

REQUEST FOR PROPOSAL SOFTWARE AND IMPLEMENTATION SERVICES

REQUEST FOR PROPOSAL

The City is seeking competitive Proposals from qualified software vendors/implementers to install, implement and configure a Work Order Management System (WOMS) for assets excluding vertical assets.

SECTION 2 - PROJECT BACKGROUND

The primary objective of the City is to select a WOMS that meets the requirements of the Government entity departments such as Engineering, Field Operations, and Customer Support as defined in this RFP but also includes common features and functionality which may be used by other City departments. This section includes background information for the WOMS implementation project for use in preparing the proposal. This background information is neither comprehensive nor complete, and prospective Vendors are encouraged to seek clarifications, if needed, to formulate a comprehensive proposal.

SECTION 3 - SCOPE OF SERVICES

The Vendor shall provide implementation services to complete configuration, installation, and training of the selected WOMS solution. At a minimum, the services shall include:

1. Project Management

Produce and maintain a written Project Plan including the tasks, milestones, schedule, deliverables, communication, risk management and resource management for the WOMS implementation.

2. Requirements Definition

Document the roles, processes, and functions as implemented by the WOMS in accordance with the requirements provided by the City.

3. Software and Hardware Specifications

The City requires the delivered solution to be cloud-based and require minimal on-site hardware. Vendor will provide technical specifications for any 3rd party software and/or hardware that will have to be procured by the City in order to implement the WOMS Solution. This includes specifications for items such as servers, desktop computers, laptop computers, tablets and/or phones.

4. Software Installation

Install, implement and configure the database and application software and work with city as instructed. Vendor will perform any installation required for City servers, workstations and mobile devices required for the WOMS solution. A plan will be provided for the installation process. Confirm access across all computers and devices for development, testing and production use.

5. Software Configuration

Create a Configuration Plan that describes how the software will be configured to meet City needs. Modify screens, menus and reports, and add user-defined fields as required to meet City needs, excluding any custom programming.

6. GIS Integration

Provide specifications for preparation, integration and maintenance of the City GIS. This includes integrating the GIS with the WOMS, importing/synchronizing information between the systems, and configuring map related search, display and editing functions necessary for effective WOMS operation. Direct connection utilizing web services to access the ESRI asset database is a requirement.

7. Vendor System Integration Design

Provide integration with the WOMS, importing/synchronizing information between the systems (CIS, Permitting, Accela, 311, ERIS (SCADA), Samsara Telematics, IT Pipes, Munis, and configuring related search, display and editing functions necessary for effective WOMS operation. Include API documentation for all integrations that apply. Provide a table listing each 3rd party software that your product has integrated with, and the name of the project and client who implemented it.

8. Data Migration

Import, validate and test the system with data furnished by the City. This will include the full set of historical data in the existing system. The Vendor shall define the interfaces and data conversion necessary for the migration and the responsibilities of the City and the Vendor.

9. Testing

Create a System Test Plan to confirm the applications function properly in the City's environment. Demonstrate capability and resolve all issues in the configuration, data conversion, and/or performance. Vendor must utilize a testing environment, and share typical development, staging and production

environment architecture diagrams. System Test Plan should include licensing for multiple environments for testing and staging. System Test Plan must be reviewed and approved by the City.

10. System Acceptance

Produce a System Acceptance Plan including functional and performance requirements and the process for resolving issues. This plan should include a user acceptance test (UAT) with a comprehensive scoring matrix and specific pass/fail parameters for the evaluation. Vendor will provide recommended UAT test scripts which FWCU may adjust or augment. Vendor will execute the plan in coordination with the City and correct implementation deficiencies that may be identified.

11. Training

Create and execute a comprehensive Training Plan to ensure effective use of the WOMS by the City. Vendor shall provide information on how to access training information and videos.

12. Startup (Go Live)

Providing on-site start-up support for the WOMS solution, assuring system availability to all users.

13. Performance Period

Provide remote and/or on-site support and correction of system deficiencies for a performance period of 36 months from the "Go Live Date".

14. Ongoing Technical Support

Provide technical support and install software updates, fixes, and patches after the performance period. Response must describe the process for applying patches and updates and the role of the Vendor and the City.

Upon selection of a Vendor, implementation is required to be complete within eight (8) months from the selection date.

The proposal shall be written in sufficient detail to permit the City to conduct a thorough evaluation of the system software and implementation. The proposal must include the following information presented in the order listed.

1. Cover Page

The cover page shall prominently and clearly display the title of this RFP, the RFP number, and the name of the primary proposing firm.

2. Table of Contents

The table of contents should outline in sequential order the major areas of the proposal. All pages of the proposal, including the enclosures, must be clearly and consecutively numbered and correspond to the table of contents.

3. Vendor Information

The proposal shall include a brief description of the Prime Vendor, the company's strategic roadmap for the next 10 years, and a description of each proposed subcontractor, if any. If the primary software company is different than the implementation service provider, the service provider will be considered the Prime Vendor and the software company (as well as 3rd party vendors) will be a subcontractor. Include the following information:

- Company name and address.
- Form of business.
- Name and address of bidder to whom all formal notices shall be sent.
- If a partnership or corporation, give the name and title of all partners, or all officers of the corporation with the address of each.
- If a corporation, the name of state in which incorporated and the date of said incorporation.
- Number of full-time employees located in the United States or Canada.
- Location(s) from which services will be provided.
- Proportions (percentage) of employees dedicated to 1) software development, 2) software support/implementation, 3) sales/marketing, and 4) other functions.
- Number of client companies/organizations with active maintenance contracts for the proposed WOMS core software solution, and the corresponding number of computer or user licenses.
- Number of client companies/organizations classified as a municipal government.
- Number of client companies/organizations classified as a water and/or wastewater utility.
- Number of clients with customer base of 250,000 and greater population.
- Number of years in business as a WOMS software company.

4. Implementation Services

The proposal shall include a detailed statement of the services to be provided to accomplish implementation of the WOMS as outlined in this RFP Scope of Services. Deliverables or milestones shall be clearly identified for each activity. A list of assumptions and constraints that materially affect or limit the scope of work shall be included.

5. Functional Requirements

Prioritized functionality includes the items in the table below. The proposal shall include a response to each of these requirements and how they will be accomplished in the proposed solution. Also include any other key functionality that is provided in the solution but not listed in the table below.

Req#	Description
1	Work order creation, management and assignment including template for common activities, defined preventive maintenance, review and closeout process and barcoding to assign assets
2	Utilization of mobile devices to achieve a paperless process. Integration with Mobile Device Management Solutions. Mobile application for field technicians provides the ability to access work orders, update job status, and capture data, images, or videos in real-time.
3	Near real-time work order status tracking
4	Planning/scheduling prioritization, notifications and tracking of time, labor adjusted to rates, consumable and equipment including depreciation values.
5	Ability to create, track, and manage work orders for routine maintenance, repairs, inspections, and emergencies
6	Asset Management. Maintain a comprehensive inventory of sewer, water and other type of assets, including pipes, manholes, pumps, valves, hydrants and other equipment. Track asset condition, maintenance history, and lifecycle information.
7	Customer Communication and Service Request Management. Manage customer service requests, including complaints, inquiries, and service requests. Track and prioritize these requests alongside other work orders. Ability to group service requests and perform analysis with data that can be used for planning replacement and rehabilitation projects.
8	Schedule and automate routine maintenance tasks including inspections to reduce the risk of system failures and extend asset lifecycles.
9	Generate work orders based on maintenance schedules and trigger alerts for upcoming tasks. Identify options for alerts, such as Push notifications and emails.
10	Maintaining historic inspection data
11	Inventory management including multiple/rolling warehouses and receiving/distribution are high priorities. Keep track of spare parts, tools,

	and materials required for maintenance. Automatically update inventory levels when parts are used in work orders. Ability to create inventory levels and notify when inventory is low.
12	Track value of inventoried assets against purchase order allocation of assets, with the ability to track pricing changes based on changes to contract pricing.
13	Dashboards, standard Key Performance Indicators (KPI) reporting, graphing and analytics with capabilities to perform ad-hoc reporting and quality control reporting.
14	Provide printable reports on work order status, asset conditions, technician performance, and overall department productivity which analyze the data to make data-driven decisions and improve operational efficiency.
15	Near real-time integration utilizing web services where possible with systems including Nebulogic (311), Advanced Utility Systems (CIS), ESRI Geographic Information Systems (GIS), , Samsara (Telematics), ERIS (SCADA), FieldLogix, ITPipes (CCTV), Munis (City financial system) and Accela (City permitting system).
16	Ensure compliance with environmental regulations by tracking and reporting relevant data. Generate reports needed for regulatory agencies and audits. Provide data management for water and wastewater treatment operations and water distribution system and sewer collection systems to support monthly and annual compliance reporting and process control.
17	Store and manage digital documentation, such as maintenance manuals, diagrams, and historical records. Attach relevant documents to work orders for reference. Identify how documents are stored and options for storage locations.
18	Role-based access control to restrict system access to authorized personnel. Data security measures to protect sensitive information. Account access including support for Active Directory/Single Sign On and functional groups to limit information access are high priorities. Access must be able to be granted to designees in other City departments and divisions, as well as outside of the City network when appropriate.
19	Maintain an audit trail of all changes made to work orders and other data, ensuring transparency and accountability.

20	Ability to grow with the needs of the department, accommodating a larger number of work orders and assets.
21	Ability to track condition assessment data pertaining to assets, and create live scoring updates based on Consequence of Failure and Likelihood of Failure

6. Implementation Schedule

The proposal shall include an implementation schedule, in the form of a Microsoft Project Gantt chart, which shows the total duration of proposed implementation services, development time requirements, and containing the proposed activities and milestones to be completed within the project.

7. Software License and Support Terms

The proposal shall include a list of all cloud-based services, and software products that must be installed on server, desktop or mobile computers, or handheld devices as part of the proposed WOMS solution. This includes, but is not limited to operating systems, databases, office suites, core WOMS software, add-on modules and 3rd-party applications. The proposal will provide supporting documentation to show that the hosted environment will be System and Organization Controls (SOC) 2 Compliant. Licensing options will be described for the WOMS core software, add-on modules and 3rd-party applications required for the proposed solution. Licensing shall cover development and staging environments as well as production. The quotation shall include a summary of software support and maintenance services associated with the WOMS core software, add-on modules and 3rd-party applications.

Sample software license agreements and software support and maintenance agreements shall be included in the Proposal.

8. System Architecture Diagram

The proposal shall include a system architecture diagram specific to this project with the City that depicts the major functions of modules within the WOMS solution and their relationships to other products such as GIS and CCTV inspection software. The diagram shall depict the expected data transfer methods (API, file transfer, etc.)

9. Appendices

The proposal may include other supplemental information the proposing firm deems relevant and responsive to this RFP. All such supplemental material may be organized in one or more appendices.

SECTION 5 – EVALUATION AND SELECTION PROCESS

This Request for Proposal is being solicited under a multi-step procurement procedure consisting of three phases. The first phase is an initial evaluation and screening of submittals to select vendors for an interview. The second phase includes interviews of the short-listed Contractors and the third and final phase of the selection process is a negotiation with the top selected Contractor.

Phase I requires all Contractors to submit proposals addressing those items cited above. Proposals will be evaluated and ranked to select a short list of Contractors for further evaluation. Note, Phase I includes submittal and evaluation of an initial fee. Only those Contractors who are placed on the short list will be considered for the second phase. The weights for Phase I will be the following:

- Phase #1: Initial Submittal
 - Cost (20 points)
 - Technical (50 points)

During Phase II, interviews and demonstrations will be held with each of the short-listed Contractors. At the end of the interviews and demonstrations, the interview score will be added to the Phase I technical score. Following the interviews, a revised cost proposal of each of the short-listed Contractors will then be opened and evaluated (replacing the initial fee submittal), and the top ranked Contractors will be identified. The weights for Phase II will be the following:

- Phase #2: Short List Submittal
 - 50% Technical (50 points) – *same as Phase #1 score*
 - 30% Interview (30 points)
 - 20% Cost (20 points) – *updated with best and final pricing*

During Phase III, the scope and cost proposal of the top-ranked Contractors will be subject to negotiations. Once an agreement is reached with the top-ranked Contractor regarding the details associated with scope, schedule, and cost, the selection committee's recommendation will be sent to City Council for approval. Once Council approval of the award is obtained, the contract is signed, and work may begin. Should the City be unable to reach agreement with the top-ranked Contractor, negotiations will commence with the second-ranked Contractor. This process will continue until a satisfactory contract is negotiated, or the City exercises its right to reject all proposals.

Proposals will be considered only from firms or individuals that are firmly established in an appropriate business, who are financially responsible, and who have the resources and ability to offer services in a professional and expedient manner. The City may request additional information as deemed necessary. Failure to provide such information may result in the proposal being considered non-responsive