

EVALUATION OF RFP FOR PROJECT MANAGEMENT SOFTWARE

Prepared for CLIENT

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1. Executive Summary

Info-Tech has reviewed the draft document titled "Specifications for Request for Proposal for Project Management System.

We have reviewed the RFP from a number of viewpoints, and suggest some significant changes. The following are the major observations and recommendations:

- The RFP process can be time consuming for both CLIENT and for potential bidders. The amount of information requested from vendors is, in our view excessive, and will reduce the number of potential bidders and complicate the evaluation for CLIENT. We suggest a number of simplifications for the RFP.
- The RFP process described implies that the selection of a vendor will be made solely on the basis of the written sealed proposals. While the responses can be used to short-list the two or three leading contenders, we suggest that a structured walkthrough (test-drive) of typical scenarios be used to select the most appropriate solution. The RFP should describe this requirement and request that bidders suggest how they will carry this out (likely remotely).
- The functional requirements described in the document are general and will not readily discriminate between simple and very complex software solutions. And the potential size of purchase is undefined. We recommend that the RFP be clearer about how the PM software will be used and how many licenses are likely to be purchased. Areas needing more detail include the relative importance of managing a portfolio of projects with the same resources versus management of individual projects, the number of tasks to be planned and tracked in a large project, the number of distinct groups working on and managing subcomponents of a project and the requirement for individuals to enter and change information. Bidders can then suggest solutions that are truly appropriate for the purpose and not overly complex (and expensive).

(Note that the cover page in the document you provided refers to PEER, not CLIENT.)

2. Simplifying the RFP

There are a number of sections in the RFP that generate additional work for the vendor and can be restructured to simplify the selection process. We suggest that the following sections be modified in the RFP:

- Core System Requirements: Some of the requirements are described very broadly (for example, "tools for creating ad hoc reports"). Rather than insisting on a detailed description of how the application handles various areas of core functionality, give bidders the option to answer each point by cross reference to their submitted documentation (e.g. 1.1.1 = section 23.5 of the Technical Specification document).
- Hardware and Software: We suggest that you be specific as to which platforms you are prepared to consider (e.g. Windows Server, SQL) rather than having to reject proposals that don't fit your environment. Your section on network standards has this level of specificity.

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- Application Customization and Development: It's unlikely that source code will be available for many of the options. Be clear about what type of changes you are really considering, so that the bidders can give you a clear answer. Otherwise, assessing and scoring responses to this set of questions will be very difficult.
- System Availability: Project Management systems tend not to have high availability targets. Before including the request, consider how and whether you will include this factor in your assessment.
- Technical Capability: This section is worded ambiguously. If you are concerned about the ability of the vendor to support the software in Newfoundland, or about their commitment to continue new development, or the frequency of patches required, ask those specific questions. If you have a minimum expectation, include that as a minimum requirement statement.
- Training: This section could be simplified by asking for a copy of the training brochure.
- Security: As in the case of hardware and software, a description of your current security policies and environment will simplify your assessment of the bidder responses.
- Maintenance and Support: Eliminate the references to hardware in this section. Clarify what your application support requirements or expectations are (bug fixes, re-configuration, and service restoration assistance as a result of a CLIENT problem).
- Delivery and Installation: You should be specific as to whether you are prepared to install and configure the software yourselves with remote support (a cheaper option).
- Implementation: Do you have a specific implementation in mind or are you looking for a generic plan?
- Cost of Equipment: Remove the references to hardware and equipment, as well as the multiple manufacturer reference.
- Terms and Conditions: remove reference to C.S.A. and Regulated medical Devices.

3. Rightsizing the Solution

Project Management software covers a wide range of possible solutions, from the cheap (or free) and simple to the large, complex and expensive. Each of these can address the majority of the requirements you have described. **It is important, therefore, to provide possible respondents with guidelines as to the nature of the projects that will be managed using the PM software and the size of the project teams.** Otherwise, some of the proposals may be inappropriate because they address either simpler or much more complex situations.

4. Suggestions on the Proposed Selection Process

The procurement process in public sector organizations must conform to policies intended to support objectivity and transparency. However, the selection process outlined in this RFP presents several challenges or opportunities that should be addressed, if possible.

The implication in the RFP is that the PM software is intended specifically for the eleven members of the APPS division. Unless the proposed licensing agreement will support a much broader population (there is no specific mention of other likely licensees, a number of

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potential vendors may choose to no-bid, due to the low financial opportunity. **Clarify the number of proposed licensed users.** If the number is indeed less than twenty, don't expect the bidders to have put in much custom work into the responses.

If PEER has completed the selection of similar software, **CLIENT might consider leveraging the analysis conducted by PEER.**

The RFP makes no provision for the potential bidders to ask questions or to provide a structured walkthrough. We consider the structured walkthrough to be an essential component of application software evaluation.

System Cost is identified as 16% of the evaluation weight. **We would suggest, if possible, that you not lock yourselves into a fixed weight for price, but rather remove it as a component of the 100%.** You could say that a contract will be awarded to the proposal with the lowest price that adequately meets the functionality, implementation, etc. criteria.