

Background for the RMA CONSULTING GROUP, INC Purchase Order

In an effort to better identify and plan for the Energy Commission's IT needs, ITSB is implementing an IT Governance Policy that involves having our IT Project Managers meet with each Division's management to gather information about their IT-related projects and priorities. From that, along with IT activities driven by ITSB such as network maintenance, we have started developing a Master Project Plan. This tool will give us a more centralized way to plan the overall timing of all IT activities, with the ultimate goal of assigning and load-balancing resources (i.e., people).

To assist us with this new effort, we are requesting the approval of Purchase Order 11-409.00-011 for \$98,000 to provide expertise and guidance in the further development and use of a Master Project Plan.

California Energy Commission
AGENDA INPUT FORM (GENERAL)

CEC 36 (Rev. 3-91)

Please print or type



DUE DATES: A listing of Commission Business Meetings and Contracts Office due dates are available from the Secretariat.

CONTACT PERSON: Steve Bonta

PHONE NUMBER: 653-3873

MS: 7

Date due to Contracts Office: N/A (ITSB P.O.)

Date due to Secretariat: February 17, 2012

Proposed Business Meeting Date: March 14, 2012

AGENDA ITEM SUBJECT AND DESCRIPTION – (This is the description that will appear on the agenda)
 RMA Consulting Group, Inc. – Possible approval of Purchase Order 11-409.00-011 for \$98,000 to provide expertise and guidance in the development and use of a Master Project Plan to help the Information Technology Services Branch identify and plan its resources in support of the Energy Commission's Information Technology projects and activities. (Funding: ERPA) Contact: Steve Bonta

CONSENT DISCUSSION

Time needed for presentation: 10 Minutes

CHECK HERE IF YOU NEED A COPY OF YOUR SIGNED RESOLUTION/ORDER

SPECIFY AUDIO-VISUAL EQUIPMENT NEEDED FOR PRESENTATION

DEPUTY DIVISION DIRECTOR SIGNATURE

Date:

REQUEST FOR OFFER (RFO)
11-409.00-011

Master Project Plan Development

Date: February 7, 2012

You are invited to respond to this California Multiple Award Schedule (CMAS) Request for Offer (RFO) to provide contracting services that will provide expertise and guidance in the further development and use of a Master Project Plan (MPP) for the Project Management Office (PMO). The services required are described in the following Scope of Work (SOW). By submitting an offer, your firm agrees to the terms and conditions stated in the CMAS contract used to submit the offer as well as those stated in this RFO. Selection will be based on best value using the criteria listed in this document.

Please read this document carefully. All questions must be submitted via BidSync. Answers will be posted directly to the questions on BidSync. The RFO response including supporting documents, if any, as well as one (1) copy of the complete CMAS contract including the associated price list is due **at noon, Thursday, February 16, 2012**. Offer may be submitted electronically as long as it is smaller than 5 MB by the due date (and time) to Lhoffman@energy.state.ca.us. If the response is mailed (including but not limited to U. S. Postal Service or overnight services) or hand delivered it must include one original and three copies as well as one (1) copy of the complete CMAS contract including the associated price list and be received by **noon, Thursday, February 16, 2012**. Any questions regarding this RFO should be directed to Ms. Hoffman.

Linda Hoffman
1516 9th Street, MS-7
Sacramento, CA 95814-5512
(916) 651-6179
Lhoffman@energy.state.ca.us

Table 1 provides the Key Dates concerning activities related to this RFO.

Table 1: Key RFO Dates

Release of RFO	Tuesday, February 7, 2012
Questions Due	Thursday February 9, 2012, noon
State Responses to Questions	Friday, February 10, 2012
RFO Response Due Date	Thursday, February 16, 2012, noon
Anticipated Contract Award	Thursday, March 15, 2012

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OVERVIEW

Pursuant to GC 19130 (b) (3): The services contracted are not available within civil service, cannot be performed satisfactorily by civil service employees, or are of such a highly specialized or technical nature that the necessary expert knowledge, experience, and ability are not available through the civil service system.

- **The maximum amount of this contract is \$100,000.**
- **The start date is estimated to be March 15, 2012.**
- **The work requested under this contract must be completed by June 30, 2013.**

BACKGROUND

The Information Technology Services Branch (ITSB) within the California Energy Commission (Energy Commission) is engaged in multiple information technology projects and activities including Application Development, Network Services, Customer Support and Security. The Project Management Office (PMO) is responsible for facilitating the planning and allocating of Information Technology (IT) resources across all IT efforts. An IT Governance Policy (ITGP) has been established to help identify the Energy Commission's needs and better communicate ITSB's activities in support of those needs. To assist in the identification and management of IT projects and activities, an effort to create a Master Project Plan (MPP) has been started.

PROJECT INFORMATION

The PMO seeks contracting services that will provide expertise and guidance in the further development and use of a MPP. The selected contractor will assist with developing an individual project plan template, the integration of individual project plans into the MPP as appropriate, provide guidance necessary for the PMO to track project progress from inception through closure and the assigning and balancing of resources. The contractor will also be responsible for developing necessary documentation and transferring knowledge to ITSB staff.

This assignment will involve close collaboration with our existing project management team to create and display information to optimize short-term and long-term decisions at the Division and Executive Office levels. Project information and resource allocation information must be made available in an easily integrated format.

This work is to be completed within the framework of the policies and procedures of the California Technology Agency (Technology Agency), and the Energy Commission ITGP. MS Project 2007 must be used for this work effort.

For more details about the work to be done and the deliverables, please see the Scope of Work section of this document.

RFO RESPONSES

Responses to this RFO must include a complete copy of the CMAS contract, including the price list the response is based on, and must be received no later than noon on February 16, 2012. To expedite this process clarification questions must be submitted via BidSync no later than noon on February 9, 2012. To create a question on BidSync, go to the RFO page, approximately 4 lines below the title bar click on "View Questions & Answers," then click the "Create New Question" button on the right side of the page. Responses to the questions will be posted on the RFO page at BidSync by 4:00 p.m. on February 10, 2012.

Responses must include three (3) references for the Contractor. For each Consultant, you must submit a resume and three (3) references. Please use the form in Attachment A. Interviews and reference checks will be at the discretion of the Energy Commission. To clarify terminology, the Contractor is the responding firm or company, while the Consultant is any specific individual who will perform the work. If the Consultant is also the Contractor, the Consultant's references may also be used as the Contractor references.

SELECTION CRITERIA

The following chart lists how received offers will be compared:

	Item	Section Total	Individual Item
1	Completeness	Pass/Fail	
	<ul style="list-style-type: none"> Offers received as required; date/time Contractor References (3) Consultant References (3) Consultant Resumes CMAS Contract and price list Consultant classifications and hourly rates 		Responses must "Pass" to be eligible for further evaluation
2	Experience		
	CONTRACTOR EXPERIENCE (Qualitative)	10	
	<ul style="list-style-type: none"> Background – brief profile of the company's past successful projects similar to this RFO. Please include projects that were of similar type, size/scope, and complexity. An ideal response should show a history of at least three years, and most recent project should be within the past two years. 		10
	CONSULTANT EXPERIENCE	50	
	<ul style="list-style-type: none"> Experience in developing/maintaining a Master Project Plan (two points per year of experience, to a maximum of ten points) 		10
	<ul style="list-style-type: none"> Experience in facilitating Master Project Plan working sessions (two points per year of experience, to a maximum of ten points) 		10
	<ul style="list-style-type: none"> Experience in writing documentation related to Master Project Plans (two points per year of experience, to a maximum of ten points) 		10
	<ul style="list-style-type: none"> Experience in providing training related to Master Project Plans and MS Project 2007 (two points per year of experience, to a maximum of ten points) 		5
	<ul style="list-style-type: none"> Sample Master Project Plan 		10
	<ul style="list-style-type: none"> Current PMP Certification 		5
3	Quality of Proposal Response	10	
	<ul style="list-style-type: none"> Completeness of the response in addressing the RFO, clear understanding of the work being solicited, overall organization, grammar, presentation, professionalism, clear ability to communicate 		10

4	Cost	10	
	<ul style="list-style-type: none"> Cost – See Cost Evaluation below 		10
5	References	20	
	<ul style="list-style-type: none"> Evaluation of References – Calls will only be made if the sub-total for selection criteria 2 through 4 is within 20 points of the highest score. 		20

Cost Evaluation

The maximum total of the P.O. will be \$100,000.00. The cost evaluation will be based on total dollar amount. Comparisons will be rounded to the nearest tenth.

Cost evaluation will be based as follows:

$\frac{\text{Lowest Average Contractor's Offer}}{\text{Lowest Average Contractor's Offer}} \times \text{Maximum Cost Score} = \text{Cost Score}$
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Resource	Contractor #1	Contractor #2	Contractor #3
Contractor Offer	\$75,000	\$85,000	\$100,000
	$\frac{75K}{75K} \times 10 = 10$	$\frac{75K}{85K} \times 10 = 9.5$	$\frac{75K}{100K} \times 10 = 8.8$

SCOPE OF WORK

Task Number	Description
1	Meetings
2	Master Project Plan Tool
3	Documentation and Knowledge Transfer
4	Reports

Task 1 – Meetings

Description

The contractor will attend a kick-off meeting to be introduced to the participating staff and to be given an orientation of the existing MPP tool and goals.

On a weekly basis the contractor will facilitate the MPP update meetings where changes to the MPP are reviewed and discussed. Specific activities include:

- Review and discuss MPP changes submitted to the contractor from participants during the previous week
- Prepare agendas and facilitate weekly meetings based on the agendas
- Lead the discussion to manually level or balance resources across the 10 most significant projects
- Demonstrate cross-project impacts due to resource constraints and top 10 priorities
- Show potential delays in weeks or “non-starts” for the next 90 days

Additionally, the contractor will conduct one-on-one working sessions to provide individual staff with specific training and/or knowledge transfer as requested.

On a monthly basis, the contractor will meet with the Chief Information Officer (CIO) and PMO Manager to present and discuss the monthly status reports. The contractor will be required to attend all meetings in person at the Energy Commission’s office (1516 9th Street, Sacramento, CA) unless otherwise agreed upon in advance with the PMO Manager.

Deliverables

- Kick-off/orientation meeting
- Weekly MPP meetings
- Agendas for the weekly meetings
- One-on-one working sessions for knowledge transfer, as necessary
- Monthly status meetings

Acceptance Criteria

This task will be considered complete and acceptable after each meeting is conducted.

Task 2 - Master Project Plan Tool

Description

The selected contractor will assist with the updating of the MPP, integrating individual project plans into the MPP as appropriate, developing project plan templates, providing guidance necessary for the PMO to track project progress from inception through closure and the assigning and balancing of resources.

Specific activities include:

- Further develop and maintain a MPP that will integrate project plans and activities
- Update the MPP with changes submitted from participants for the previous week to be shown and discussed at the upcoming weekly meeting
- Develop and show views for:
 - The most significant 5 – 10 milestones
 - The tasks that should have been completed the last two weeks
 - The tasks that need to be completed the upcoming two weeks
 - Other views as needed
- Further develop and maintain a resource pool for skill set roles/names within ITSB
- Manually level or balance resources across the 10 most significant projects based on input from participants
- Assist with assigning priorities to individual projects and activities
- Create project plan templates that are compatible with the MPP file's configurations

Deliverables

- Provide an updated electronic MPP at the weekly meetings reflecting the previous week's updates from participating staff
- MPP views and reports as described and needed
- Project plan templates

Acceptance Criteria

The MPP will be considered acceptable incrementally as each week's update is provided. The requested templates will be considered complete and acceptable when provided and approved by the PMO Manager.

Task 3 - Documentation and Knowledge Transfer

Description

Along with managing the MPP tool, the contractor will be responsible for developing necessary documentation, transferring knowledge and acting as a mentor to ITSB staff. The contractor will develop, document and present best practices and custom processes for what the MPP is intended to accomplish. The contractor will provide instruction and documentation on how to use the MPP including various related tool techniques in support of the processes.

Specific topics for documentation include:

- The basics of a MPP (purpose of it, how it is constructed, the role of resources, etc.)
- How to enter activities directly into the MPP, including common issues to avoid
- How to incorporate individual project plans
- How to use various common views such as two weeks surrounding the current date for the top 10 projects and activities
- How to keep the resource pool current
- The process to manually level or balance resources across the 10 most significant projects
- The process established and commonly used in the weekly MPP meetings (likely based off the standard meeting agendas)
- The processes agreed upon by participating staff in the meetings regarding various topics such as how to represent time spent on activities not specifically tracked elsewhere in the MPP
- The base set of configurations for an individual project plan to be used as a template by staff
- Several templates for individual project plans with the preset base configuration

Specific knowledge transfer or training topics include:

- Training, demonstrations or other effective methods related to, but not limited to, the above documentation items
- How to participate in the weekly meetings facilitated by the contractor
- How to assume the role of facilitator before the contractor's time is exhausted (this might be limited to designated staff)
- Specific topics related to the MPP as requested by staff

Deliverables

- A collection of documentation in an agreed upon format that accumulatively represents a MPP Participants Manual for current and future participants
- Knowledge transfer during the weekly meetings
- Training sessions with staff, as requested

Acceptance Criteria

This MPP Participants Manual will be considered complete and acceptable when the building of the MPP structure and its repeatable processes are documented.

Task 4 - Reports

Description

To help assess the progress and potentially adjust the direction of the MPP effort, the contractor will provide and present monthly status reports to the CIO and the PMO Manager. The report should include:

- Activities conducted over the past month
- An update on progress made towards the previous month's objectives
- Objectives for the upcoming month
- A summary evaluation of the progress made towards the project's overall goals
- Any recommendations related to the project's overall goals based on the current situation and project's goals

Deliverables

- Monthly status report and presentation with discussion to potentially adjust the upcoming activities

Acceptance Criteria

This task will be considered complete and acceptable after each report is presented and discussed.

ATTACHMENT A: REFERENCE FORM

Please complete three (3) reference forms for the Contractor and each Consultant.

REFERENCE #		
1. Contractor or Consultant Info		
Name:	Primary Contact Phone Number:	
Reference is for: <input type="checkbox"/> Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Both (if same)		
2. Client info		
Client Name:	Contact Name:	
Address:	Contact Phone :	
3. Project/ Work info		
Name of Project:	Dates Served on Project (from/to):	
Project Description:		
Contractor or Consultant Involvement on the Project:		
Deliverables Prepared By Contractor or Consultant:		
4. Project Measurements and Results		
Original estimated hours on project:	Actual hours on project:	
	YES	NO
Was the project or contract terminated prior to successful conclusion? If "yes," please explain the reason.		