



STATE OF HAWAII
OFFICE OF HAWAIIAN AFFAIRS
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April 23, 2019

**REQUEST FOR PROPOSALS (RFP) NO. COO 2019-21
PROJECT MANAGEMENT SERVICES**

ADDENDUM NO. 02

AMENDMENT TO ORIGINAL REQUEST FOR PROPOSALS

1. Item VIII.B. on page 7 of the RFP COO 2019-21 reads:

Proposal Submittal. Proposals must be postmarked by the USPS or hand delivered by the date and time designated in this RFP. Any proposals post-marked or received after the designated date and time will be rejected. Electronic submissions such as electronic mail and facsimile transmissions will not be accepted.

Item VIII.B. on page 7 of the RFP COO 2019-21 shall be amended to read as follows:

Proposal Submittal. Proposals must be received at the OHA's office by the date and time designated in this RFP. Any proposals received after the designated date and time will be rejected. Electronic submissions such as electronic mail and facsimile transmissions will not be accepted.

QUESTIONS AND ANSWERS

1. Is this a new strategic plan?

At the end of 2018 OHA closed out its current strategic plan. The Trustees completed Phases I and II of the current strategic planning process and will begin Phase III soon. The new strategic plan is anticipated to be completed by the end of 2019.

2. Is there a current vendor helping with the strategic plan?

Phases I and II completed by in house resources and there will be a vendor helping to complete Phase III.

3. Whoever that vendor is for the strategic plan, can they submit a proposal?

Yes, they can. This RFP is for a completely different scope of services.

4. Will we be able to work with this vendor?

The strategic plan vendor's contract and scope of services is independent of this Project Management Services RFP. 80% of staff have been previously trained and a number of them are implementing what they have learned. We need a project management process, as there are a number of initiatives going on within the agency that need project managers. OHA would like to build its project management capabilities and capacity, so it is interested in various models, including a train-the-trainer piece.

5. What is the anticipated start date for this Contract?

July 1, 2019.

6. Is there an existing Project Management Office?

OHA currently does not have a Project Management Office.

7. Are there plans to create an organized area/department within OHA to carry forward the project management piece? Is it OHA's goal to set up its own Project Management office within the organization? Or is the approach just to train staff so that they are able to apply the project management approach and methodology to their various projects assigned?

OHA plans to have the entire organization be trained in project management strategies as well as have individuals identified specifically to project manage larger, more risky projects (e.g., technology).

OHA needs a centralized systems function in place because the organization has a significant number of on-going projects. OHA needs to be systematic and deploy projects across the organization including Board of Trustees initiatives.

8. Has there been individuals identified to be mentored and coached?

Formally, no, however, Administration has observed those who are interested in applying project management skills and desire learning opportunities and experiences. We will be looking at organizational capacity.

9. What are you looking for in a team?

We are looking to offerors to describe the resourcing proposal (e.g. large team vs. shared skill sets of smaller teams); The offeror's level of detail will demonstrate the offeror's understanding of OHA's needs. Different resources cause differences in

pricing, so it would be beneficial if your resourcing rationale supports the pricing proposal

OHA expects that the team members proposed in the response are the same team members that are assigned to and work on the project (i.e., no bait and switch). Substitutions of personnel, due to unforeseen circumstances must be approved by OHA with the expectation that the substitute is of equal or higher skill level (with no price adjustments).

10. Can you share what the budget is?

No. You can propose this to us.

11. Can you share specific problems that you are trying to solve?

There are a lot of ongoing projects (e.g. strategic plan closing, implementation of new software, advocacy, smaller division projects) that need to be completed. We need capacity to get them done and a central place to manage them. The concept is to have a centralized project management function and build the capacity within the company.

12. Section VIII, B. Proposal Submittal provides the instructions for RFP submission. Can the State (OHA) please confirm that the proposals must be *postmarked* by May 10th?

See Amendment to original Request for Proposals above.

13. Typically, our rating structure is based on all inclusive rate that includes overhead, general administration, etc. but excludes travel. Travel is marked as a reimbursable expense. Is it acceptable to the State (OHA) to present a fully loaded rate by labor category and a separate budget for reimbursable travel expenses within the cost proposal?

Yes, please include travel expenses as a separate line item in your cost proposal.

14. Section 1 – Administrative Overview, XV. Intellectual Property Rights Page 10, and Attachment 11 Page # 26 (Item 26), Ownership Rights and Copyrights - The Contractor may use and deliver copyrighted material during the training. Will the OHA honor the Contractor's Intellectual Property and ownership rights, and such material(s) be not included in transferring the ownership to OHA?

In reference to the above Section, the OHA generally expects that all work products developed by the contractor for OHA in connection with this engagement, is the property of OHA; and the Contractor must have written permission from OHA to use such materials in the future.

In the proposal, the Contractor should clearly identify items which are subject to the Contractor's Intellectual Property and ownership rights.

15. Section 2 – Scope of Services, Page 14, second para(graph) states “As the planning process for a new strategic plan begins, the OHA Administration has identified several key elements and best practices...” Could OHA share the key elements and best practices identified by the OHA Administration in the planning process for a new strategic plan?

In reference to the above Section, one key element and best practice that has been identified is the need for a centralized project management process, which the OHA is seeking assistance with through this Contract.

16. How many employees does OHA have?

Approximately 150 statewide, with a majority located on the island of Oahu at its Nimitz Highway headquarters.

17. How many are Project Managers?

There are presently no titled “Project Managers”, however, with 80% of the employees being trained on a project management methodology, there is the expectation that all employees are exposed to and implement project management practices in their own areas and projects.

18. How many are Managers and Directors who will require Portfolio Management training and coaching?

Approximately 30.

19. How many have already received basic project management training?

About 80% of employees.

20. Section 2 – Scope of Services, Page 14, B. Funding source and period of availability – Could OHA please elaborate “Nothing in this RFP shall be interpreted to mean that the OHA shall be liable to pay for services provided.” Our understanding is once there is an executed contract and the Contractor delivers the service/deliverable, OHA, upon acceptance of the service/deliverable will pay the Contractor. Please confirm our understanding.

The OHA will pay the Contractor based upon acceptance of agreed upon deliverables as specified in an executed contract.

21. Section 2 – Scope of Services, Page 16: Can the offeror submit the Certificate of Good Standing following contract award?

The Successful Offeror shall submit a Certificate of Good Standing upon Contract award.

22. Section 3 – Proposal Format and Instructions, Page 31 & 32 – Please clarify the difference between the Professional Reference(s) on page 31 and Past Performance on page 32. Can the reference contact and related details be the same for both?

Professional References are a person/organization/business/etc. that can vouch for your qualifications and work performance. Past performance refers to projects completed and actions taken under previous contracts with similar scopes of services. Yes, the information may be the same.

23. Does OHA currently have project management process information or policies that OHA can share?

No. The Successful Offeror will be expected to assist the OHA in creating a project management process and portfolio management process for the agency.

24. How many current projects are in the OHA portfolio? Are these projects in the portfolio categorized by certain types? If yes, what are these categories?

At this point, there are a handful of projects that can be classified in the following categories—technology, systemic research, legal analysis, Board initiatives.

25. How are project resources currently being managed? How is OHA currently organized for Project Management?

Currently, projects are being managed by individual project managers in the way that works for them. Some are implementing the project management practices that they learned in the previous training. However, there is no centralized mechanism to identify and manage organization wide projects.

26. Page 24, Section Note: Approximately 80% of OHA’s staff have been trained on a project management methodology described as the ‘waterfall’ method; and the OHA would prefer the plan, documentation, training, etc. be aligned to this methodology. What kind of training was received by OHA staff?

In reference to the Section above, approximately 80% of OHA staff has received training based on the Project Management Institute’s Project Management Body of Knowledge.

27. Who provided the training to the staff? Was it provided by a training organization?

The training was provided by Mana‘olana International, LLC.

28. How long ago was the training provided?

The training took place between 2017-2018.

29. Would we be able to review the curriculum for the basic project management training that was previously offered to OHA staff? Do you have documentation available on what the staff was trained on so that the selected vendor can review and assess what staff have been trained on?

The Successful Offeror will be given documentation regarding the previous training to assist in planning and implementation.

30. Page 14, Section A. – “...any additional training and processes would need to build on existing staff knowledge and skills.” Is OHA looking for training to be tailored based on topics that OHA would like to focus on for Project Management training? Or is OHA looking for training to be part of an already existing course by a training organization that is provided to project management professionals?

The OHA’s goal is to infuse more Project Management concepts and optimal practices into the day-to-day and long-term organizational processes. The training does not need to be part of an already existing course but should be consistent with what has been previously provided (to the 80% of OHA) for consistency of terminology and concepts..

31. Is part of the project to develop the tools and templates that will be used as part of the Project Management methodology to be implemented at OHA? Are there any current project management tools/templates already in use and these need to be “tweaked” or tools/templates need to be developed?

Yes. Although 80% of staff have been previously trained and a number of them are implementing what they have learned, there are no formal tools/templates in place. One Division is piloting the use of existing tools such as project charter, project status report, work plan, etc.

32. Page 26, Section 3 Trainer - The Successful Offeror shall provide the basic/introductory Project Management training for approximately 25 Full-Time Employees (hereinafter “FTE”) in two (2) to three (3) sessions – Is there a suggested training approach for the number of hours of training to occur in these sessions? Or is OHA flexible on the training curriculum depending on the focus on the type of training that needs to be provided based on staff needs?

In reference to the Section above, approximately 80% of OHA’s staff have been trained on a project management methodology described as the “waterfall” method; and the OHA would prefer the plan, documentation, training, etc. be aligned to this methodology. The remaining approximately 25 FTE shall be trained in alignment to this methodology. OHA looks to the offeror to suggest the optimal approach to delivery of the training to smaller training sessions (8 to 12 participants/session) to effect higher engagement opportunity.

33. Is OHA looking for a fixed price contract or a contract based on time and materials basis?

This is a fixed price contract, deliverables based contract and will be based on the final negotiated cost upon award.

34. Is OHA looking for a person or persons to be full-time for the duration of the year or is work to be performed as needed and per the project schedule developed? Is the person or persons required to be on-site at OHA's location?

Work performed under this Contract shall be proposed by the offeror, and your resources should match your proposed cost and schedule. The person(s) whose resume(s) are used in the proposal shall be the person(s) on-site providing the consulting, training, coaching mentoring, and monitoring services.

OHA expects that the team members proposed in the response are the same team members that are assigned to and work on the project (i.e., no bait and switch). Substitutions of personnel, due to unforeseen circumstances must be approved by OHA with the expectation that the substitute is of equal or higher skill level (with no price adjustments).

35. For the Standard Operating Procedures (SOPs) that OHA would like developed, are there standard templates already in place for SOPs? Or will the format/template need to be developed as part of this project?

The OHA's standard SOP template will be used for the final SOPs developed through this Contract.

36. Has OHA already explored sending their staff to existing Project Management training available in Hawaii where your staff could sign up for trainings or have an instructor come on-site to provide project management fundamentals training? If yes, why was that route not pursued in training your staff?

By training approximately 80% of the staff, OHA committed to holistically providing the training for the entire agency together vs. individuals signing up on their own and effectively was delivered by one provider for consistency.

37. Page 26, Section 3 Deliverables – Is OHA looking for the trainings listed below to be tailored for OHA based on OHA's needs/requirements? Are these training sessions expected to be on site? Or is OHA looking for project management training/course that is available as part of a class or trainings provided for project management certification exam?

Deliverables

- i. Completion of basic/introductory Project Management training session(s);
- ii. Completion of Advanced Project Management training and coaching session(s); and
- iii. Completion of Portfolio Management training and coaching sessions(s).

In reference to the Section above, yes, trainings should be tailored to OHA's needs. All trainings shall be on-site. This scope of services is not intended to address

individual project management certification exam preparation, which should be a part of individual OHA employee's professional development plan.

38. Would OHA be open to engaging an organization whose main purpose is to provide project management training to organizations? Or is OHA looking for an organization that provides project management services and have the ability to train OHA staff on Project Management concepts?

OHA is looking for a Project Management professional(s) to provide consulting, training, coaching, mentoring, and monitoring services to the OHA.

39. What types of projects do OHA personnel manage?

There are many different types of projects that OHA personnel manage that include but are not limited to event planning (e.g., all-staff meetings), grant solicitation, evaluation, awarding, contracting, monitoring, cross-agency research, , system implementation of new software agency-wide, Board permitted interaction groups, intranet design and update.

40. Are any current OHA staff certified Project Managers? If yes, how many Project Management Professionals (PMP) does OHA currently have on staff?

At this point, there are no PMP certified Project Managers.

41. Can you define further the content and expectations of the Evaluation Plan and Evaluation Report requested as a deliverable for the Project Management and Portfolio Management areas?

OHA expects the offeror to describe the proposed content of the Evaluation Plan and Report (separate deliverables). The Evaluation Plan shall be developed by the Contractor and the OHA and will describe how the Project/Portfolio Management functions will be evaluated after implementation. The Evaluation Report shall be developed by the Contractor and will describe the Contractor's evaluation of the work involved in developing the Project/Portfolio Management processes.

42. Page 25, Project Management Process – Does OHA have a monitoring tool already used in the organization?

In reference to Section 2, Item IV.A.1. Project Management Process, no, development of a monitoring tool is a deliverable of this Contract.

43. Page 27, Qualifications and Requirements – If we are proposing a team to assist OHA, do all members of the team need to have a PMP or will project management experience be sufficient (i.e. a team comprised of a mixture of PMP certified staff along with support staff)?

In reference to Section 2, Item IV.A. Qualifications and Requirements on page 27 of the RFP, if a team member is providing direct services as described in this RFP to the OHA and/or its personnel, the team member shall hold a Project Management certification from a professional Project Management association.

44. Page 32, Proposal Forms – For our proposal submission it is required that the proposal be spiral bound and not in a three-ring binder. Does OHA consider “comb binding” as a form of spiral binding? From Wikipedia “Comb binding is one of many ways to bind pages together into a book. This method uses round plastic spines with 19 rings (for US Letter size) or 21 rings (for A4 size) and a hole puncher that makes rectangular holes. Comb binding is sometimes referred to as plastic comb binding or spiral comb binding.”

In reference to Section 3, Item II.F. on page 29 of the RFP, yes, comb binding is acceptable.

45. Page 27, Qualifications and Requirements – Are the short, medium, and long-term goals already defined or is the Successful Offeror expected to determine these goals?

In reference to Section 2, Item IV.A.1.c. on page 27 of the RFP, the Successful Offeror shall propose short, medium, and long-term goals as part of their action plan.

46. Page 34, Financial Capacity – What does OHA require to demonstrate financial capacity? What is financial capacity?

In reference to Section 3, Item e.F. Financial Capacity on page 34 of the RFP, state the status of current projects/workload and provide information as to your financial capacity to complete an additional project in a timely and orderly manner, should you be awarded this Contract. The OHA will also review the most recent audited statements of the Successful Offeror.

According to the International Risk Management Institute, financial capacity is “the financial limit of an organization’s ability to absorb losses with its own funds or borrowed funds without major disruption.”

47. From OHA, is there a person identified as the lead contact for the Successful Offeror to work with? What role and responsibility will that person fulfill during the project?

Once executed, the Chief Operating Officer will be the contact for this Contract. At a minimum, this person will act as the principal liaison between the Contractor and the OHA, assist in resolving policy questions, expediting decisions, and review and approve the work performed.