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
    o Director of Operations
    o Network Manager
    o PMO Manager
    o PMO Project / Program Manager (5)
    o 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

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

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Effective</th>
<th>Sufficient</th>
<th>Needs Improvement</th>
<th>N/A or No Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Schedule Management</td>
<td>2</td>
<td>10</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>2. Requirements &amp; Scope</td>
<td>0</td>
<td>12</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>3. Project Team Collaboration</td>
<td>5</td>
<td>10</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4. Communication Management</td>
<td>1</td>
<td>9</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>5. Document Management</td>
<td>1</td>
<td>12</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>6. Resource Management</td>
<td>0</td>
<td>6</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>7. Risk Management</td>
<td>0</td>
<td>9</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>8. Issue Management</td>
<td>0</td>
<td>11</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>9. Reporting</td>
<td>0</td>
<td>6</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>10. Budget Management</td>
<td>0</td>
<td>6</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>11. Change Management</td>
<td>1</td>
<td>8</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>12. Portfolio Management</td>
<td>0</td>
<td>3</td>
<td>7</td>
<td>4</td>
</tr>
</tbody>
</table>

*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
• 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

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

<table>
<thead>
<tr>
<th></th>
<th>Current State</th>
<th>Future Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td><strong>Communication</strong> external to the project information through email, MS Teams, Skype and other tools</td>
<td><strong>Communication</strong> that retains meeting agendas and minutes, status reports, and feedback with the project or artifact</td>
</tr>
<tr>
<td>5</td>
<td><strong>Document Management</strong> 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.</td>
<td><strong>Document Management</strong> with granular security rights; storage and access to documents across projects; and document review, markup, feedback, and approval workflow</td>
</tr>
<tr>
<td>6</td>
<td><strong>Resource Management</strong> 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.</td>
<td><strong>Resource Management</strong> 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</td>
</tr>
</tbody>
</table>
## Current to Future Contrast

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

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

Planview (2019 Garner 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)

• 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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Application</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Project Insight</td>
<td>76%</td>
</tr>
<tr>
<td>2.</td>
<td>Oracle Primavera Cloud</td>
<td>72%</td>
</tr>
<tr>
<td>3.</td>
<td>Clarizen</td>
<td>72%</td>
</tr>
<tr>
<td>4.</td>
<td>Workfront</td>
<td>71%</td>
</tr>
<tr>
<td>5.</td>
<td>Celoxis</td>
<td>56%</td>
</tr>
<tr>
<td>6.</td>
<td>UGovernIT</td>
<td>44%</td>
</tr>
<tr>
<td>7.</td>
<td>Wrike</td>
<td>43%</td>
</tr>
<tr>
<td>8.</td>
<td>Hive</td>
<td>41%</td>
</tr>
</tbody>
</table>

% 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

**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%

**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%
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

**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%

**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%
Analysis: Change & Portfolio

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

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

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

**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

<table>
<thead>
<tr>
<th>Software</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarizen</td>
<td>90%</td>
</tr>
<tr>
<td>WorkFront</td>
<td>88%</td>
</tr>
<tr>
<td>Primavera Cloud</td>
<td>84%</td>
</tr>
<tr>
<td>Project Insight</td>
<td>81%</td>
</tr>
<tr>
<td>Celoxis</td>
<td>70%</td>
</tr>
<tr>
<td>Hive</td>
<td>61%</td>
</tr>
<tr>
<td>Wrike</td>
<td>45%</td>
</tr>
<tr>
<td>UGovernIT</td>
<td>44%</td>
</tr>
<tr>
<td>County Existing</td>
<td>32%</td>
</tr>
</tbody>
</table>
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
    o Licensing
    o Initial Implementation / Stand Up Costs
    o 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

Project Insight

Area Chart showing relative % fit by Category (Project Insight)
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
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 hosed in Ashburn, VA

• Technical
  – Data is encrypted in transit and at rest
  – 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

![Bar chart showing Workfront categories](image1)

![Area chart showing relative fit by category](image2)
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

County Existing

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 deliver 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

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

• 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