

**RFI0033**

**REQUEST FOR INFORMATION**

**Software as a Service** **Enterprise Portfolio Project Management Application**

**RFI Title:** RFI0033

**Issue Date:** 06 February 2024

**Reference:** [RFI0033]

**Version:** 1.0

Contents

[1. Introduction 4](#_Toc157673658)

[2. Background 4](#_Toc157673659)

[3. RFI intended outcomes 6](#_Toc157673660)

[4. RFI Procedure 6](#_Toc157673661)

[5. How to submit responses to this RFI 6](#_Toc157673662)

[6. Confidentiality & Proprietary Information 7](#_Toc157673663)

[7. Costs of preparing your RFI response 7](#_Toc157673664)

[9. Contact 8](#_Toc157673665)

[10. Annex A 9](#_Toc157673666)

Glossary

|  |  |
| --- | --- |
| API | Application Programming Interface |
| EAP | Enterprise Agile Planning |
| MoD | Ministry of Defence |
| MODCLOUD | MODCloud hosts applications, data and related services for Defence applications |
| OKR | Objectives and Key Results |
| P3M | Project, Programme and Portfolio Management |
| Proj | Project |
| RFI | Request For Information |
| RIO | Risk, Issue & Opportunity |

# Introduction

**This RFI is not a bidding opportunity but a means by which industry can provide information.**

**No further discussions with industry are planned at this stage. However, any future procurement activity will be advertised in line with public procurement regulations on the Defence Sourcing Portal and Contracts Finder.**

1. Background

Navy Command are investigating a Software as a Service Enterprise Portfolio Project Management and Risk Management Application, that could potentially replace the current corporate Programme and Project Management and Reporting tool suite.

Set out below are a summarised list of the Must, Should and Could criteria the system will have to meet.

The tool MUST be:

* Easy to learn, use and master.
* Designed using a modern, clear, user friendly interface that uses Plain English, with additional accessibility layers.
* Available greater than 99% of regular office hours.
* A low-code/no-code environment for User Administration
* Fully User Admin configurable. Allowing for changes in structure, process, datafields or metadata.
* Scalable concurrent user capacity, initially c.750 rising to c.2500 without degradation to service.
* Designed to generate a unique ID for each entry and system ID for each Portfolio, Programme or Project (i.e. a Project Code).
* Capable of having a user admin controlled permissions model.
* Hierarchical in structure (Enterprise, Portfolio, Programme, Project, Task). With the ability to roll-up, drill-down and drill-through this structure, allowing management planning and assurance activity.
* Easy to navigate, preferably finding a required project, page or document in 5 clicks from the landing page
* Deployable on MODCLOUD, or other MoD hosting solution at Official & Secret (possibly with additional accreditation and time allowed to achieve this at Secret).
	+ Therefore, vendor and staff must have appropriate Security Accreditation to operate within MoD Official & in the near future Secret environments.
* Capable of recording all data entered through life, allowing version control, trend analysis and roll-back to previous states.
* Able to operate both Waterfall & Agile methodologies or hybrid.
* Have an open API, to enable data flows, both in and out to other data source and data analysis tools the Authority utilises, such as (but not limited to): Palantir Foundry, MS PowerBI, Oracle Financial Systems.
* Capable of importing data from the current toolset during the initial configuration phase.
* Able to import data in a recognised, industry standard format from other tools such as (but not limited to): MS Excel, MS Project, Primervera P6, Atlassian Jira.
* Able to export data in a recognised, industry standard format to other tools such as (but not limited to): MS Excel, MS Project, Primervera P6, MS PowerBI or Sharpcloud
* Capable of allowing users to change or view status of any element in the system in line with permissions model.
* Designed with a facility to raise and/or record documents, or at the very least link to documents in an external storage system, including version control.
* Be accessible through Google Chrome, MS Edge and MS Teams web browsers.
* Enable effective and efficient management of risk for business as usual areas that are not in a P3M environment.

It MUST also allow the user to manage the following elements of P3M:

* Risk, Issue, Opportunities, Mitigations Recording and Management, including Parent/Child relationships between levels (i.e. a Programme risk can be a parent to a project child risk, but it should also be able to be a child to a Portfolio Risk) and ability to link RIOs to mitigations and other RIOs within entities and across entities. Risk to Issue escalation functionality. Multiple Risk Scoring matrices allowing for both P3M and other specialism (Safety, Security, Environmental) risk management.
* Benefits management will include (but not limited to) mapping and realisation. Ability to link to other elements such as RIO or dependencies.
* Scheduling, with baselining, roadmapping, timelines, summary, rollups and schedule risk analysis.
* Planning Assumptions.
* Dependencies built across a matrix of entities, not just simple proj to proj.
* Governance
* Performance monitoring and reporting, internally and externally.
* Learning from Experience/ Lessons Learned Log.

The tool SHOULD be:

* Designed with in-built dashboards and reporting functionality, that allows Admin Users to build corporate dashboards and reports and users to build bespoke & ad-hoc dashboards & reports.
* Capable of re-using data, to allow single entry.
* Capable of using system single sign-on functionality
* Supported by online training materials and on screen info prompts
* Able to notify users of data ‘staleness’ via such methods as e-mail or in-built workflow notifications. Whilst having ability to mute, or conversely subscribe to desired change notifications

The tool COULD be capable of:

* Conducting strategic ‘Balance of Investment’ activity across the whole Enterprise.
* Tracking resource management and use
* Facilitating both EAP and OKR management and tracking
* AI data interrogation, either now or as a future plug-in
1. RFI intended outcomes

This RFI aims to achieve 5 outcomes:

1. Align the MOD requirement with industry capability and processes for procurement of the required solution.
2. Develop a procurement strategy that will deliver best value for money for Defence.
3. Implement an enduring solution that allows the Authority to plan its activity against an assured continuity of service, whilst also supporting foreseeable increases in demand.
4. To inform a Procurement Strategy that enables the implementation of an enduring solution.
5. To provide evidence that there is solution available that meets the Authority’s User Requirement to enable procurement activity to proceed.
6. RFI Procedure

Responses to this RFI will be reviewed by subject matter experts from different functional areas within Navy Command Headquarters.

If upon review of your submission any clarifications or additional information is required, you will be contacted using the details provided in your RFI response.

Any details provided in response to this RFI will be used for information purposes only and will not be used to determine the potential Suppliers who will be invited to bid, should the Authority proceed to tender.

The results and analysis of this RFI shall not constitute any form of pre-qualification exercise.

Any formal procurement process will be undertaken in accordance with the relevant Procurement Law.

Nothing in this RFI, or any other engagements with Industry prior to a formal procurement process, shall be construed as a representation as to the Authority’s ultimate decision in relation to the future requirement.

1. How to submit responses to this RFI

Respondents should provide responses in accordance with the format provided in **Annex A (Page 7)** quoting the RFI reference on all documentation and emails**.**

Please do not submit additional documents such as company overviews, the purpose of the RFI is to collect information related to the technical solution, any additional documents will not be included in the review process.

Any responses received after the deadline will be passed to the subject matter experts for information, however they may not be included in the RFI review meetings which are to be held immediately following the deadline.

Once completed, please return electronically to the e-mail address(es) shown below in **section 9,** no later than **12:00, Friday 8th March 2024.**

Responses will be acknowledged electronically by return e-mail.

1. Confidentiality & Proprietary Information

No information included in your response, or in discussions connected to it, will be disclosed to any other third party.

Proprietary information, where included, should be kept to minimum and must be clearly marked.

**For the purposes of this RFI, any documentation submitted should be classification OFFICIAL**.

1. Costs of preparing your RFI response

Any costs relating to the preparation and submission of a response to this RFI are the sole responsibility of the respondent.

1. Contact

Quoting the RFI reference, please submit

1. any requests for clarification
2. all responses to this RFI and
3. any questions regarding Classification of document(s) intended for submission, to:

NAVYCOMRCL-RFI@mod.gov.uk

1. Annex A

**RFI0033 Provision of a Software as a Service Enterprise Portfolio Project Management**

|  |  |
| --- | --- |
| **Question** | **Answer** |
| Company Name |   |
| Company Address |   |
| Is the company a Small - Medium Enterprise (less than 250 employees)? |  |
|    |
| Name of Company representative completing the RFI |   |
| Contact details (e-mail and telephone number) |   |
| Company website address |   |
|    |
| Main products/services/line of business |   |
| Main market sector |   |
| Number of years in this market sector |   |
| **QUESTIONS**  |
| 1. Can you provide a system that meets the essential requirements? Please provide evidence of how your product meets the requirements.
 |
|  |
| 1. Can you provide a system that meets the optional requirements? Please provide evidence of how your product meets the requirements.
 |
|  |
| 1. Does your product provide additional functionality not captured in the User Requirements? Please provide evidence of how your product exceeds the requirements.
 |
|  |
| **Innovative solutions are most welcome, even if they do not meet all of the requirements above, we would welcome the opportunity to consider the positives and negatives.** |