



DRMcNATTY
PROJECT CONTROLS SOLUTIONS



OCIT PM & PPM Tool Assessment Findings Report

August 27, 2020

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Agenda

- Assessment Overview
 - Approach and Participants
- Current State and Future Vision
 - Summary of Findings
- Requirements and Scorecard
 - Ranked Expectations by Category
- Application Review Findings
 - Applications Reviewed and Ratings by Category



Assessment Overview

- The County of Orange Information Technology department identified a need for stronger Project Management (PM) and Project Portfolio Management (PPM) tools
- Countywide review of:
 - PM & PPM tools currently in use
 - Effectiveness of existing tools
 - Requirements for future tools

Overview: Assessment Purpose

- Understand the functional gaps in the applications currently used Countywide to manage IT projects
- Identify features needed for a more cohesive and robust solution to be used as requirements for future tool selection
- Review cross section of vendor applications to:
 - Confirm requirements identified are viable and represent County needs
 - Gain a better understanding of the types of solutions available
 - Rate capabilities of solutions to determine their strengths, weaknesses and alignment with County requirements

Overview: PM & PPM Categories

- PM & PPM categories assessed
 1. **Schedule Management** involves planning, tracking, and reporting on project activities, tasks and milestones to provide and maintain a realistic timeline for the project.
 2. **Requirements and Scope Management** involves the identification, verification, tracking, and confirmation of the project requirements to ensure the end result meets the business and technical needs.
 3. **Collaboration** is the facilitation of the day-to-day exchange of ideas, discussions, decisions, issues solutions, documents, and information between team members to achieve the project objectives.

Overview: PM & PPM Categories

- PM & PPM categories assessed (continued)
 4. **Communication Management** is the official exchange of project information through reports, meetings, meeting minutes, documents, and other channels to ensure the right people get the correct information in a timely manner to make informed decisions.
 5. **Document Management** involves the creation, versioning, markup, distribution, approval, storage, and retrieval of project documentation. Documents may include requirements documents, design documents, diagrams, etc.
 6. **Resource Management**, in the context of project and portfolio management, focuses on the roles, availability, and usage of personnel. This is done to make sure the right people are assigned to the right activities in order to complete the work on time while managing resource allocation and bandwidth.

Overview: PM & PPM Categories

- PM & PPM categories assessed (continued)
 - 7. Risk Management** identifies potential problems and takes action to prevent them from impacting the project. Risks are assessed based on the probability that they will occur and the significance of the impact in the event that they do.
 - 8. Issue Management** addresses active problems impacting the project now or in the immediate future. Where Risks might happen, Issues are happening. Typically issues are identified, assigned, and tracked until resolved.
 - 9. Reporting** is the ability to present project information in a clear and effective manner either directly from within an application or by extracting data for delivery in a different application.

Overview: PM & PPM Categories

- PM & PPM categories assessed (continued)
 - 10. Budget Management** includes budget planning, tracking of actual costs, forecasting future costs, and reporting on project costs.
 - 11. Change Management** identifies when there is a variance from the agreed upon scope, budget, or schedule of the project and addresses it in a way that all parties understand and agree to the change. The process involves requesting, analyzing, approving, developing, implementing, and reviewing unplanned change(s).
 - 12. Portfolio Management** centralizes the oversight of a group of projects because they impact the same area, are part of the same budget, or have something in common that requires oversight, direction, and reporting as a set or program. The focus is on the selection, prioritization and management of projects within the organization.

Overview: Approach

- Assessment
 - Conduct a Countywide survey
 - Conduct group and one-on-one interviews
 - Develop Requirements and Scorecard
- Solution Analysis
 - Select cross section of solutions
 - Provide demonstrations and rank each solution
 - Analyze strengths and weakness of each application
 - Compile and present the results



Overview: Survey Participants

- Opened to all Agencies and Departments
- Survey respondents:
 - Assessor – Team lead of ATS Infrastructure group
 - Clerk-Recorder – IT Manager
 - District Attorney – Business Analyst (2)
 - Health Care Agency – IT PMO
 - OC Information Technology
 - Director of Operations
 - Network Manager
 - PMO Manager
 - PMO Project / Program Manager (5)
 - Director E-Gov Software Applications
 - Sherriff's Department – IT Project Manager
 - SSA Application Development – IT Manager

Overview: Interview Participants

- Agencies and Departments Interviewed:
 - Auditor-Controller
 - Health Care Agency
 - OCIT
 - Application Development
 - Business Analysis
 - Data Center Services
 - Program Management Office
 - Social Services Agency (IT)



Overview: Assessment Results

- Survey Results
 - PowerPoint available
- Interview Notes
 - Summary of each interview available
- Requirements
 - Scorecard by category with ranked PM & PPM features

Current State Findings

- Stand-alone tools used to manage County IT projects

Tools	Clerk-Recorder	DA	E-Gov Dev	HCA IT	OC Assessor	OCIT	OCSD	SSA App Dev
ERP extracts						X		
GoToMeeting				X			X	
Jabber						X		
Microsoft Excel	X	X	X	X		X	X	X
Microsoft Office365			X			X		
Microsoft Outlook			X	X		X	X	
Microsoft PowerPoint				X		X		X
Microsoft Project			X		X	X	X	X
Microsoft Teams		X	X		X	X	X	
Microsoft Visual Studio			X			X		
Microsoft Word		X	X	X		X	X	X
OnBase					X			
OneDrive		X				X		
OneNote						X		
Power BI		X						
Project Tracker						X		
Remedy							X	
ServiceNow						X		
Sharepoint		X	X	X		X	X	X
Skype			X	X		X	X	
SQL Server Reports	X		X			X		
VTI								X
WebEx							X	
Workfront				X				

Information collected from Survey



Current State Findings

- Current tools are “Sufficient” but not “Effective”
 - 7 of 12 Categories received 0 “Effective” responses (●)
 - 3 of 12 Categories received only 1 “Effective” response (■)
 - Reporting and Portfolio Management received 57% and 70%* “Needs Improvement” responses

Category	Effective	Sufficient	Needs Improvement	N/A or No Knowledge
1. Schedule Management	2	10	4	0
2. Requirements & Scope	● 0	12	4	0
3. Project Team Collaboration	5	10	0	0
4. Communication Management	■ 1	9	4	0
5. Document Management	■ 1	12	1	0
6. Resource Management	● 0	6	6	2
7. Risk Management	● 0	9	4	1
8. Issue Management	● 0	11	1	2
9. Reporting	● 0	6	8	0
10. Budget Management	● 0	6	5	3
11. Change Management	■ 1	8	5	0
12. Portfolio Management	● 0	3	7	4

*adjusted to remove N/A or No Knowledge Responses



Project Management Findings

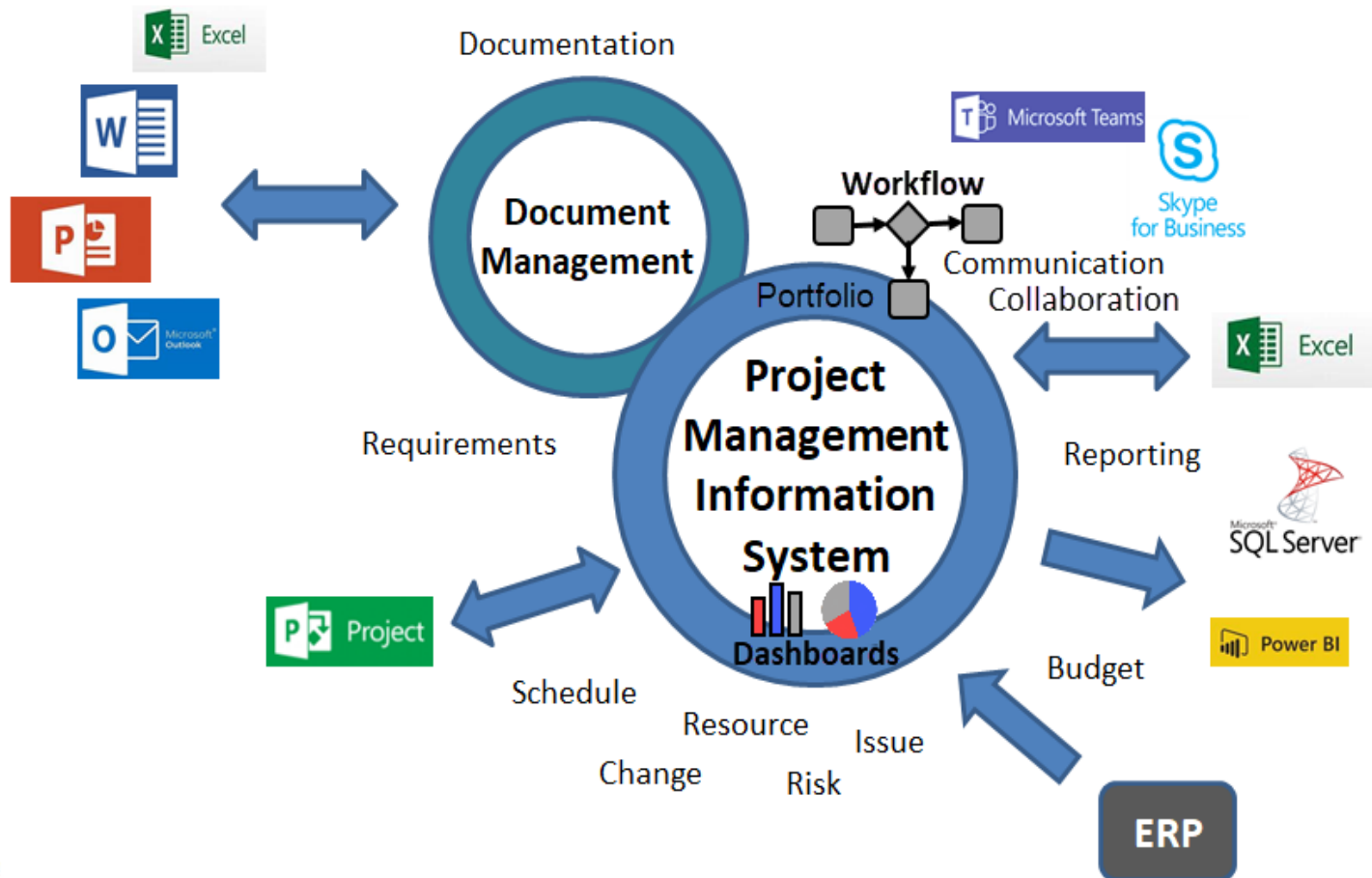
- No standardized tool for actively managing or providing real time visibility to Countywide IT projects
- Use of multiple applications to capture similar data results in duplicate data entry, inconsistent information across tools, and no true source of record
- Tools lack the ability to track, analyze and report on Project level data
- SharePoint's security options lack the granularity to limit the amount of access granted to users, potentially providing ability to modify project data
- Tools do not facilitate timely and effective status update

Portfolio Management Findings

- No centralized source of record for Project information
- Project Tracker is used to capture OCIT project information
 - Manually updated from the tools used to manage the projects
 - Not maintained until needed for reporting
 - Only contains high level, summary information
 - No drill down analysis available
- Portfolio Analysis and Reporting, including the Quarterly Progress Report, is manually produced, time consuming, and quickly outdated
 - Project Managers provide project information from the various tools they use to manage the projects
 - PMO manually collects, reviews, reconciles, and compiles project data over several weeks
 - Excel is used to create graphs to be placed in PowerPoint

Future Vision

- Project Management Information System (PMIS) to provide a robust and cohesive toolset for managing IT Projects



Future Vision

- Single application or fully integrated Project Management Information System (PMIS)
- Centralized repository to both manage and report from
- Single source of record
- Dashboards to present high-level information with drill down capabilities to the project details
- Workflow to guide processes and obtain approvals

Current to Future Contrast

	Current State	Future Vision
1	Schedule Management based on single projects, maintained on individual project managers' computers	Schedule Management that enables multiple projects to be managed together with dependencies between their activities and is visible to the PMO and Management
2	Requirements and Scope Management documented in Word, Excel, and Visual Studio and passed back and forth via email for review, feedback, and approval	Requirements and Scope Management documented as needed and managed through Document Management functionality to provide feedback, redlining, versioning, and automated approval workflow
3	Collaboration through MS Teams, Skype, and other tools, separate from the project information	Collaboration that integrates with other project management tools to tie discussions, notifications, and progress updates to the project / activities

Current to Future Contrast

	Current State	Future Vision
4	Communication external to the project information through email, MS Teams, Skype and other tools	Communication that retains meeting agendas and minutes, status reports, and feedback with the project or artifact
5	Document Management through SharePoint does not allow for feedback and approval. In addition, SharePoint security is not granular enough to limit visibility and access to specific items.	Document Management with granular security rights; storage and access to documents across projects; and document review, markup, feedback, and approval workflow
6	Resource Management that lacks visibility to utilization and availability because it is disconnected from the actual work assignments and does not provide resource allocation across all projects.	Resource Management tied directly to assignments to roll up allocation across all projects enabling availability and utilization analysis; visibility to all activities assigned; role based planning; and future needs assessment

Current to Future Contrast

	Current State	Future Vision
7	Risk Management performed in Excel or SharePoint with limited visibility across the Portfolio.	Risk Management that includes identification, evaluation of probability and impact (schedule and cost), risk response planning, execution, controlling, and reporting
8	Issue Management performed in Excel or SharePoint with limited visibility across the Portfolio	Issue Management tied directly to specific activities and fosters active, engaged identification, ownership, updates, tracking, and reporting
9	Reporting that is time consuming, manually compiled from multiple sources, and generated using Excel and PowerPoint with data that quickly becomes stale	Reporting produced from project data with directed dashboards tailored to provide information specific for the individual's role; standard and custom reports; and analytical tools



Current to Future Contrast

	Current State	Future Vision
10	Budget Management available through a monthly extract from finance; difficult to align project spend to financials	Budget Management linked directly to project activities through an interface to pull actuals into the schedule, return update forecast to the financial system, and provide visibility
11	Change Management managed with Excel, Word, and email with follow up in meetings and phone conversation to document and gain approval of changes	Change Management that identifies the need for change through variance reports, documents the change on a standardized form, and routes it for automated approval using workflow
12	Portfolio Management that consists of SharePoint forms, manually extracted data, Excel spreadsheets, and time consuming PowerPoint reports	Portfolio Management that includes project request, intake process, centralized data, analytical tools, single source of information, and accurate and timely reporting

Requirements and Scorecard

- Requirements were created to outline the needs of a new Project Management Information System (PMIS)
- Focused on each of the 12 PM & PPM Categories
- Based on the Current State and Future Vision findings
- Identifies specific functions or attributes expected
- Each requirement ranked 1 – 3 for importance to the PMO
 - 3 = Must Have
 - 2 = Should Have
 - 1 = Nice to Have
- Scorecard created to rate application demonstrations on a scale of 0 – 3 with 0 indicating that it does not perform the functionality and 3 that it clearly fits the requirement

Application Analysis

- Project / Portfolio Management Software companies were invited to participate by providing a demonstration of their proposed solution
- Selected cross section of PM & PPM tools based on identified leaders, industry knowledge, and initial review
 - Celoxis
 - Clarizen (2019 Gartner Magic Quadrant Visionary)
 - Hive
 - Primavera Cloud
 - Project Insight
 - UGovernIT
 - Workfront (2019 Gartner Magic Quadrant Visionary)
 - Wrike

Planview (2019 Gartner Magic Quadrant Leader) declined to participate unless it was an RFP

Gartner is a good indication of who the players are in the industry, but candidates must pay to be considered. Some strong companies opt not to be included in the Gartner survey.

Analysis: Demonstrations

- Issued invitation with Requirements Scorecard and Pricing & Additional Questions worksheet to each participating company
- Scheduled and held 90 minute sessions
- Completed Scorecard for each solution based on demonstration and additional documentation provided
- Compiled and analyzed results
- Review and scoring performed by D.R. McNatty consultants
- OCIT PMO participated in the demonstrations as observers

Analysis: Scoring

- Score calculated by:
Value (C) = Rank (A) * Score (B)

PM & PPM Tool Assessment						
Company:		Company Name			Date: 7/1/2020	
Application:		Solution Name				
Presenter(s):		Presenter Name				
Schedule Management						
Schedule Management involves planning, tracking, and reporting on project activities, tasks and milestones to provide and maintain a realistic timeline for the project.						
Requirement	Expectation	Rank	Score	Value	Evaluation Notes	
Schedule Development	Work Breakdown Structure (WBS) with summary information Activities Milestones Predecessor / Successor relationships between Activities Gantt Chart (display and print) Display Time Phased data in Years, Quarters, Months, Days, Financial Periods	2 (A)	2 (B)	4 (C)	Can do comments when statusing an activity. If name is entered into comment it will send them notification. Status' are Not Started, In Progress, Almost Done, Done for example.	
Inter-project dependencies	Predecessor / Successor relationships to activities in other projects	3	3	9	Fully supports linking activities between projects	

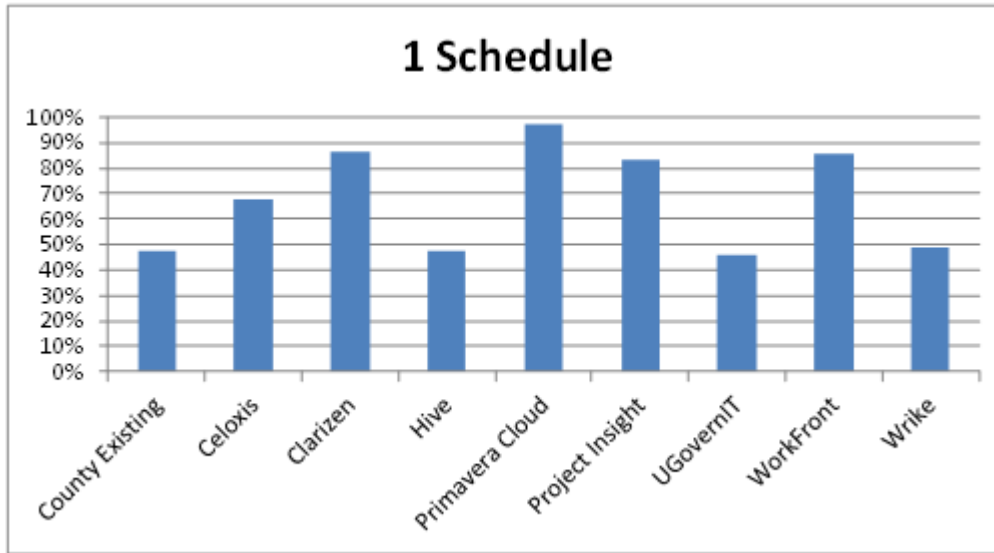
- Each Category is score based on the points earned divided by the max points for the Category to give a % indicating how well it met the requirements
- Total % score is an average of the Category % scores

Application Analysis: Results

	Score
1. Project Insight	76%
2. Oracle Primavera Cloud	72%
3. Clarizen	72%
4. Workfront	71%
5. Celoxis	56%
6. UGovernIT	44%
7. Wrike	43%
8. Hive	41%

% Score reflects fit to all requirements

Analysis: Schedule & Requirement/Scope

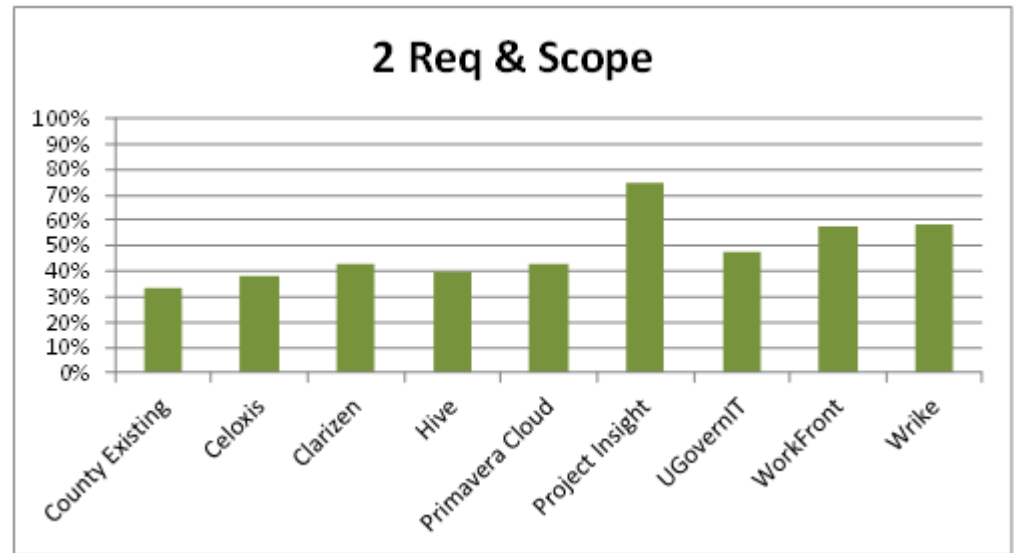


Schedule Management

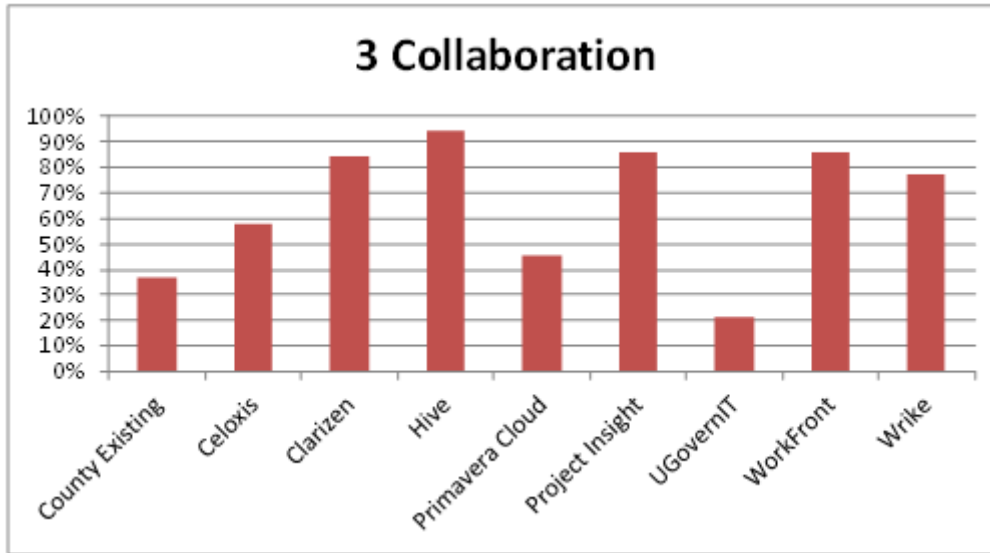
1. Primavera Cloud	98%
2. Clarizen	86%
3. Workfront	86%
4. Project Insight	83%
5. Celoxis	68%
6. Wrike	49%
7. County Existing	48%
8. Hive	47%
9. UGovernIT	46%

Req & Scope Management

1. Project Insight	75%
2. Wrike	59%
3. WorkFront	58%
4. UGovernIT	47%
5. Primavera Cloud	42%
6. Clarizen	42%
7. Hive	39%
8. Celoxis	38%
9. County Existing	33%



Analysis: Collaboration & Communication

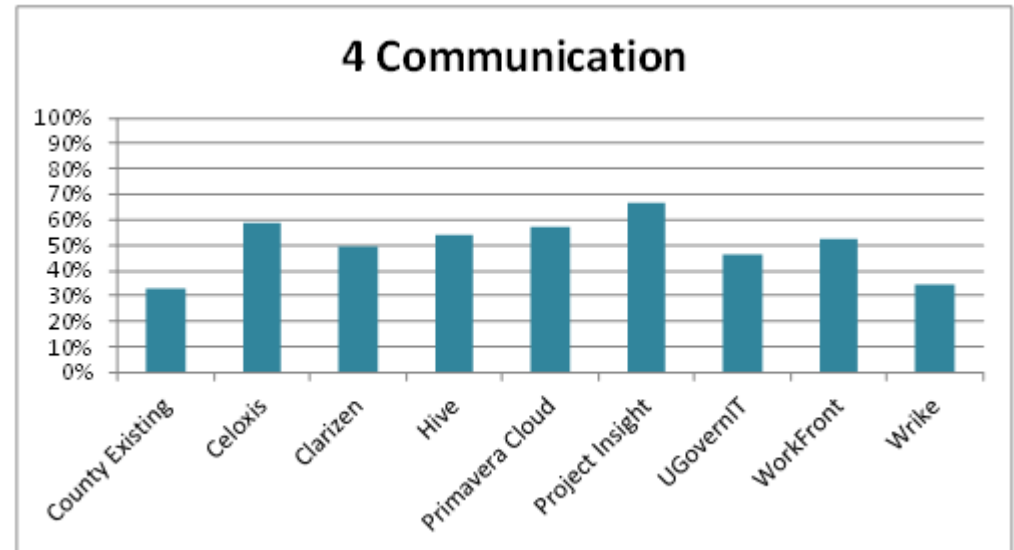


Collaboration Management

1. Hive 95%
2. Project Insight 86%
3. WorkFront 86%
4. Clarizen 84%
5. Wrike 77%
6. Celoxis 58%
7. Primavera Cloud 46%
8. County Existing 37%
9. UGovernIT 21%

Communication Management

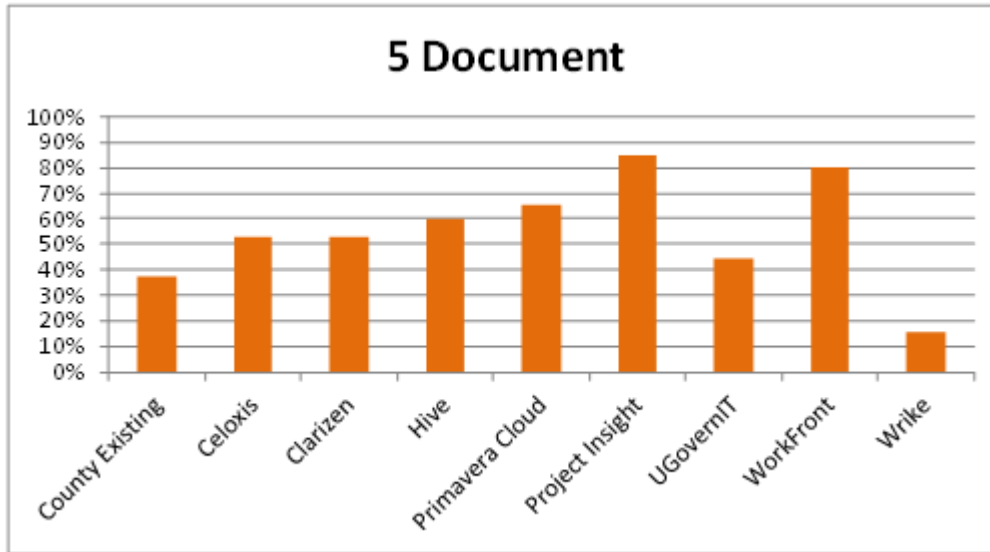
1. Project Insight 67%
2. Celoxis 59%
3. Primavera Cloud 57%
4. Hive 54%
5. WorkFront 52%
6. Clarizen 49%
7. UGovernIT 46%
8. Wrike 35%
9. County Existing 33%



Analysis: Document & Resource

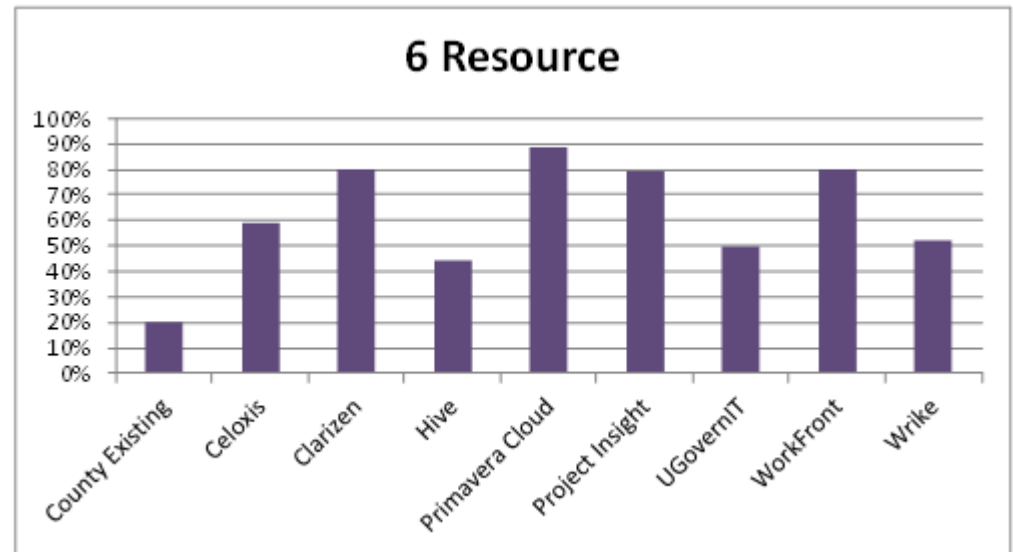
Document Management

1. Project Insight	85%
2. Celoxis	53%
3. Primavera Cloud	65%
4. Hive	60%
5. WorkFront	81%
6. Clarizen	53%
7. UGovernIT	44%
8. Wrike	15%
9. County Existing	38%

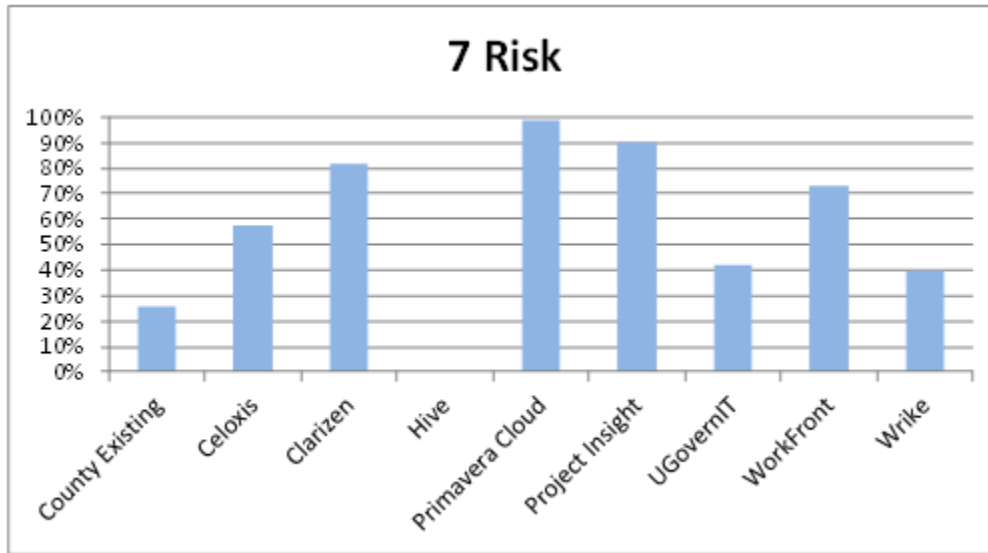


Resource Management

1. Primavera Cloud	89%
2. Clarizen	80%
3. WorkFront	80%
4. Project Insight	79%
5. Celoxis	59%
6. Wrike	52%
7. UGovernIT	50%
8. Hive	44%
9. County Existing	21%



Analysis: Risk & Issue

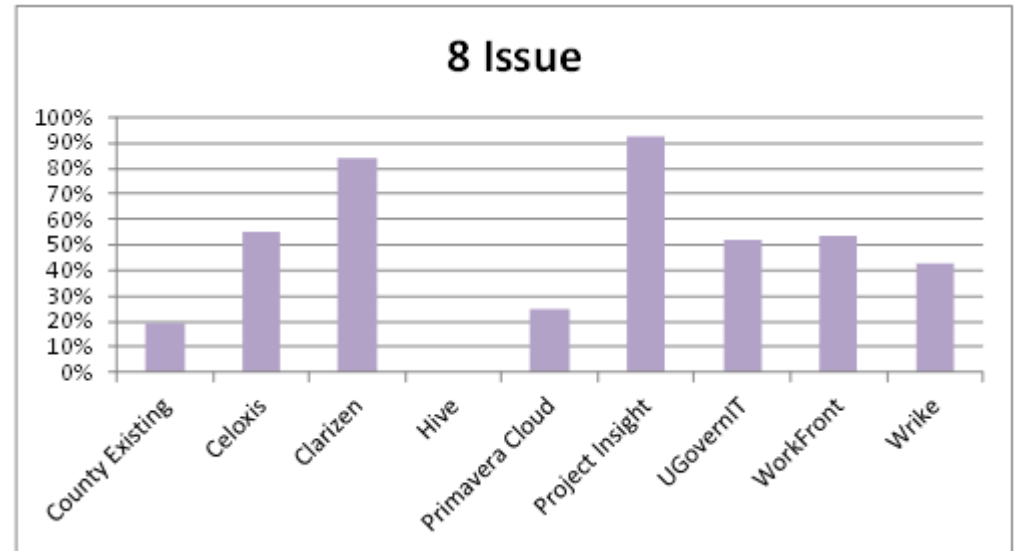


Risk Management

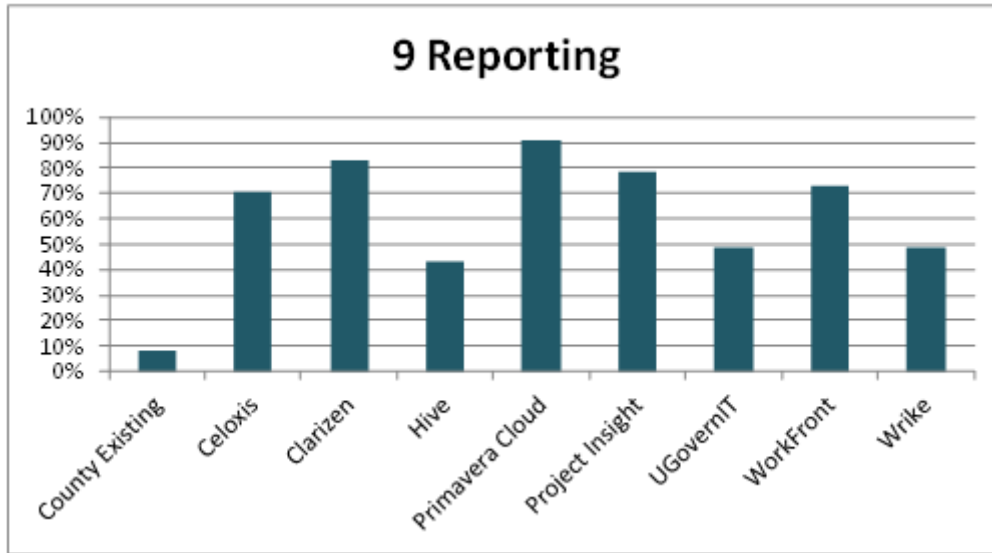
1. Primavera Cloud 99%
2. Project Insight 90%
3. Clarizen 82%
4. WorkFront 73%
5. Celoxis 58%
6. UGovernIT 42%
7. Wrike 39%
8. County Existing 26%
9. Hive 0%

Issue Management

1. Project Insight 93%
2. Clarizen 84%
3. Celoxis 55%
4. WorkFront 54%
5. UGovernIT 52%
6. Wrike 42%
7. Primavera Cloud 25%
8. County Existing 20%
9. Hive 0%



Analysis: Reporting & Budget

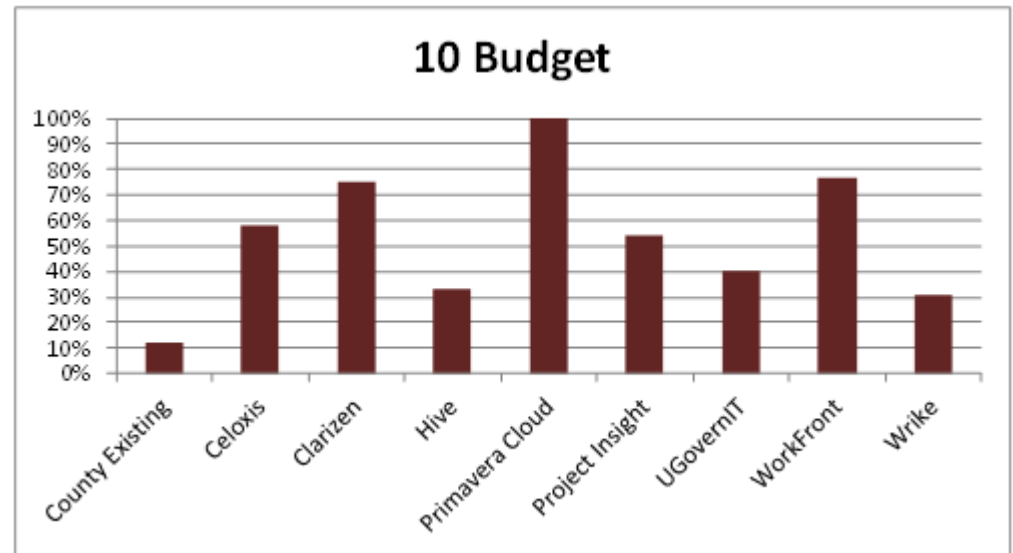


Reporting

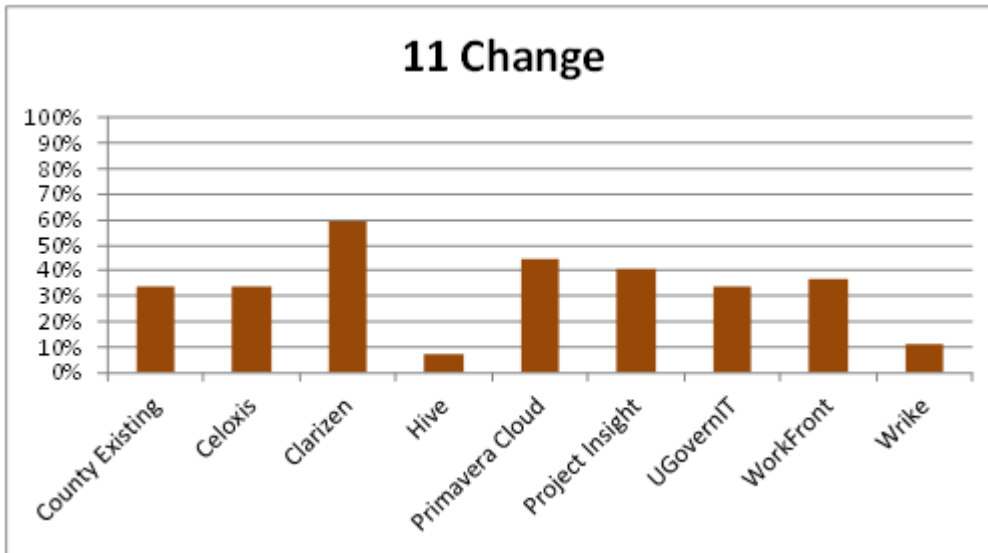
1. Primavera Cloud 91%
2. Clarizen 83%
3. Project Insight 78%
4. WorkFront 73%
5. Celoxis 70%
6. UGovernIT 49%
7. Wrike 49%
8. Hive 43%
9. County Existing 9%

Budget Management

1. Primavera Cloud 100%
2. WorkFront 76%
3. Clarizen 75%
4. Celoxis 58%
5. Project Insight 54%
6. UGovernIT 40%
7. Hive 33%
8. Wrike 31%
9. County Existing 13%



Analysis: Change & Portfolio

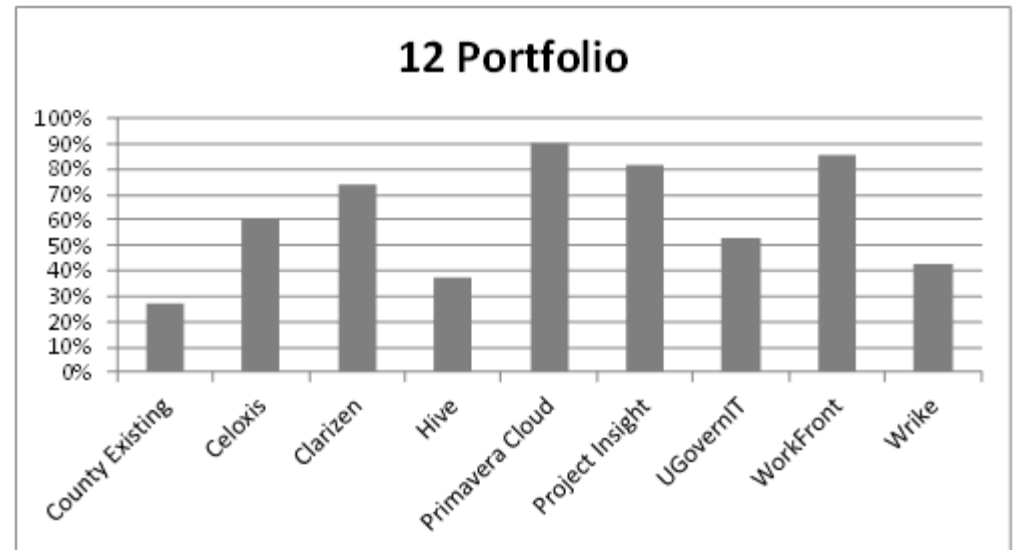


Change Management

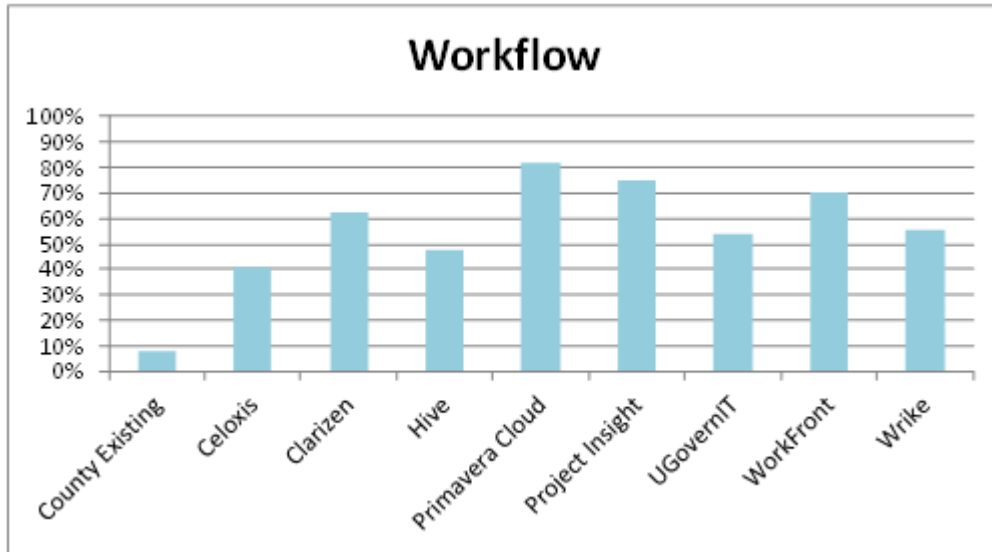
1. Clarizen 59%
2. Primavera Cloud 44%
3. Project Insight 41%
4. WorkFront 37%
5. Celoxis 33%
6. UGovernmentIT 33%
7. County Existing 33%
8. Wrike 11%
9. Hive 7%

Portfolio Management

1. Primavera Cloud 90%
2. WorkFront 86%
3. Project Insight 81%
4. Clarizen 74%
5. Celoxis 61%
6. UGovernmentIT 53%
7. Wrike 43%
8. Hive 37%
9. County Existing 27%



Analysis: Workflow



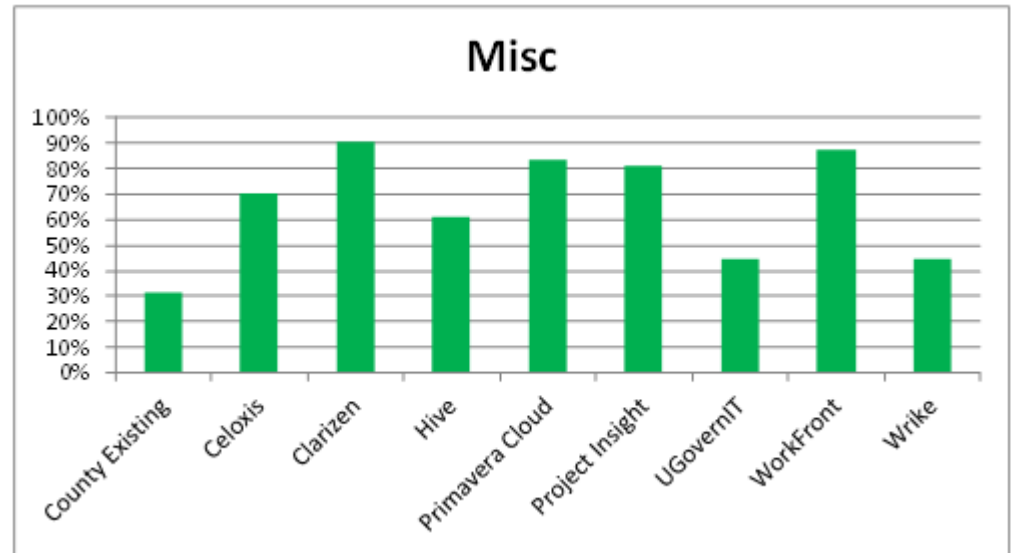
Workflow

1. Primavera Cloud 82%
2. Project Insight 75%
3. WorkFront 70%
4. Clarizen 62%
5. Wrike 56%
6. UGovernmentIT 54%
7. Hive 48%
8. Celoxis 41%
9. County Existing 8%

Analysis: Miscellaneous

Miscellaneous

1. Clarizen	90%
2. WorkFront	88%
3. Primavera Cloud	84%
4. Project Insight	81%
5. Celoxis	70%
6. Hive	61%
7. Wrike	45%
8. UGovernIT	44%
9. County Existing	32%



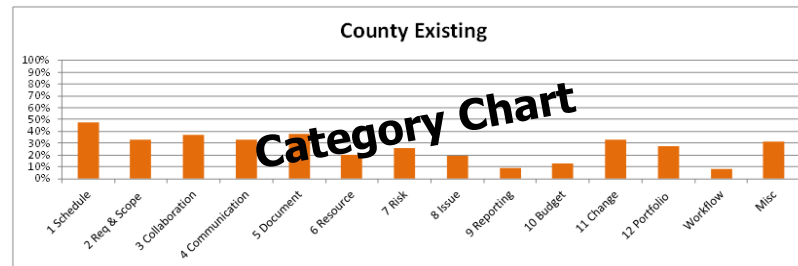
- Miscellaneous Score is based on:
 - Ability to create User Defined Fields
 - Import and Export capabilities
 - Single Sign On option
 - Project-level and Role Based Security
 - Integration and Mobile options

Detailed Analysis

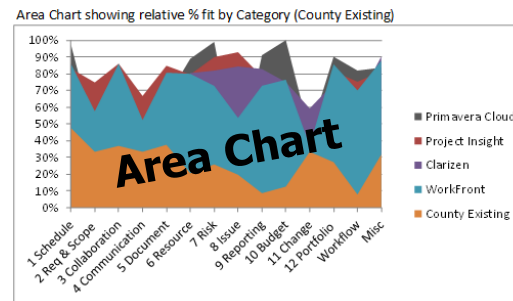
- Top 4 solutions by Percent Score:
 1. Project Insight (76%)
 2. Oracle Primavera Cloud (72%)
 3. Clarizen (72%)
 4. Workfront (71%)
- Includes County existing tools (27%) for comparison
- Review each solution:
 - Graphical results by Category
 - Strengths and Weaknesses
 - Costs - Estimate based on response
 - Licensing
 - Initial Implementation / Stand Up Costs
 - Annual Recurring Costs

Analysis: Top 4 Applications Reviews

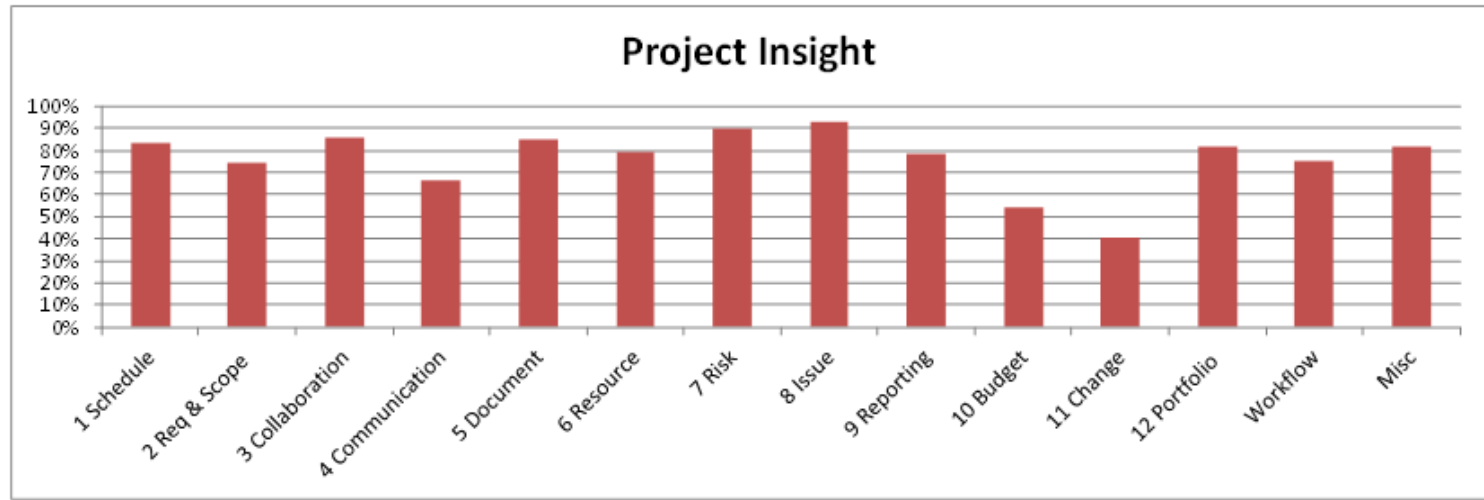
- Charts in following slides will summarize information by Category
 - Category Chart shows how the specific application did in each area (by % Score)



- Area Chart shows comparison to other tools. Front chart will be the application being reviewed. Peaks visible above are where other applications scored higher (by % Score)



Analysis: Project Insight



Area Chart showing relative % fit by Category (Project Insight)

Category	Project Insight	Primavera Cloud	County Existing	WorkFront	Clarizen
1 Schedule	83%	17%	0%	0%	0%
2 Req & Scope	75%	25%	0%	0%	0%
3 Collaboration	85%	15%	0%	0%	0%
4 Communication	65%	35%	0%	0%	0%
5 Document	85%	15%	0%	0%	0%
6 Resource	80%	20%	0%	0%	0%
7 Risk	88%	12%	0%	0%	0%
8 Issue	92%	8%	0%	0%	0%
9 Reporting	80%	20%	0%	0%	0%
10 Budget	55%	45%	0%	0%	0%
11 Change	42%	58%	0%	0%	0%
12 Portfolio	82%	18%	0%	0%	0%
Workflow	75%	25%	0%	0%	0%
Misc	82%	18%	0%	0%	0%

Analysis: Project Insight

- Strengths
 - Portfolio: Project Intake with scorecards and prioritization
 - Scheduling: Assignment board allows activities to easily be moved between resources
 - Resource: Project level allocation before activity level detail
 - Collaboration: Discussions and comments; Interface to MS Teams and Slack; Can update tasks through MS Teams
 - Document: Drag/Drop from folders; Add on PageProof provides digital proofing, markups, etc. (separate tool)
- Weaknesses
 - Budget: More like capabilities planned
 - Updates from Resource change the Schedule immediately

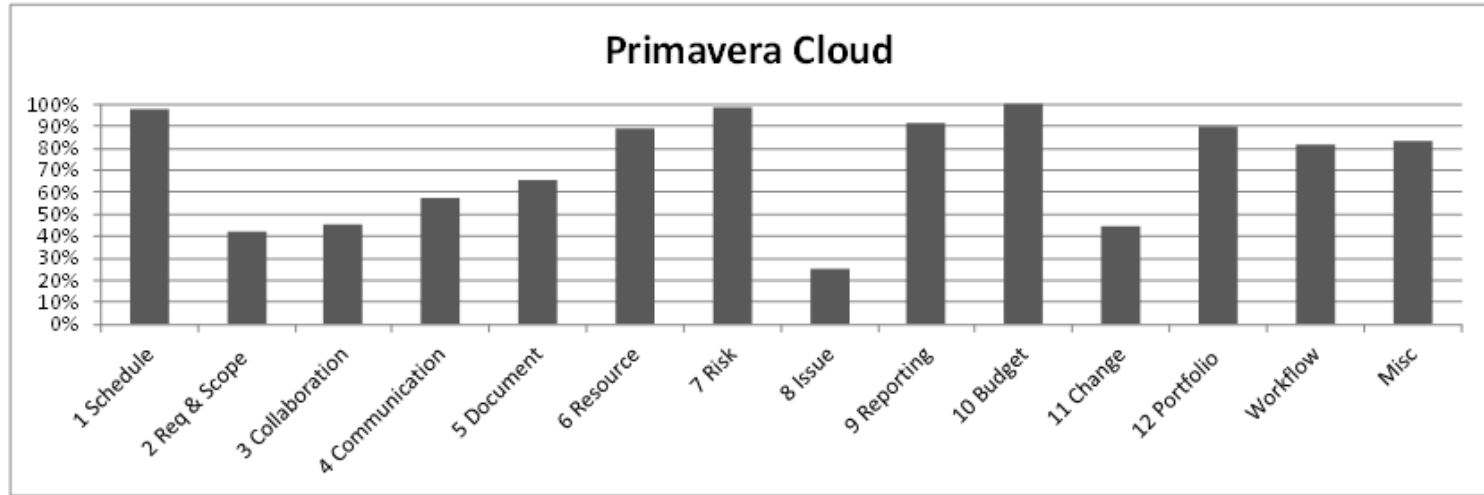
Analysis: Project Insight

- Platform
 - SaaS, On-Premise, and Dedicated Instance version available
- Technical
 - SOC2/SSAE16 Security Audit performed
 - Backups depend on platform
- Sustainability
 - Company headquarters in Costa Mesa, CA
 - Metafuse incorporated in 1997, Project Insight launched 2002
 - Current version at 20.5 with updates every 2-3 weeks
- Accessibility Standards
 - No additional information available

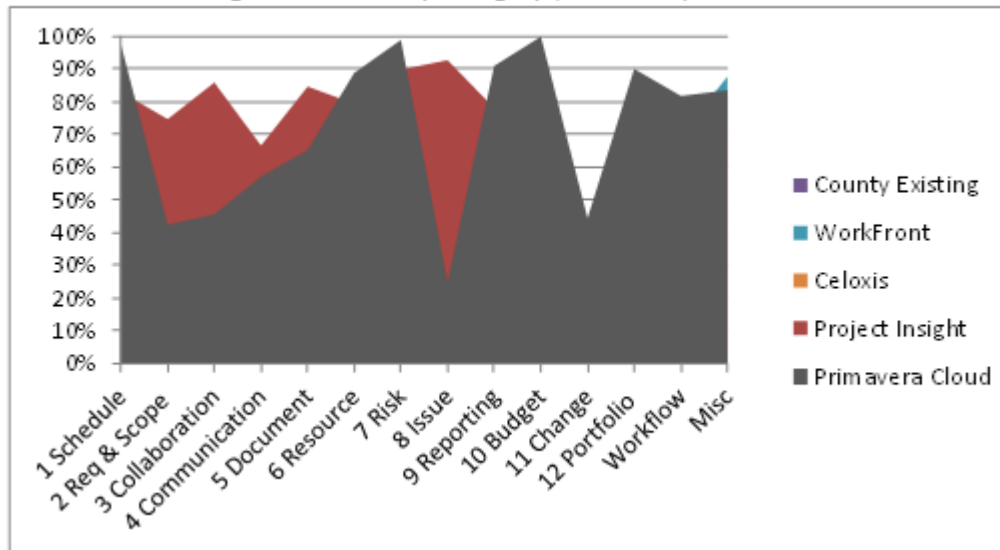
Analysis: Project Insight

- Costs based on estimated user base
 - Licenses: \$56,000
 - Implementation Costs: \$50,000
(Business Process Consulting, Training, Report & Template Building, Customization, Integrations)
 - Ongoing maintenance and support: Cost of licenses
- Cooperative Purchasing Agreement
 - No formal government purchase program exists but would be willing to consider
- Implementation Effort
 - Between 60-120 days from contract

Analysis: Primavera Cloud



Area Chart showing relative % fit by Category (Primavera)



Analysis: Primavera Cloud

- Strengths
 - Portfolio: Intake with scorecard and rankings; Custom groupings of projects; Scenario analysis
 - Scheduling: 19 Point Health Check; Schedule comparison; Go back in time and capture snapshot of data
 - Resource: Project Managers can review and adjust updates from Resources before they impact the schedule
 - Reporting: Dashboards and Analytics available within application; Customizable
 - Workflow: Easy to create using graphical interface; Conditional Routing; Custom forms
 - Risk: Includes Risk Mitigation Planning with action steps and tracking
 - Budget: Strong costing capabilities

Analysis: Primavera Cloud

- Weaknesses
 - Agile: Focus is mainly Waterfall, that could be Iterative for Sprints, but lacks ability to create backlogs, stories, etc. and easily reprioritize them.
 - Collaboration: Does provide feedback on activities and discussions at the activity level, but does not interface with any collaborative tools
 - Auditing: Tracks comments through the individual that made them rather than against the object discussed
 - Issues: Currently little more than an issues log

Analysis: Primavera Cloud

- Platform
 - Multi-tenant Cloud-based application hosted in Ashburn, VA
- Technical
 - Data is encrypted in transit and at rest
 - ISO/IEC 27001 & 27002 Code of Practice. Assessed annually.
 - Target system availability is 99.5%
 - Backups made for Oracle's purposes in the event of an incident, not typically to restore data lost as a result of client actions
- Sustainability
 - Company founded in 1977
 - Updates with regular release throughout the year
 - Monthly / quarterly maintenance and regular patch sets

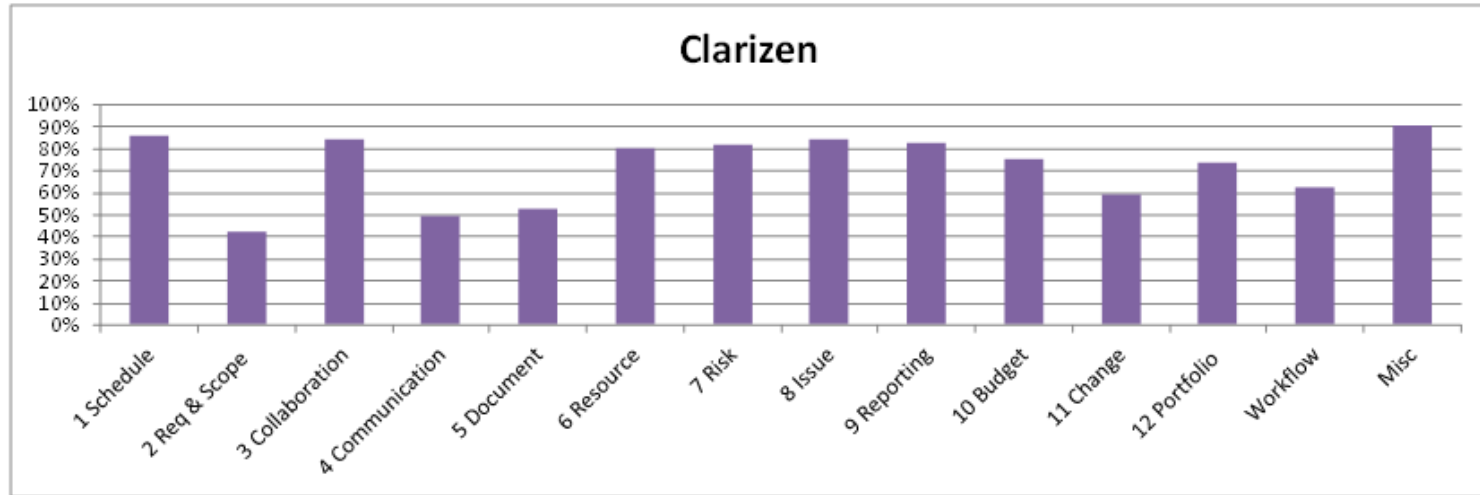
Analysis: Primavera Cloud

- Accessibility Standards
 - Oracle products are tested for accessibility using a variety of techniques including automated tools, expert heuristic review, visual inspection, manual operation, and testing with various AT by both disabled and non-disabled users. We report the outcome of that testing using the Voluntary Product Accessibility Template (VPAT).
 - The most recent VPAT for Oracle Primavera Cloud is for version 20.1, available at:
<https://www.oracle.com/corporate/accessibility/templates/t2-9655.html>

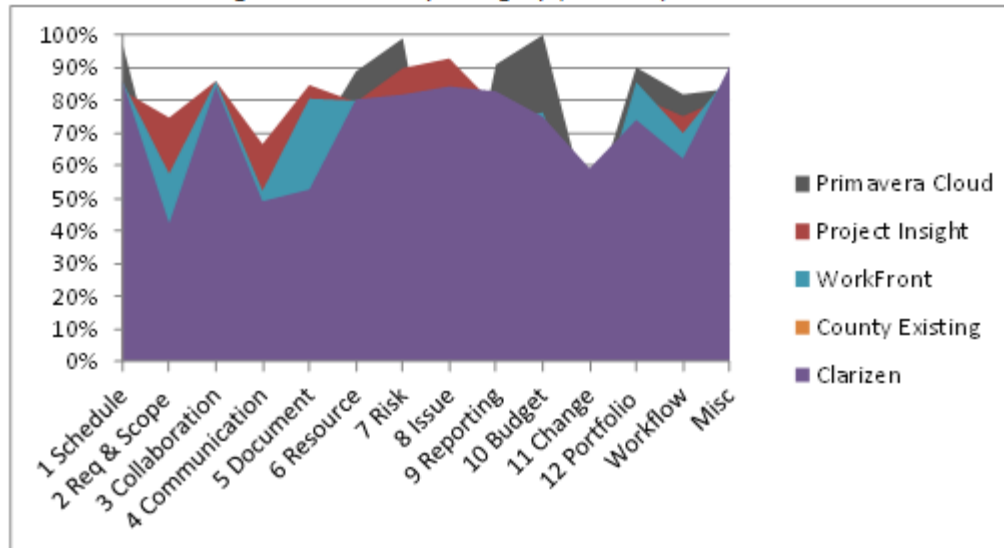
Analysis: Primavera Cloud

- Costs based on expected user base
 - Licenses: \$87,360
 - Implementation Costs: \$65,000 - \$85,000
(Review, Adjustments, Testing, Deployment and Training)
 - Ongoing maintenance and support: Cost of licenses
- Cooperative Purchasing Agreement
 - Mythics Maricopa Contract (formerly US Communities)
 - Lead Agency: Maricopa County
- Implementation Effort
 - 8 to 12 weeks
 - 25 to 35 person days of participation

Analysis: Clarizen



Area Chart showing relative % fit by Category (Clarizen)



Analysis: Clarizen

- Strengths
 - Scheduling: Phase gates with approvals
 - Resource: Assign based on Role while seeing all Resource availability
 - Collaboration: Clarizen Chatbot for MS Teams allows query of information and updates directly from MS Team; Approvals through email; Discussions
 - Reporting: Slide Printer can generate a PPT from dashboards; Create interactive view of Dashboard and send to a non-Clarizen user or be embed in a web page
 - Dashboards: Very configurable, drag and size portlets

Analysis: Clarizen

- Weaknesses
 - Use of Milestones as WBS levels
 - Documentation: Limited security; Need ZYFlow for additional capabilities
 - Workflow: Buildable, but geared toward reusing same workflow across multiple forms/request; Doesn't seem flexible
 - Updates from Resource change the Schedule immediately

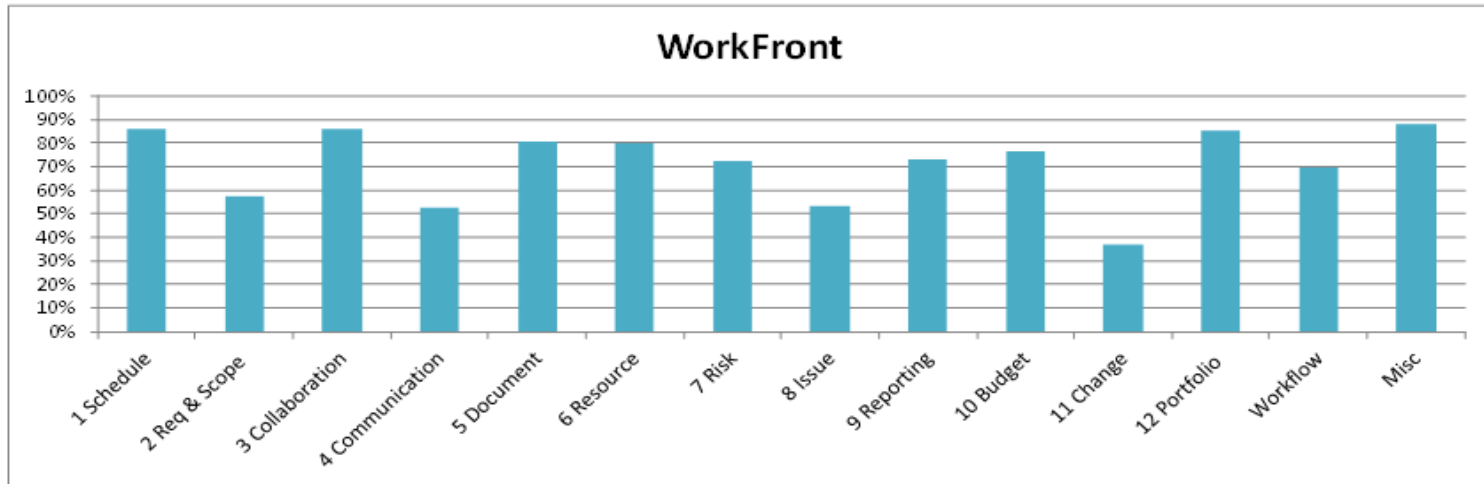
Analysis: Clarizen

- Platform
 - SaaS only with dedicated environment
- Technical
 - Data center is in California with Disaster Recovery site in NJ
 - Global update of 99.99%
- Sustainability
 - Company originated in 2005
 - Ongoing updates
- Accessibility Standards
 - No specific actions taken to be compliant

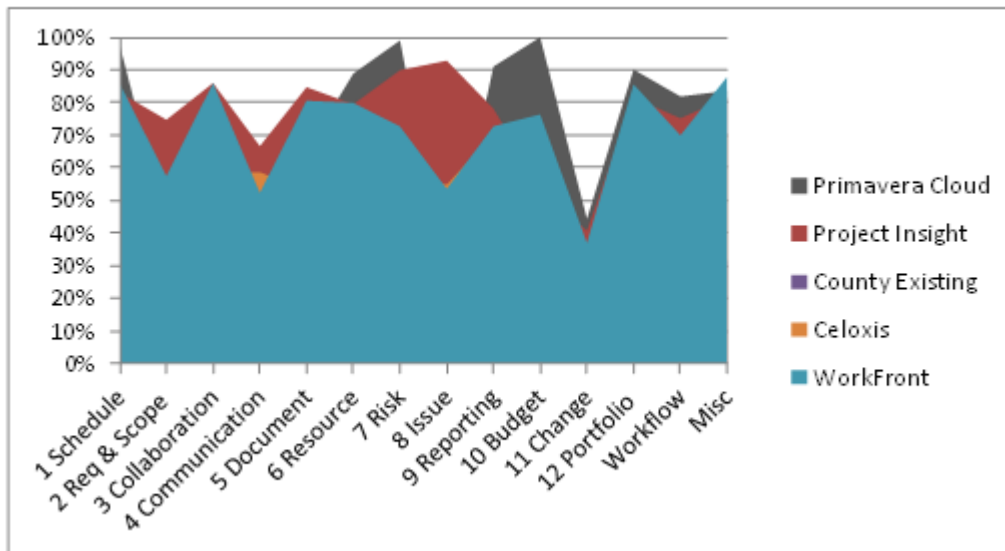
Analysis: Clarizen

- Costs based on expected user base
 - Enterprise Version: 1 Custom Unit
 - Unlimited Version: Up to 5 Custom Units
 - Licenses: \$172,800 (Enterprise)
\$230,400 (Unlimited)
 - Implementation Costs: \$25,000 - \$50,000
(SOW will be developed to determine work to be done. Estimate 100 – 200 hours @ \$250)
 - Ongoing maintenance and support: Cost of Licenses
- Cooperative Purchasing Agreement
 - No purchasing agreement
- Implementation Effort
 - 8 to 10 Weeks

Analysis: Workfront



Area Chart showing relative % fit by Category (WorkFront)



Analysis: Workfront

- Strengths
 - Known entity in Orange County; Other Departments use it
 - Data Import: “Kick Start” enables loading of existing data
 - Portfolio: Can convert a Request into a Project
 - Collaboration: Interface with MS Teams and personal calendars; Discussions
 - Documents: View and mark up 150 different document types
 - Agile: Burndown log; Story Boards
- Weaknesses
 - Resources: Updates change the Schedule immediately
 - Costs: Focus was labor and expense, can’t track Material or Non-Labor separately

Analysis: Workfront

- Platform
 - Multi-tenant Cloud-based application
- Technical
 - Data encrypted in transit and at rest
 - ISO 27001, 27017, and 27018 certified
 - Standards: ASEPA, NIST, SANS, OWASP. Last assessed July, 2019
 - Continuous backups with fail over
- Sustainability
 - Company originated in 2001, SaaS offering launched in 2006
 - Current version 2020.2
 - New releases quarterly with patches as needed

Analysis: Workfront

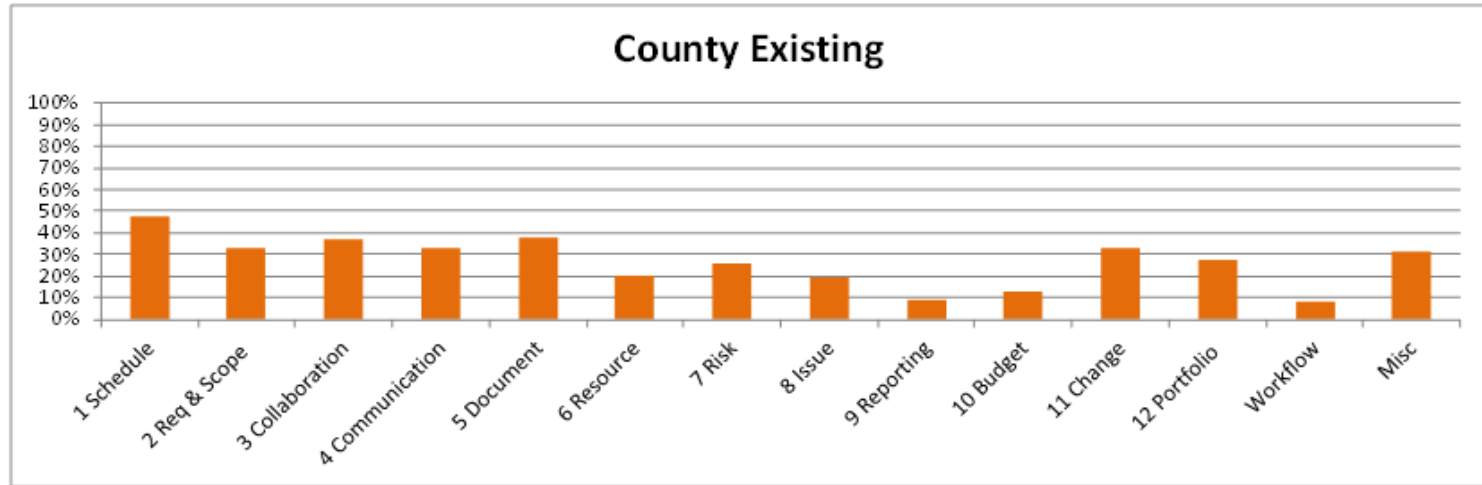
- Accessibility Standards
 - Workfront complies with many of the standards and requirements outlined in Web Content Accessibility Guidelines (WCAG) 2.0 and Section 508 of the Rehabilitation Act
 - Workfront continually strives to improve its user interface for all types of users. Many of our releases are focused primarily on usability enhancements, many of which will improve the ease of use for those with disabilities. Because Section 508 and similar accessibility regulations are generally focused on the government entity's general compliance and less pertinent to specific vendors, Workfront recommends that its clients perform their own evaluations based on their specific environment and usage.

Analysis: Workfront

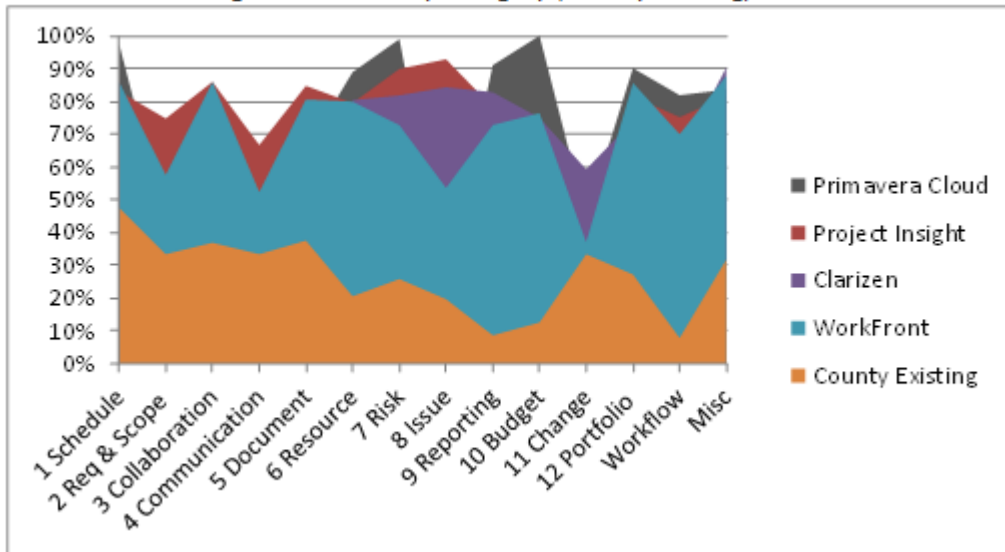
- Costs based on expected user base
 - Business version: 10 Departments and Portfolio Optimizer & Scorecards
 - Professional version: 1 Department
 - Licenses: \$148,480 Business
\$128,760 Professional
 - Implementation Costs: \$50,000 - \$70,000
 - Ongoing maintenance and support: Cost of licenses
(Recommend \$10-20K every 1-2 years for optimization)
- Cooperative Purchasing Agreement
 - Workfront is available on the GSA schedule for purchase.
GSA schedule #: GS-35F-0571T
- Implementation Effort
 - 1 to 3 weeks



Analysis: County Existing Tools



Area Chart showing relative % fit by Category (County Existing)



Analysis: County Existing Tools

- Strengths
 - Existing, known applications
 - Flexibility of Excel, Word, SharePoint allows PMs to customize in order to delivery what they need
- Weaknesses
 - Lacks a strong, single source for project management data
 - Difficult and time consuming to export and combine project information for analysis and reporting purposes
 - Multiple tools used to accomplish work leads to data re-entry, multiple locations for information, and potential data discrepancies
 - No single source of truth for all projects
 - No automated workflow capabilities for routing information and obtaining approvals

Analysis: County Existing Tools

- Platform
 - Mainly SharePoint, MS Project (stand alone), Excel/Word
 - Workfront is used by a couple of Agencies
- Technical
 - Stand alone applications run on individual's computers
 - SharePoint security does not have granular settings to limit who has access to which items within a site
- Sustainability
 - Individual applications have ongoing support indefinitely
- Costs
 - No additional cost

Cost Comparison

- Estimated User Base:
 - 30 Project Managers
 - 30 Resource Managers
 - 10 Portfolio Managers
 - 20 Executives
 - 200 Resources
- Pricing is based on information supplied by vendor
- Vendors have stated that additional discounts may be available
- Refer to individual solution's Analysis slides for more details about the costs

Cost Comparison

Solution	License/Yr	Implementation	On-Going/Yr
Celoxis SaaS	\$ 87,000	\$ 16,000	\$ 87,000
Celoxis On-Prem	130,500	16,000	43,065
Clarizen Enterprise	172,800	25,000	172,800
Clarizen Unlimited (#3)	230,400	50,000	230,400
Hive	61,200	100,000	61,200
Primavera Cloud (#2)	87,360	65 - 85,000	87,360
Project Insight (#1)	56,000	50,000	56,000
UGovernIT	36 - 48,000	10 - 25,000	36 - 48,000
Workfront Business	148,480	50 - 70,000	148,480
Workfront Professional (#4)	128,760	50 - 70,000	128,760
Wrike Business	46,224	8 - 12,000	46,224
Wrike Enterprise	68,040	8 - 12,000	68,040



Conclusions

- Countywide Survey and Interviews indicated that the current tools are not effective and need improvement
 - See Survey Findings PowerPoint
- Current Project Management tools do not effectively work for the County
 - Outlined in slides 14 Current State Findings and 15: Project Management Findings
- The tools used for Portfolio Management are not adequate to manage the number and size of existing projects
 - Outlined in slide 16: Portfolio Management Findings

Conclusions

- Future Vision addresses weakness identified in Current State
 - Outlined in slides 17 - 18: Future Vision and 19 - 22: Current to Future Contrast
- Requirements identified and vetted through the assessment process provide a strong basis for future tool procurement
- Assessment of PM & PPM Tools identified top 4 based on product review and demonstration
 - Project Insight, Primavera Cloud, Clarizen, Workfront
 - Variance between the top 4 solutions is only 5%
 - Any of the top 4 solutions would greatly improve project and portfolio management capabilities
 - Ultimate select should focus on the Categories that matter most to the County

Final Word

- Projects are being completed in spite of the tools used
- Implementing Project Management tools that manage and report in the system will reduce rework and inaccuracy from manually updating SharePoint
- Establishing a Portfolio capable system will vastly increase the County's ability to view and analyze project information
- Providing Resource Management capabilities will enable OCIT to determine the right number and skill set of resources needed to effectively and efficiently deliver future projects
- Centralizing the PM & PPM data will increase accuracy and timeliness of reports; reduce the effort to create them; and enable more in-depth analysis