	CITY OF HOUSTON **INFORMATION TECHNOLOGY SERVICES** **S17-I00324** **NOTICE OF INFORMAL REQUEST FOR PROPOSAL**	**STRATEGIC PURCHASING DIVISION** 901 Bagby Street, Concourse Level Houston, Texas 77002 (832) 393-8725 Off. (832) 393-8758 Fax

DESCRIPTION OF SERVICES

The City of Houston Information Technology Services Department ("the City") is soliciting proposals from qualified professionals specializing in enterprise content management analysis.

Please review the Scope of Work/Services below. If you should you have additional questions regarding the RFP or believe that your company/organization meets the minimum requirements as outlined in the Scope of Work/Services of this RFP; please submit your response to Murdock Smith, Sr. Procurement Specialist, via one of the following methods listed below by **11:00 a.m. CST, Friday, June 20, 2014:**

E-mail (Preferred Method): murdock.smith@houstontx.gov
Fax: (832) 393-8759

Mail: City of Houston
Strategic Purchasing Division (Suite 500. Room B514)
901 Bagby Street
Houston, TX 77002

SCOPE OF WORK/SERVICES

1.0 INTRODUCTION

1.1 The goal of this Enterprise content management analysis is to review the City of Houston's current state of content management systems at an enterprise level across all departments (document systems, web portals, file servers, to name a few), determine pain points and business improvement opportunities, and ultimately develop an Enterprise Content Management Strategy and Roadmap.

2.0 BACKGROUND

2.1 Enterprise Content Management (ECM) affects business processes, employee productivity, and City legal liability. Supporting numerous sources of content throughout the City, using a variety of systems, results in increased systems and support costs. Issues with locating information reduce the productivity of employees and increases the effort required to respond to public information or discovery requests. A lack of oversight and adherence to document retention schedules of content sources increases risk to the organization. A strategy for ECM allows the prioritization of these and other business issues, and helps define foundational projects to begin the improvement process.

3.0 SCOPE OF SERVICES

3.1 Services provided will include ECM analysis for all City of Houston departments where feasible within the project timeline.

3.2 To meet the project timeline, departments should be grouped together where appropriate.

3.3 Scope does not include implementing a technology solution.

4.0 REQUIREMENTS: SERVICES TO BE PERFORMED

4.1 Conduct Current State Analysis / Future Vision

4.1.1 The key objectives are to consolidate and review the results of any previous work completed by the City of Houston, layout the city-wide overview of existing systems and sources of content and solidify the vision and purpose of the ECM program. The specific activities and deliverables should be:

4.1.1.1 Conduct vision and collaboration meetings
4.1.1.2 Review current systems
4.1.1.3 Review current documentation

4.1.2 The specific deliverables shall include:

4.1.2.1 ECM Vision Statement
4.1.2.2 ECM Current State Analysis

4.2 Identify Key Stakeholders

4.2.1 The key objective is to formally conduct conversations required to identify City stakeholders to ensure all appropriate City departments and divisions are represented. The specific activities shall include:

4.2.1.1 Stakeholder identification and analysis
4.2.1.2 Mapping stakeholders to systems and processes
4.2.1.3 Workshop planning
4.2.1.4 Develop the program communication vision and plan

4.2.2 The specific deliverables shall include:

4.2.2.1 Stakeholder Analysis
4.2.2.2 Workshop Agendas
4.2.2.3 Program Communication Plan
4.2.2.4 Roadmap detailed project plan

4.3 Interviews and Information Gathering

4.3.1 The identified stakeholders shall be included in the planning and prioritization of efforts within an ECM program via a series of workshops within each City department/division that has been identified during stakeholder analysis. Where appropriate, the workshops shall be topical and specific to the department/division. The specific activities shall include:

4.3.1.1 Execute Workshops
4.3.1.2 Consolidate feedback
4.3.1.3 Validate takeaways and outcomes
4.3.1.4 Identify common themes and outlier needs and challenges

4.3.2 The specific deliverables shall include

4.3.2.1 Interview Minutes
4.3.2.2 Consolidated Results from Activities above

4.4 Future State Planning

4.4.1 Based on the workshop results, a future state plan should be created that conforms to the vision of the ECM program and that is aligned with the stakeholder expectations of the ECM program. This future state will clearly outline the expectations and functionality of the ECM program over various timelines, including phasing and software requirements or suggestions for each phase. The specific activities shall include

4.4.1.1 Develop conceptual architecture
4.4.1.2 Functional or System alignment
4.4.1.3 Phasing for solution
4.4.1.4 Software alignment

4.4.2 The specific deliverables shall include

4.4.2.1 ECM Program Goals (phased)
4.4.2.2 ECM Program Software alignment (phased)
4.4.2.3 ECM Solution Architecture (phased)

4.5 Define Projects

4.5.1 The definition of the projects will likely be the most comprehensive activity of this effort. This includes identifying all necessary projects to achieve the defined future state. Additionally, the projects will be defined in detail as to estimate the timing, length, effort, dependencies and risks. The deliverables should closely be structured as inputs into the City of Houston's process for project definition and approval. The specific activities shall include:

4.5.1.1 Define foundational projects
4.5.1.2 Further identify and detail each project

4.5.1.3 Creation of roadmap

4.5.2 The specific deliverables shall include:

4.5.2.1 ECM program project roadmap
4.5.2.2 ECM program project details

5.0 PROJECT EVENTS AND TASKS

5.1 Project will last no more than 5 weeks.

5.2 **Week 1:** Future Vision collaboration with management; Current State Analysis begins by reviewing current systems, solutions and documentation

5.3 **Week 2:** Identify Stakeholders and begin communications with departments on ECM vision, departmental content management analysis and processes, plan group sessions, set up meetings and locations

5.4 **Week 3:** Interview stakeholders across departments, conduct working group sessions, gather and consolidate feedback and identify commonality and challenges

5.5 **Week 4:** Develop Future State plan, such as conceptual architecture, system and software alignment, possible phased plan approaches.

5.6 **Week 5:** Define foundation projects with details on each project for resources, timelines and costs, create the roadmap and strategy

6.0 PERIOD OF PERFORMANCE

6.1 Implementation of the Solution will occur within **five weeks** of execution of this Statement of Work. This includes delivery of the products and services necessary to implement the solution, training, and any support, other than on-going maintenance services.

7.0 INVOICES

7.1 Vendor will invoice based on the completion of milestones. The milestones and approximate invoicing dates should be aligned with the schedule described in this SOW.

8.0 PROJECT EVENTS AND TASKS

8.1 Project events will be furthered defined at the kickoff. Minimum requirements include: weekly status reports and iterative site reviews.

9.0 PERIOD OF PERFORMANCE

9.1 Implementation of the Solution will occur within **12 weeks** of execution of this Statement of Work. This includes delivery and installation all of the products and services necessary to implement the Solution, training, and any support, other than on-going maintenance services.

10.0 INVOICES

10.1 Proposers shall describe their responsibilities for invoicing the City of Houston.

11.0 DELIVERABLES

11.1 Milestones, Deliverables, Schedule and Payment Schedule. The following table identifies possible milestone events and deliverables, the associated schedule, any associated payments.

Milestone Event	Deliverable
Project Kickoff Meeting	Project overview
Project Management & Planning	• Project setup • Timeline & milestone setup • Business objectives survey • Design objectives survey • Iterative website review • customer profile brief • Conversion workflow • Sitemap
Website Redesign	Redesigned website based on Heuristic UI/UX
Tablet/Mobile Design	A mobile tablet design of the City of Houston Website
Website Drupal Framework	Redesigned houstontx.gov website
Quality Assurance	Quality assurance review

11.2 Deliverables must be provided in the specified timeframes. Any changes to the delivery date must have prior approval (in writing) by the Project Manager/Contract Manager or designate.

11.3 All deliverables must be submitted in a format approved by the Project Manager/Contract Manager.

11.4 All deliverables must have **acceptance criteria established and a time period for testing or acceptance.**

11.5 If the deliverable cannot be provided within the scheduled time frame, the selected vendor is required to contact the Project Manager/Contract Manager in writing with a reason for the delay and the proposed revised schedule. The request for a revised schedule must include the impact on related tasks and the overall project.

11.6 A request for a revised schedule must be reviewed and approved by the Project Manager/Contract Manager before placed in effect. Contract Terms and Conditions may dictate penalties, costs, and other actions based on the facts related to the request for a revised schedule.

11.7 The Project Manager/Contract Manager will complete a review of each submitted deliverable within specified working days for the date of receipt.

11.8 A kickoff meeting will be held at a location and time selected by the Project Manager where the Selected vendor and its staff will be introduced to the Customer, preferably 611 Walker building.

12.0 ACCEPTANCE TESTING

12.1 Applicable to software/hardware, engineering products, structural mechanisms, models, design/build projects, etc. Identification of specific procedures or criteria that need to be applied to test the end product or ensure that it functions in accordance with established design specifications or technical requirements or verify the integrity of the deliverable.

13.0 ACCEPTANCE CRITERIA

13.1 Acceptance Criteria for this implementation will be based on the City of Houston PO acceptance language. Each deliverable created under this Statement of Work will be delivered to the Project Manager/Contract Manager with a Deliverable Acceptance Receipt. This receipt will describe the deliverable and provide the Project Manager with space to indicate if the deliverable is accepted, rejected, or conditionally accepted. Conditionally Accepted deliverables will contain a list of deficiencies that need to be corrected in order for the deliverable to be accepted by the Project Manager.

14.0 ASSUMPTIONS, PROJECT ROLES AND RESPONSIBILITIES

14.1 City of Houston will provide the infrastructure and software required for implementation.
City of Houston will provide remote secure access to infrastructure and software to the selected vendor The selected vendor will deliver the implementation for a fixed price

15.0 REPORTS AND MEETINGS

15.1 The Selected vendor is required to provide the Project Manager/Contract Manager with weekly written progress reports of this project. These are due to the Project Manager/Contract Manager by the close of business on the same day of each week throughout the life of the project.

15.2 The progress reports shall cover all work performed and completed during the week for which the progress report is provided and shall present the work to be performed during the subsequent week.

15.3 The progress report shall identify any problems encountered or still outstanding with an explanation of the cause and resolution of the problem or how the problem will be resolved.

15.4 The Selected vendor will be responsible for conducting weekly status meetings with the Project Manager/Contract Manager on specific day of each week. The time and place shall be designated or revised by the Project Manager/Contract Manager. The meetings can be in person or over the phone at the discretion of the Project Manager/Contract Manager.

16.0 FURNISHED EQUIPMENT AND WORK SPACE

16.1 Houston IT Services will provide remote secure access to infrastructure and software to the selected vendor.

17.0 TRAVEL

17.1 Houston IT Services does not cover travel expenses.

19.0 PILOTS CONDUCTED

19.1 None

20.0 REQUIRED DOCUMENTS:

20.0 Licenses and certifications

20.1 Resumes of key personnel/proposed staff

20.2 Client references which proposer has delivered/prepared a similar Project Plan

20.3 Brief overview of consultant's experience and an explanation of the proposer's understanding of the work that must be accomplished and the timeframe requirement.

20.4 Proposed Fee Schedule (Must be submitted in separate sealed envelop marked **"pricing").**