GOVERNMENT OF JAMAICA
PUBLIC INVESTMENT MANAGEMENT SYSTEM

REQUEST FOR INFORMATION

for

PUBLIC INVESTMENT MANAGEMENT INFORMATION SYSTEM

Prepared by

Public Investment Management Secretariat
08 September 2016

Revision History

01 September 2016	1.01	First Draft	

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1. **Introduction**

The Government of Jamaica, under the World Bank funded Strategic Public Sector Transformation Project (SPSTP), is strengthening its public investment management system as part of a comprehensive public financial management reform agenda. This reform has seen the incorporation of public investment management as part of an enhanced fiscal governance framework.

The Financial Administration and Audit (FAA) Act was amended in March 2014 to enshrine the new public investment management system in law. The FAA Act 2014 sets out the elements of the Public Investment Management System (PIMS) which seeks to create a common framework for the preparation, appraisal, approval and management of all public investments in Jamaica, irrespective of the source of funding or procurement and implementation modalities. A key element of this system is the Public Sector Investment Programme (PSIP) - a rolling 5 year plan of Cabinet approved public investment projects.

The objectives of the PIMS are to:
   a) Promote growth and development and encourage capital formation for future investment
   b) Maximize efficiency of public investment through better selection and management of investment expenditure
   c) Improve the quality of social and economic infrastructure in the country.

The PIMS is an integrated approach to managing the public investment portfolio of projects, which is:
   - **Extensive**: extends across all public entities and sectors
   - **Inclusive:** includes all type of public sector expenditures (actuals and contingencies)
   - **Complete:** covers all steps and phases that a project has to complete through its productive life, including the interaction with other administrative systems (e.g. budget, treasury, procurement, human resources)
   - **Strategic:** all projects will be selected and oriented to add value to a larger development purpose.

Organization Overview
The Public Investment Management Secretariat (PIMSEC) is the unit responsible for the assessment of all project proposals presented for screening and appraisal, and provides technical support and advice to the PIMC to facilitate its decision making. Every public investment proposal/ project must first be submitted to the PIMSEC, regardless of whether it is intended to be financed by a grant, loan, and other Government resources or by way of a Public–Private Partnership.

Purpose of Document
The intent of this Request for Information (RFI) is to gather information for the purpose of guiding the effort to select an appropriate web-enabled computer system that will serve as the repository of information on all public investment projects (central government, public bodies and public private partnerships), at all stages of the project cycle (concept, feasibility, approval, implementation and evaluation) to facilitate

progress and performance tracking. This RFI process is being used to canvas targeted vendors in the industry for one or more of the following purposes:

- Acquiring general information about the capabilities of major potential suppliers;
- Soliciting assistance in identifying potential technology solutions.

Generally speaking, the RFI process will help to determine which Request for Proposals (RFPs) will be issued, or influence the way in which a particular RFP will be constructed.

Information Being Requested
The information being requested at this stage consists of:
a) company profiles of potential suppliers;
b) summary of their product offerings and
c) high-level pricing information for products and services.

2. Instructions for Responding to this RFI

Who May Respond
Only responses from the specific recipient companies (or their subsidiaries) of this RFI are requested; when and if a subsequent Request For Proposal (RFP) in this area is issued, selected companies from the RFI recipient listing will be eligible to respond with detailed specifications.

How to Respond
One electronic copy in machine-readable format (*Microsoft© Word* format) should be sent to:

Mr. Douglas Levermore
Executive Director
Public Investment Management Secretariat
℅ Planning Institute of Jamaica
16 Oxford Road
Kingston 5, Jamaica, W.I.
Tel: (876) 906-4463/4
DID: (876) 935-5116
Cell: (876) 838-8208
Email: DLevermore@pioj.gov.jm

*Responses to this **RFI** must be received by email by no later than **4:00PM Eastern Standard Time** on **Friday, 30 September 2016**.*

RFI Response Contact
Companies responding to this RFI shall designate a single contact within that company for receipt of all subsequent information regarding this RFI. The name of this contact will be made available to PIMSEC.

Format of RFI Responses

The following outline is offered to assist in the development of your response. You should include:

1. A cover letter which should include a brief summary of your response, such as indicating to which areas you are responding and if supporting documentation is included in your response.
2. The response itself (soft copy), covering any or all of the areas of information requested by this RFI.
3. If required, a glossary that explains terminology used in your response.

Although response size is not limited, you are asked to consider the fact that a limited time schedule to review these responses has been set. In order to assure that your response receives the attention it deserves, you are asked to consider limiting the size of your response (not counting any supporting documentation) to approximately **ten (10) pages** beyond the size of the turnaround document. If you consider supporting documentation to be necessary, please indicate which portions of the supporting documentation are relevant to this RFI.

Distribution of RFI Responses

Copies of all documentation submitted in response to this RFI will be made available to the PIMIS Review Team.

Reimbursement

Neither the Government of Jamaica, PIMSEC nor any other agent of the Government will reimburse submitters for any costs incurred in conjunction with their responses to this RFI.

Questions Regarding this RFI

Any technical questions or questions regarding the response process relating to this RFI should be sent in writing to:

> **Mr. Douglas Levermore**
> Executive Director
> Public Investment Management Secretariat
> ℅ Planning Institute of Jamaica
> 16 Oxford Road
> Kingston 5, Jamaica, W.I.
> Tel: (876) 906-4463/4
> DID: (876) 935-5116
> Cell: (876) 838-8208
> Email: DLevermore@pioj.gov.jm

Review Process

This RFI is issued with the intent to survey potential technology partners in order to obtain information that provides guidance which will be used in the preparation of RFPs. PIMSEC's RFI Review Team will assess responses to this RFI.

Clarification

To fully comprehend the information contained within a response to this RFI, PIMSEC's RFI Review Team may seek further clarification on that response. This clarification may be requested in the form of brief verbal communication by telephone; written communication; electronic communication; or a presentation of the response to a meeting of PIMSEC's RFI Review Team.

RFI Response Presentations and Demonstrations

RFI Respondents may be invited to present their response to the PIMSEC RFI Review Team. The purpose of this presentation would be to seek clarification of information contained within the response (as noted above); to further explore issues raised; or to further meet the goals of the RFI.

Notes:
1. Neither the Government of Jamaica nor PIMSEC assumes any contractual obligations nor are any intended by:
   - Issuing this RFI, receiving, accepting, and evaluating the responses, and
   - making a preliminary evaluation.

2. Documents submitted may be reviewed and evaluated by any persons at the discretion of PIMSEC, including their IT resources and/or their independent consultants.

3. PIMSEC reserves the right to accept or reject any or all responses. Additionally, PIMSEC reserves the right to cancel the RFI at any time throughout the duration of the published schedule.

2. RFI Questionnaire

General Information		
1.	Name of organization and type of legal entity (private, public, corporation):	
2.	Address:	
3.	Company Representative:	
4.	Representative's Position in Organization:	
5.	Mailing address of Company Representative:	
6.	Telephone number:	
7.	Fax number:	
8.	E-mail address:	
9.	Web site:	
10.	Name of parent company (if applicable):	

Please complete the following:

Rates for Consulting

	Hourly Rate (US$)	Comment
Consulting		
Business Analysis		
Project Management		
Systems Analysis		

Programming		
Training		
Telephone Support		
Other		

		Check as Appropriate
	Software Details	
1	What Database Management System does your software use?	
	a. ORACLE	☐
	b. MS SQL Server	☐
	b.DB2	☐
	c. Other (Please Specify)	☐
2	What Operating System(s) are required for the software to run?	
	Client **Server**	
	a. OS/400 (Please Specify Version)	☐
	b. WINDOWS (Please Specify Version)	☐
	c. LINUX (Please Specify Version)	☐
	d. WINDOWS (Please Specify Version)	☐
	e. Other OS (Please Specify Name/Version)	☐
3	What architecture does your software use?	
	a. Client/Server	☐
	d. Web-based	☐
	e. Other (Please Specify)	☐

		Check as Appropriate	
4	Does your system provide data import and export capability?	☐	☐
5	Will the source code be provided upon purchase of the software?	**Yes** ☐	**No** ☐
6	What are the general features currently available?		
	1. Portfolio Management		☐
	a. Project Life Cycle Management of Investments		☐
	b. Risk Assessment/Analysis		☐
	c. Trend Analysis		☐
	d. Scenario Analysis		☐
	2. Monitoring and Evaluation		☐
	3. Decision Modeling		☐
	4. Comprehensive Report Generator		☐

		License Fee	Implement-ation
7	What is the cost per module in US$ for a configuration that supports:		
	a. 1,000 clients		
	b. 2,000 clients		
	c. 5,000 clients		
	d. 10,000 clients		

		Yes	No
8	Will you be willing to make the full set of modules available for testing?	☐	☐
9	How long has the proposed software version been available for use?		
	a. Under 1 year		☐
	b. 1-3 years		☐
	c. Above 3 years (Please Specify)		☐
10	How often are upgrades done on the software		
	a. Under 1 year		☐
	b. 1-3 years		☐
	c. Above 3 years (Please Specify)		☐
11	Do you provide a report writer/query facility with the software?	**Yes** ☐	**No** ☐
12	Is the software provided with:	**Yes**	**No**
	a. On-line help facility	☐	☐
	b. Technical Support Documentation	☐	☐
13	What development tools are provided with the software (Please Specify)		

		Check as Appropriate	
	Vendor Details		
14	How long has your company been in the software business?		
	a. Under 3 year	☐	
	b. 3-5 years	☐	
	c. Above 5 years (Please Specify) _____	☐	
		Yes	**No**
15	Does your company provide training for users:		
	a. At the implementation stage	☐	☐
	b. With each successive upgrade	☐	☐
16	Will you be willing to provide support in Jamaica?	**Yes**	**No**
	a. 24 hour hot line: by phone ☐ by email ☐	☐	☐
	b. Local agent (please specify) _____	☐	☐
	c. On-site support, if necessary	☐	☐
17	Do you provide consultancy services in the areas of:	**Yes**	**No**
	a. Development	☐	☐
	b. Capacity Planning	☐	☐
	c. Deployment	☐	☐
	d. Data Conversion	☐	☐
	e. Configuration Management	☐	☐
	f. Change Management	☐	☐
	g. Training	☐	☐
	h. Other (Please Specify)	☐	☐
18	Who are your major (top 5) clients in the Public Sector Investment Management Systems/Portfolio Management Systems in the:		
	a. Caribbean		
	b. Rest of the world		
19	Do you offer hosting options for your software? If so, please describe	☐	☐
20	Do you offer payment options for your software modules and services? If so, please explain	☐	☐

Software Requirements Questions

	Specific Requirements-Based Questions	Y / N	Details (where necessary or applicable)
	Part 1: Core Basics		
1.	Does the system provide for generation of an Audit Trail of all changes applied to records maintained?		
2.	Does the system apply Workflow Management Functionality to the Project Conceptualisation, Screening and Approval processes for different project types (development & PPPs) ?		
3.	Does the system apply Workflow Management Functionality to Project Activity Tracking?		
4.	Does the system provide any type of Electronic Document Upload?		
5.	Does the system provide Public Sector Investment Management Modules capturing the entire project life cycle?		
6.	Does the system provide Portfolio Management Modules?		
7.	Does the system provide Monitoring and Evaluation (Earned Value Management, Results Mapping, etc) Modules?		
8.	Does the system provide a Report Generator?		
9.	Does the system facilitate interface with common public budget and other financial management information systems?		
10.	Does the system facilitate interface with common public project management software?		
11.	Does the system provide role-based security and user management?		
12.	Does the system capture and record approval levels to be ascribed to different officers and roles?		
	Part 2: Portfolio Management		
13.	Does the system allow for online creation and submission of a project concept and proposal document by web form completion?		
14.	Does the system allow for the assignment of unique project identifiers based on rules and at various entry points into the project life cycle?		
15.	Does the system allow for updates and notifications on the status of the project concept and proposal approval processes?		
16.	Does the system allow for gap analysis of project concept and proposal documents?		
17.	Does the system allow for ranking of project concept and proposal based on set criteria?		
18.	Does the system allow for automatic email notification of submission and approval of project management plans (scope, schedule, etc.) and other related project documents?		
19.	Does the system allow for the management of financial data relating to the project (IDP disbursements, inflows, commitment fees)?		

	Specific Requirements-Based Questions	*Y / N*	*Details* *(where necessary or applicable)*
20.	Does the system allow for the creation of results matrix/log and performance measurement framework documents at project/portfolio levels?		
21.	Does the system facilitate management and cross referencing of project dependencies?		
22.	Does the system allow for risk assessment and profiling based on selected criteria?		
23.	Does the system allow for the drill down & disaggregation of project data to the activity level?		
24.	Does the system provide a mechanism to generate alerts based on project status?		
25.	Does the system provide a feedback mechanism between project proposers and reviewers?		
26.	Does the system allow for the aggregation of projects into a portfolio view, based on selected criteria?		
27.	Does the system provide a dashboard capability?		
28.	Does the system allow for scenario analysis?		
29.	Does the system allow for financial and other trend analyses?		
30.	Does the system allow for the comparison of portfolios?		
31.	Does the system allow for alignment of projects/portfolios with national priorities ?		
	Part 3: Monitoring and Evaluation		
32.	Does the system allow for the tracking of project variances as it relates to expenditure and non-financial performance targets?		
33.	Does the system allow for the calculation of various earned value measurement metrics?		
34.	Does the system simulate scenarios of likely end date for a project by comparing status against baselines (budget, scope, and schedule)?		
35.	Does the system allow for automatic calculation of cost performance and schedule performance indices?		
36.	Does the system facilitate forecasting the meeting of budget and schedule with the use of different schedule compression techniques (eg. fast tracking, crashing, etc)?		
37.	Does the system allow for the maintenance of historical data on project performance?		
38.	Does the system allow for the creation of implementation plans (resources and activities) linked to objectives?		
39.	Does the system track the inventory of approved projects that are awaiting financial resources for implementation based on selected criteria?		
40.	Does the system allow for results mapping?		
41.	Does the system allow for the generation of a results matrix at the project and portfolio levels?		
42.	Does the system issue follow up reminders?		

	Specific Requirements-Based Questions	Y / N	Details *(where necessary or applicable)*
	Part 4: Reporting Module		
43.	Does the system allow for the creation of text based reports?		
44.	Does the system allow for the creation of tabular reports?		
45.	Does the system allow for the creation of graphical reports and other data visualisation?		
46.	Does the system allow for the geo-spatial representation of project data?		
47.	Does the system allow for the creation of ad hoc/user defined reports?		
48.	Does the system allow for the automated email distribution of reports?		
49.	Does the system allow for the generation of reports based on historical and current data?		
50.	Does the system allow for the creation of monthly, quarterly, annual and multi-year reports?		
51.	Does the system provide pre-defined reports?		
	Part 5: Decision Modeling		
52.	Does the system allow for the ranking of a project based on set criteria at the project level?		
53.	Does the system allow for the ranking of projects based on set criteria at the portfolio level?		
54.	Does the system allow for the use multiple sets of criteria in the ranking of projects?		
55.	Does the system allow the use of multivariate analysis in the ranking of projects? (e.g. matching project outcomes against strategic objectives at sectoral and national levels; best impact, etc.)		
56.	Does the system allow the use of social cost benefit analysis (SCBA) in the ranking of projects?		
57.	Does the system provide decision support for project intervention? (e.g. suspension/termination of project, adding resources to a project)		
58.	Does the system provide for comparative analysis of initial impact assessment versus actual outcomes?		
59.	Does the system enable the creation of a knowledge base to facilitate lessons learnt to inform future planning?		
60.	Does the system offer predictive analysis?		
61.	Does the system allow for risk/reward analysis?		