH 60
  - COST 20

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Overview of Evaluation Criteria (continued)

- Rating and Determination of Priority Listed Offerors
- Discussion with Priority-Listed Offerors
- Best and Final Offers
- Selection and Award
  1) Staffing
  2) Past Performance
  3) Technical & Managerial Approach/Methodology
  4) Cost (lowest cost = highest points)

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Overview of RFP Process

- Issuance of RFP. All changes to be made through addenda.
- All questions, responses to questions and proposals shall be received on HePS.
- Evaluation based on the evaluation criteria set forth in the RFP. Review conducted by committee of at least three government employees.
- If discussions are necessary, a priority-list shall be generated consisting of acceptable or potentially acceptable proposals.

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OVERVIEW OF RFP Process (continued)

- Addenda shall be issued inviting priority-listed offerors to submit BAFO.
- BAFO shall be scored on criteria set forth in the RFP.
- Award shall be made to the Offeror whose proposal is scored the highest.

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Significant Dates*

Release of Request for Proposals	Oct 25, 2012
Pre-proposal Conference	Nov 2, 2012 9:00 to 11:00 a.m. (HST)
Due date/time to Submit Questions	Nov 7, 2012
State's Response to Questions	Nov 15, 2012
Proposals Due date/time	Nov 30, 2012
Proposal Evaluations	Dec 3-14, 2012
Priority Listed Offer Discussion (Optional)	To Be Determined
Best and Final Offer (Optional)	To Be Determined
Notice of Award	To Be Determined
Anticipated Start Date	Feb 1, 2013

*Any change of dates will be done via Addenda

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Hawaii Electronic Procurement System (HePS)

Where and How to Register

- http://hawaii.gov/spo
- HePS
- HePS for Vendors, Contractors and Service Providers
  - Vendor Registration
  - Registration Instructions (info needed to register)
  - HePS Quick Reference for Vendors (how-to)
  - General Instructions (things you should know)
  - FAQ- Frequently asked questions

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HePS

The Vendor Commodity Code Profile

(NIGP Commodity Code Profile)

- **Primary purpose**: Convenience for vendors
  - Email notifications sent
  - Vendor can look at a filtered list of solicitations instead of all solicitations.
- Not having the commodity code in your profile does NOT prevent a vendor from responding.
  - Just log in and follow instructions for selecting all solicitations (Quick Reference for Vendors).
- Commodity code for this solicitation – 91875, 91829, 91858, 95823

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HePS Fees

- Register in HePS – no fee
- Submit an offer (proposal) – no fee
- Awarded –
  - Fee of .85% (.0085) of the award
  - Cap per award of $5,000
- Paid to HePS application provider, SicommNet (Not to the State)

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HePS Hints

- You may change your response in HePS as many times as you like before submittal due date and time.
  - Delete old; enter new; Verify! (make sure you get a pop-up when you submit; log in again to make sure everything is correct (attachments, etc.) you should also get an email.
- If your files are large, break them into smaller files.
- Do not wait until the last minute to submit! Once submittal deadline has passed, you will not be able to enter or change anything. The **submit** button must be pressed to be considered.
- If you have not pressed the **submit** button before 59 seconds of the submittal deadline you will not be able to submit.
- Note the instructions for entering pricing in HePS are unique to this solicitation. If you respond to other solicitations on HePS you will be expected to enter pricing differently.
- Need help/practice with the mechanics of submitting an offer?
  - SicommNet Vendor Liaison: Michael Matsumoto mmatsumoto@sicomm.net or 808-371-4274 (Michael is in Hawaii)
- Questions specific to the solicitation or on policy regarding HePS
  - HePS buyer for this solicitation, Bonnie Kahakui.

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Hawaii Compliance Express (HCE)

- HCE is utilized to verify vendor compliance with Hawaii laws to conduct business in the State of Hawaii.
- It is HIGHLY recommended to register as soon as possible. Registration is $12.00 and can easily be completed at https://vendors.ehawaii.gov.
- Award will not be made to a non-compliant Offeror.

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More Information for Vendors

- General information for vendors may be obtained at: http://hawaii.gov/spo. Click on *Doing Business With the State.*
- Copy of today's power point is available at: http://hawaii.gov/spo/training/informational-sessions-for-vendors-contractors-and-service-providers. Select **Pre-Proposal Conference - RFP-13-007-O, Program Management Consulting Support**
- All questions shall be submitted through HePS.

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Questions?

Mahalo

THANK YOU

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