SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 **OPEN DATE: 07/27/2016**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: One Time Purchase

AGENCY: Information Technologies Division

BASIS OF AWARD: To the Highest Scoring Bidder Based On The Evaluation Criteria

NUMBER OF BIDS INVITED: (12) NUMBER RECEIVED: (4) OTHER: (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Approval was granted on 8/14/2016 for interviews/demonstrations of the two top scoring vendors: Change Point, dba Daptiv Solutions, LLC., and Rego Consulting Corporation. The sub-committee has completed the evaluation of the demonstrations and the averaged scoring of the bid response evaluation and the evaluation of the interview/demo for both vendors is listed below:

- Change Point dba Daptiv Solutions, LLC. 89.33
- Rego Consulting Corporation 79.06

Accordingly, recommend approval of award to the highest scoring vendor, Change Point dba Daptiv Solutions, LLC.. The total expenditure not-to-exceed $109,740.00.

Funding to be encumbered from account AFIT531CSCS-06431 to be issued by purchase order.

ATTACHMENTS: Recommendation Memo; Tabulation; Evaluation Matrix; Scoring Sheet; Previous Award

ANALYST: _____ CHELSEY RENFROE

RESPECTFULLY SUBMITTED _____
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: **Kenneth Lathrop, Chief Information Officer, Information Technologies Division**

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

INFORMATION TECHNOLOGIES DIVISION

Jacksonville
Where Florida Begins.

09/29/16 09:07:51
COJ - Procurement Division

September 29, 2016

TO: Greg Pease, Chief of Procurement
Procurement Division

FROM: Michael Turner, PMO Manager Michael Turner
Information Technologies Division

THRU: Kenneth Lathrop, Chief of Information Technologies/CIO Kenneth E. Lathrop
JSP 9/29/16

SUBJECT: **Request for Award for ESC-0516-16 Project Portfolio Management Solution**

On Jul 27, 2016 the City of Jacksonville's Procurement Division received four valid bid responses for ESC-0516-16 for the Project Portfolio Management Solution. The bid tabulations were conducted and the Information Technologies Division requested to move forward with interviews/demos of the top two scoring vendors. The interviews/demos have been completed and scores have been tabulated.

The Information Technologies Division requests approval to move forward with Award of ESC-0516-16 to Changepoint based on the results of the averaged scores of the bid evaluations and vendor interview/demos.

Bid Evaluation and Demo Scores:

Vendor	BID Evaluation Score	Interview/Demo Score	Combined Score	Averaged Final Score
Changepoint	95.35	83.3	178.65	89.33
Rego Consulting	84.32	73.8	158.12	79.06

Award Amount Not-to-Exceed: $109,740
Funding Source: AFIT531CSCS 06431

Your favorable consideration of this request is appreciated.

CC: John Proctor, ITD Finance Manager
Kevin Johnson, Project Manager

SCORE SHEET

TITLE: Project & Portfolio Management Solution BID NO: ESC-0516-16 OPEN DATE: JULY 27, 2016 @ 2:00 PM BUYER: Chelsey Renfroe, ANALYST No. Invited: (12) No. Received: (4) No Bids: (1) Recorded By: Gail Sampson		CHANGE POINT	REGO CONSULTING CORP.
DESCRIPTION	POINTS		
BID RESPONSE EVALUATION SCORE	100	95.35	84.32
INTERVIEW / DEMO SCORE	100	83.3	73.8
AVERAGED SCORE:		89.33	79.06
Minimum Requirements:		Yes	Yes
Conflict of Interest:		Yes	Yes
Addendums (1 - 2):		Yes	Yes

#	Area	REGO	ChangePoint
	Company Background and Market Viability		
1	Discuss the track record of providing IT products, Project and Portfolio Management Solutions, and SaaS solutions.		
2	Provide the future growth roadmap and how the company is working to meet those goals.		
	20 Maximum Points	15.6	18
	Demonstrate Solution Core Functionality		
3	Portfolio Management		
4	Project Management		
5	Resource Management		
6	Demand Management/Project Intake		
7	Issue/Risk/Change Management		
8	Application and Infrastructure Portfolio Management		
9	Time Management		
10	Team Collaboration and Document Management		
11	Financial Management/Budget		
	45 Maximum Points	33	37.4
	Demonstrate and Discuss Technical Features and Services		
12	Integration		
13	Administration and Sign-On		
14	Dashboards and Reporting		
15	Configuration and Flexibility		
16	Services and Support		
17	Technology		
18	Present/Discuss the Implementation Process		
19	Implementation process, approach, and methodology. Include examples.		
	35 Maximum Points	25.2	27.9
	Total	73.8	83.3

Project and Portfolio Management

Prepared:

Evaluation Criteria

	Weight	Max Score	Changepoint Score	Changepoint Score %	Changepoint Total Weighted Score	Rego / CA Score	Rego / CA Score %	Rego / CA Total Weighted Score	UMT360 Score	UMT360 Score %	UMT360 Total Weighted Score	Workfront Score	Workfront Score %	Workfront Total Weighted Score
VENDOR SCORING SUMMARY														
Cost	40%			100.00%	40.00		74.00%	29.60		27.00%	10.80		73.00%	29.20
Functional and Technical Requirements	35%	867	863	99.54%	34.84	863	99.54%	34.84	816	94.12%	32.94	849	97.92%	34.27
1 Portfolio Management		40	40	100.00%		40	100.00%		40	100.00%		40	100.00%	
2 Project Management		125	125	100.00%		125	100.00%		120	96.00%		120	96.00%	
3 Resource Management		80	80	100.00%		80	100.00%		80	100.00%		80	100.00%	
4 Demand Management/Project Intake		79	75	94.94%		79	100.00%		79	100.00%		79	100.00%	
5 Issue/Risk/Change Management		74	74	100.00%		74	100.00%		74	100.00%		74	100.00%	
6 Application and Infrastructure Portfolio Management		38	38	100.00%		38	100.00%		16	42.11%		38	100.00%	
7 Time Management		56	56	100.00%		56	100.00%		56	100.00%		56	100.00%	
8 Team Collaboration and Document Management		60	60	100.00%		60	100.00%		60	100.00%		60	100.00%	
9 Financial Management/Budget		64	64	100.00%		64	100.00%		48	75.00%		58	90.63%	
10 Integration		51	51	100.00%		51	100.00%		47	92.16%		44	86.27%	
11 Administration and Sign-On		36	36	100.00%		32	88.89%		36	100.00%		36	100.00%	
12 Dashboards and Reporting		64	64	100.00%		64	100.00%		64	100.00%		64	100.00%	
13 Configuration and Flexibility		28	28	100.00%		28	100.00%		28	100.00%		28	100.00%	
14 Services & Support		44	44	100.00%		44	100.00%		40	90.91%		44	100.00%	
15 Technology		28	28	100.00%		28	100.00%		28	100.00%		28	100.00%	
Functional and Technical Detailed Responses	15%	495	479	96.77%	14.52	458	92.57%	13.88	408	82.38%	12.36	476	96.20%	14.43
1 Portfolio Management		12	11	95.00%		11	91.67%		11	95.00%		12	96.67%	
2 Project Management		27	25	91.85%		24	87.41%		21	77.78%		25	91.11%	
3 Resource Management		15	15	97.33%		12	78.67%		14	94.67%		15	97.33%	
4 Demand Management/Project Intake		39	36	92.31%		33	83.59%		36	92.31%		37	94.87%	
5 Issue/Risk/Change Management		12	11	95.00%		10	81.67%		9	75.00%		12	96.67%	
6 Application and Infrastructure Portfolio Management		60	57	95.67%		55	91.67%		40	66.67%		56	92.67%	
7 Time Management		36	34	93.33%		34	95.00%		33	91.11%		34	95.00%	
8 Team Collaboration and Document Management		33	31	93.94%		30	90.91%		27	83.03%		31	94.55%	
9 Financial Management/Budget		15	15	98.67%		14	92.00%		15	97.33%		15	100.00%	
10 Integration		48	47	98.75%		46	96.25%		33	69.17%		45	94.58%	
11 Administration and Sign-On		45	45	99.11%		42	92.44%		40	88.00%		44	97.33%	
12 Dashboards and Reporting		18	18	100.00%		18	98.89%		18	97.78%		18	98.89%	
13 Configuration and Flexibility		12	12	100.00%		12	98.33%		12	98.33%		12	100.00%	
14 Services & Support		36	36	100.00%		34	95.56%		23	64.44%		35	97.22%	
15 Technology		87	86	98.85%		85	97.24%		76	87.36%		87	99.77%	
References	10%	10	6	60.00%	6.00	6	60.00%	6.00	4	40.00%	4.00	3	30.00%	3.00
Total Average Weight/Score & Total	100%	1372	1348	98.25%	95.35	1327	96.73%	84.32	1228	89.49%	60.10	1328	96.81%	80.90

ATTACHMENT E
EVALUATION MATRIX

The evaluations will be based upon the following criteria, and Proposers are requested to provide, as a minimum, the information listed under each criterion. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the proposal as non-responsive. The response to each of the criterion will be evaluated relative to the other responses received and will be awarded a score based on the criteria listed. Proposers are encouraged to arrange their responses in a format that will offer ready review and evaluation of each criterion. Please note that 100 points is the maximum total for all categories combined. The top two (2) scoring proposers will be invited onsite for an interview/demo of their proposed system.

Criteria	Description of Criteria	Maximum Points Available
Cost	**The overall cost of each bid shall be calculated by adding the Total Cost to Implement at Year One to Years 2 and 3 of Recurring Annual Hosting/ Subscription and Recurring Annual Service/Support. The proposer submitting the lowest cost to the City shall receive the maximum number of points for cost, 40 points. Each sub-sequentially higher cost shall be divided into the lowest cost received and the products score % will be multiplied by the maximum points available to render the points.** *Score = ((Lowest Bid)Next Low Bid) X 40*	40
Functional and Technical Requirements Response	**All items listed on the Functional and Technical Requirements Response Form will be evaluated and scored based on the vendor response and how the product is able to meet the requirements.** *Maximum of thirty five (35) points*	35
Functional and Technical Detailed Response	**All items listed on the Functional and Technical Detailed Response form will be evaluated and scored based on the vendor response and how the product is able to meet the requirements.** *Maximum of fifteen (15) points*	15
References	**Proposer submitted five (5) customer references where the proposer has successfully provided two (2) consecutive years of experience providing Project Portfolio Management Software as a SaaS solution.** **References should contain the following:** **Point of Contact** **Phone Number** **Address** **Email Address** **Description of Services** *Verified references will be awarded two (2) points each for a maximum of 10 points.*	10
Maximum Available Score		**100**

ATTACHMENT B

FUNCTIONAL AND TECHNICAL REQUIREMENTS

Proposer must provide a complete response: Place the appropriate letter designation in the "Response" column according to the descriptions below and provide additional comments if the response is B. or C. Each response category has been prioritized as either Required or Desired. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the proposal as non-responsive.

A. **Standard Function in Current Release.** The software provides the requested functionality without screen, code, or design changes. The product can satisfy the specification without any modification to the standard baseline software offering. The software may offer user defined configuration utilizing supplied configuration options.

B. **Designed in Future Release.** A future release of the software will provide the requested functionality without screen, code, or design changes. Include scheduled release date in the comment section.

C. **Customer Development Required.** The desired feature or functionality is not available as part of the standard software functionality, but can be custom-built outside of the delivered SaaS solution to satisfy the specified system requirement.

D. **Does Not Meet Requirement.**

Required Response Scoring
A. Standard Function in Current Release. = 4 points
B. Designed in Future Release. = 2 points
C. Customer Development Required. = 1 point
D. Does Not Meet Requirement. = 0 points

Desired Response Scoring
A. Standard Function in Current Release. = 3 points
B. Designed in Future Release. = 2 points
C. Customer Development Required. = 1 point
D. Does Not Meet Requirement. = 0 points

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SECTION 4

GENERAL INFORMATION AND SCHEDULE
PROJECT PORTFOLIO MANAGEMENT SOLUTION

Scope of Services

The City of Jacksonville Information Technologies Division (ITD) is requesting proposals to fulfill a Project and Portfolio Management Software as a Service (SaaS) Solution to reengineer business processes and deliver transparent insight into the IT business portfolio. The proposed solution should empower leadership with the tools necessary to provide strategic alignment, effective team collaboration, and improved decision making thus contributing to organizational effectiveness. ITD currently has approximately 116 employees in various positions that may or may not utilize the solution. The solution may be expanded to other departments within the City of Jacksonville in the future.

Award

The City of Jacksonville will evaluate the proposals for Project and Portfolio Management Solution. The top two (2) scoring evaluated proposals will be invited to interview/demo of their proposed system. The interview/demo will be evaluated and combined with the RFP evaluation score. The final evaluated score will be the average of the evaluated bid response and interview/demo scores. The highest scoring contractor will be awarded the implementation of the Project Portfolio Management Solution as SaaS for one (1) year, with two (2) one (1) year renewal options.

RFP Schedule

Activity	Date
RFP Published	July 13, 2016
Optional Pre-Bid Meeting	July 20, 2016 at 11:00A.M.
Questions Deadline	July 18, 2016 by 10:00A.M.
Proposal Deadline	July 27, 2016 by 2:00P.M.
Demos/ Interviews (Top Two Proposers)	TBD
Estimated Contract Award	TBD

(Remainder of page intentionally left blank)

ATTACHMENT F

INTERVIEW/DEMONSTRATION EVALUATION CRITERIA

NOTE: Proposers will be allowed one (1) hour of set up time and two (2) hours of presentation time.

#	Area	Score
	Company Background and Market Viability	
1	**Discuss the track record of providing IT products, Project and Portfolio Management Solutions, and SaaS solutions.**	
2	**Provide the future growth roadmap and how the company is working to meet those goals.**	
	20 Maximum Points	
	Demonstrate Solution Core Functionality	
3	**Portfolio Management**	
4	**Project Management**	
5	**Resource Management**	
6	**Demand Management/Project Intake**	
7	**Issue/Risk/Change Management**	
8	**Application and Infrastructure Portfolio Management**	
9	**Time Management**	
10	**Team Collaboration and Document Management**	
11	**Financial Management/Budget**	
	45 Maximum Points	
	Demonstrate and Discuss Technical Features and Services	
12	**Integration**	
13	**Administration and Sign-On**	
14	**Dashboards and Reporting**	
15	**Configuration and Flexibility**	
16	**Services and Support**	
17	**Technology**	
18	**Present/Discuss the Implementation Process**	
19	**Implementation process, approach, and methodology. Include examples.**	
	35 Maximum Points	

Total Score (out of 100) [ ]

SUBJECT: Project & Portfolio Management Solution (CSPEC)

BID #: ESC-0516-16 **OPEN DATE:** 07/27/2016

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: One Time Purchase

AGENCY: Information Technologies Division

BASIS OF AWARD: To the Highest Scoring Bidder Based On The Evaluation Criteria

NUMBER OF BIDS INVITED: (12) NUMBER RECEIVED: (4) OTHER: (1)

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
On July 27, 2016, the City of Jacksonville, Procurement Division received four (4) valid bid responses for subject bid and the Evaluation Committee has completed the review and ranked as follows:

- Change Point 95.35
- Rego Consulting Corporation 84.32
- Workfront 80.90
- UMT360 60.10

Recommend approval to move forward with the interview/demo of the top two (2) highest scoring bidders based on the evaluation criteria.

ATTACHMENTS: Recommendation Memo; Tabulation; Evaluation Matrix; Scoring Sheet

BUYER: KATHY NASWORTHY

RESPECTFULLY SUBMITTED GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief Information Officer, Information Technologies Division

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING — DATE: 8/11/2016

OTHER:

ACTION OF AWARDING AUTHORITY DATE 8/16/16

APPROVED ✓ DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Sam E. Mousa
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of:
Executive Order No. 2015-05

QWS3270X 9/29/2016 2:12 PM
FAML6350 V5.1 ** NW COJ FAMIS PRODUCTION ** 09/29/2016
LINK TO: ACCOUNT SUMMARY INQUIRY 2:12 PM

FISCAL MO/YEAR : 12 2016 CURRENCY CODE :
INDEX CODE : AFIT531CSCS INFORMATION TECHNOLOGIES
SUBOBJECT : 06431 SOFTWARE DEVELOPMENT OVER $30,000
PROJECT :
PROJECT DETAIL :
GRANT :
GRANT DETAIL :
USER CODE :

S	SEPT 2016	ANNUAL BALANCE	ALL YEARS BALANCE
ESTIMATED REVENUES	.00	.00	.00
REVENUES	.00	.00	.00
UNREALIZED REVENUES	.00	.00	.00
BUDGET	149,308.00	149,308.00	149,308.00
EXPENDITURES	.00	.00	.00
ENCUMBRANCES	.00	.00	.00
PRE-ENCUMBRANCES	149,308.00	149,308.00	149,308.00
REMAINING BALANCE	.00	.00	.00

F1-HELP F2-SELECT F4-PRIOR F5-NEXT
F9-LINK F10-PRIOR-MO F11-NEXT-MO

G014 - RECORD FOUND