Clayton, Missouri

Request for Proposals

Operations Asset Management Software

City of Clayton
10 N. Bemiston
Clayton, MO 63105-3397

June 9, 2017

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CITY AND PROJECT OVERVIEW

Introduction

The City of Clayton, Missouri ("City") is a suburb located in St. Louis County in the state of Missouri. The City has a population of approximately 16,000 residents. The purpose of this Request for Proposals (RFP) is to help the Departments of Public Works and Parks find a software solution that will help optimize day-to-day operations. The City intends to procure software and services from a vendor to implement Operations Asset Management Software. It is the intent of the City to purchase a hosted solution that will improve customer service, maximize operational efficiency, and simplify cataloguing of data, inventorying of assets, and optimizing their useful life.

Outline of System Objectives and Scope of the Project

The City is issuing this RFP for an Operations Asset Management Software System and its related installation, conversion, migration, and implementation services. It is the City's preference to enter into an agreement with a single vendor who can provide the complete range of required functionality and related services.

The City is seeking a complete response from vendors who can demonstrate that they possess the organizational, functional, and technical capabilities to perform the services, and meet or exceed the requirements and service levels specified herein.

Vendors submitting in response to this RFP must meet the following requirements:

- Solid Customer base utilizing the Vendors software
- Successful experience implementing the proposed software
- Meet all functional and technical requirements stated within this RFP using commercial off-the-shelf software
- A highly intuitive system from a user perspective that can position the City to take advantage of technology to improve departmental performance and efficiency
- Easy access to the data for report and query generation without the need for a programming specialist
- Support for user-friendly mobile technology for field crews
- Asset tracking for specific assets, including the ability to track attributes, work and maintenance history, cost of maintaining the asset, and asset lifecycle management
- The successful supplier shall be responsible for the final City approved design, installation, implementation, and commissioning of the software system including development of user acceptance testing, system integration, and connectivity to existing resources

The City will consider Proposals from single suppliers or from multiple suppliers working as a team. In the event multiple suppliers submit a proposal together, the City expects that there will be one primary contact who will be responsible for the whole project and for coordinating the work of the other suppliers.

Following is an overview of the essential software requirements.

Key Functional Objectives

- Request Management
  - Intake requests from citizens and staff
  - Provide multiple ways to take requests (smartphone, phone call, website, etc.)
  - Provide a way to avoid duplicate or redundant requests
- Work Management
  - Create and complete work on both assets and non-assets
  - Easily create, assign, and complete work activities
  - Roll-up of work activities for project level costing and tracking
- Resource Management
  - Ability to track labor, equipment, and materials costs
  - Allow for multiple labor rates
  - Ability to expense equipment in either time or miles
  - Materials inventory management with quantity on hand
- Asset Management
  - Ability to create asset inventories and track asset attributes
  - Assets contain performance curves to track asset condition and useful life
  - Document inspection results which impact asset condition
  - Add and view attachments to both asset records and inspection records
  - Setup preventative maintenance schedules on assets and trigger work based on asset condition, time, and usage
- Field Access/Mobile
  - Mobile application to perform work and inventory assets in the field. Can be iOS or Android
  - Mobile application must be able to complete work, enter resources, create new assets, and edit existing assets and attributes

INSTRUCTIONS TO VENDORS

Submittal Format

Those organizations interested in responding to this RFP are required to submit their proposal in the following format. Strict adherence to the proposal format is required.

Those submitting sealed Proposals should indicate on the outside of the envelope in the lower left hand corner that it is a sealed proposal for the RFP – City of Clayton - Operations Asset Management Software System. The name of the organization submitting the proposal should also be indicated on the outside of the envelope.

Two (2) hard copies plus two (2) electronic copies (1 in PDF format and 1 in Microsoft Word format) of the entire proposal are required. Proposals are to be delivered to:

City of Clayton
Attn: Dale L. Houdeshell
Director of Public Works
City of Clayton
10 N. Bemiston
Clayton, MO 63105-3397

Proposals should be prepared simply, providing a straightforward, concise delineation of the capabilities necessary to satisfy the requirements of the RFP. Technical literature and elaborate promotional materials should not be submitted at this time.

Emphasis in the proposal should be on completeness, clarity of content and adherence to the presentation structure required by this RFP and not on volume. Costs for developing proposals in response to the RFP are the obligation of the Proposer and are not chargeable to the City. All proposals and accompanying documentation will become property of the City and will not be returned.

Proposals will be evaluated based on overall clarity and quality, vendor viability and strength, vendor experience, ability to meet functional and technical requirements, and cost of ownership. The City reserves the right to select the vendor whose proposal, in the City's sole judgment, best meet the needs of the City. The City reserves the right to reject or cancel any and all proposals for any reason. Proposals lacking required information will not be considered. Proposals shall follow the format below with the required information provided in each section as noted.

Please have your proposal **submit**ted to us **no later than 2 p.m.** on **07/14/2017**. Late proposals will not be accepted. All questions regarding this Request for Proposal should be directed to contact **Dale L. Houdeshell**, Director of Public Works, at dhoudeshell@claytonmo.gov. Questions will only be entertained until 06/28/2017.

Timeline

Event	Date
Release RFP to Vendors	June 12, 2017
Vendor Questions Due	June 28, 2017
Answers to RFP Questions Released	July 7, 2017

RFP Responses Due	July 14, 2017
Vendor Selection	August, 2017

Proposal Format and Content

Section	Title	Information to be Included
Section 1	Cover Letter	A Cover Letter on company letterhead • Signed by an official in your organization authorized to bind the vendor to all of the statements contained in the proposal. • State the length of time the proposal terms remain firm, which must be a minimum of 120 days from the proposal due date.
Section 2	Vendor and Software Platform Overview	Provide a general description and overview of the vendor and the proposed software platform. Include in this section how your software can help the City with requests, work management, asset management, resources management, and mobile access.
Section 3	Implementation Approach	Provide a description of your implementation methodology for this project including all significant tasks involved as well as an estimated project timeline.
Section 4	Functionality Matrix	Please complete the functionality matrix included with this RFP. If the proposed software meets the requirement, place an X in the first box. Comments can be added in the matrix regardless whether your software meets the requirement or not. The column for "meets" is for City scoring so please leave that box blank.
Section 5	Costs & Contract Terms	The City is seeking comprehensive pricing with terms and conditions, so please include an executable document. The City is seeking a 3 year proposal from the vendor. The City is looking for the following to be included in the pricing. 1. Hosted Deployment 2. Must integrate with the City's CRM solution, QScend, via their open web API. 3. Would need licenses for 20 back-end users. 4. Work Management 5. Resources Management 6. 9 asset modules (Pavement; Signs; Street Lights; Traffic Signals; Parking Meters; Trees; Water Mains, Hydrants, and Valves; Parks; and Sidewalks and Curb Ramps).

FUNCTIONALITY MATRIX

Minimum Requirements Check Sheet –Operations Management System

Please check all that apply and add comments if necessary.

Category		Meets	Max Score	Comments
Company Experience and Software Methodology				Scored by each category
	Over 5 years of experience in providing government software solutions for Operations Management		18	
	Customer base of over 100 customers		15	
	Vendor develops, implements, and supports their own software		20	
	Software is web-based and it is preferred to be written in HTML5		14	
	Integrates with Active Directory Federated Service (ADFS) for authentication		15	
	Cross-browser compliant (compatible with Internet Explorer, Firefox, Chrome, and Safari)		10	
	Hosted (Cloud) deployment is available		8	
	User-centric design (each user can customize their own screens and layout)		12	

	Easy-to-use design and persistence technology that remembers each users settings		8	
	Ability to bi-directionally integrate with Esri using ArcGIS Online and Desktop		10	

Request Management Capabilities				Scored by each category
	Ability to take requests from phone, walk-in, smartphone, and via an integration with the City's CRM solution, QScend.		12	
	Interface to take requests from both internal staff and citizens, including taking a request from a mobile app		8	
	Ability to associate duplicate request calls to the same request		10	
	A single request can have multiple tasks or work orders associated to each		10	
Resource Management Capabilities				**Scored by each category**
	Laborers can have multiple rate types (Standard rate, Overtime rate, holiday rate, etc.)		7	
	Each piece of equipment can be expensed in either time or miles		8	
	Materials can be inventoried and quantity used deducted from the quantity on hand		10	
	Automatic email notifications from material reorder points		10	
	Workers can easily enter resources like labor, equipment, and materials used from a dropdown list		10	

Work Management				Scored by each category
	Ability to create work on both assets and non-assets		10	
	Ability to create non-asset tasks without a location being required		6	
	Ability to group multiple tasks into a work order for cost and progress level tracking		14	
	Create repeating work orders on a scheduled basis, and the tasks can be both asset specific or non-asset related, or a mixture of each		15	
	Attach files to both tasks and the work order (project)		5	
	Assign a priority to a task and work order		5	
	Efficient and straightforward process for creating new tasks, including selecting assets from a map		5	
	Assign tasks to a worker and a group of people		5	
	Automatic email notifications when a task has been assigned to a worker		5	
	Easily reassign tasks from one worker to a different worker		10	
Asset Management				**Scored by each category**
	Pavement asset application with the capability of doing PCI inspections		10	

	Signs asset application with a MUTCD library		10	
	Trees asset application with a tree library		10	
	Asset applications for Street Lights		10	
	Asset applications for Traffic Signals		5	
	Asset applications for Water Hydrants, Water Mains, and Water Valves		5	
	Asset applications for Parking Meters		10	
	Asset application for Parks		5	
	Asset application for Sidewalks and Curb Ramps		5	
	Setup preventative maintenance activities on assets based on asset condition, time, and usage		15	
	Assets have performance curves and an estimated useful life		15	
	Asset inspections have customizable inspection condition categories and the inspection condition can be a weighted average of the categories		15	
	Each asset has a task history section for easily seeing past work that has been done on the asset		10	

	Associate work to an asset and see the total cost of maintaining the asset		10	
	Every asset has its own unique set of attributes that can tracked and edited		5	
Mobile				Scored by each category
	Mobile applications for either iOS or Android		10	
	Choose from a variety of basemaps on the app		10	
	Ability to complete work & tasks from the app		10	
	Enter resources from the app, preferably from a drop down list		5	
	Create new assets (point, linear, and polygon asset types) on the app leveraging the onboard GPS		25	
	Edit existing asset's location and attributes on the app		20	
	Create work on specific assets on the app		10	
	View and add attachments to assets, inspections, and tasks on the app		15	
	Choose what assets are displayed on the app		5	

Reporting & Exporting Data			Scored by each category	
	Software offers reports out-of-the-box		5	
	Users can create custom or ad-hoc reports. If yes, please specify the report engine		10	
	Software allows the user to sort and filter specific data and then export the data with a single click as a CSV file		15	
	Ability to report, sort, and query on any field		25	
VENDOR TOTAL			600	