

Information Technology Capital Investment Program
Project Close Out Report

To: Information Technology Strategy and Investment Committee
John Vittner, Office of Policy and Management

From: Michael Romeo

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Agency: Department of Revenue Services

Project: DRS IT Modernization Project Business Case Development

Project Start Date: 2/1/2016



Project End Date: 3/30/2018



Project Manager: Michael Romeo and Michael Perkowski

Total Funds Requested: \$495,000

Total Funds Allotted to Agency: \$495,000

Accumulative Total Capital Fund Expenditures to Date: \$467,595

Brief Project Description/Summary:

This project will enable the Department of Revenue Services (DRS) to secure the services of an outside IT Consultant to assist with the development of a business case for a future IT solution. It will identify IT and business solutions that will maintain and enhance DRS's ability to collect and administer Connecticut taxes and revenue. DRS seeks an independent, highly experienced third-party consultant to develop a sensible and comprehensive tax system modernization business case and roadmap. This project will utilize the information gathered from its ongoing IT Modernization Project.

List Project Goals and Deliverables Completed:

(Please provide a brief summary of the goals and deliverables that were implemented. Please reference the IT Capital Investment Brief for the initial goals of the projects.)

The goal of this project was to hire a third party consultant to assist DRS with justifying the need for a new Modernized Integrated Tax Solution and to assist with the RFP process. Gartner, the third party consultant hired for this project has completed the following services:

- **Developed a Business Case for Modernization** that outlined the strategic goals, the case for change, the future business capability model, strategic solution alternatives, cost estimates and benefits.
- **Developed the Functional and Technical Requirements and Use Cases** that will serve as the foundation for the new tax system which will be based on a commercial off the shelf (COTS) solution.
- **Developed the Request for Proposal (RFP)** including all accompanying procurement documents to establish a strong negotiation position for DRS and ensure vendors receive all information needed to deliver their best proposal.
- **Developed a Proposal Evaluation Model and selection framework** to facilitate the evaluation of vendor proposals and support DRS vendor selection using procurement best practices.

S/DAS Deliverables:

- **Final RFP** was submitted to DAS procurement for issuance.
- DAS issued the RFP on February 2, 2018 with a response date of March 19, 2018
- Initial funding was requested and approved
- Proposals were evaluated
- A vendor was selected

Project Replication Opportunities:

(Are there opportunities to repeat or leverage the project solution by other state agencies? Please provide a brief explanation.)
No, this solution is specific to Tax Administration.

Key Lessons Learned:

(Provide any lessons learned or experienced during this project that may be helpful to other agencies starting a similar project.)

Hiring a third party consultant who had direct experience in drafting RFP's for this type of IT solution ensured that our requirements were thoroughly documented, our timeline was kept on track and the most experienced vendor was selected.