

Request for

Competitive Sealed Proposal

CSP21-502 Addendum 2

Project Management Software Suite - Municipal Construction

NIGP Commodity Code(s):

208-68 Software, Microcomputer, Project Management, IBM Compatible

FILED
CITY OF TULSA
STATE OF OKLAHOMA
2021 MAY 24 PM 12:59
OFFICE OF THE
CITY CLERK

Submit proposals (sealed) to:

Deputy City Clerk
City of Tulsa
175 E. 2ND St.
Suite 260
Tulsa, OK 74103



CITY OF
Tulsa
A New Kind of Energy.

Issued May 24, 2021

Addendum #2

Please note the following changes which have been made for clarification to this Request for Competitive Sealed Proposal. This addendum must be listed as Addendum #2 on the "ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS" Form of the bid package as verification that you have received and are aware of the information contained herein.

CHANGES/QUESTIONS/CLARIFICATION:

CHANGES:

1. Items E through M under section VII. RESPONDENT AND PROPOSAL REQUIREMENTS were changed in error by Addendum 1. This addendum restores the language for these items to that which appeared in the original solicitation.
2. Language was removed from Exhibit A in error by Addendum 1. This addendum restores the language for Exhibit A to that which appeared in the original solicitation.

Addendum #1

Please note the following changes which have been made for clarification to this Request for Competitive Sealed Proposal. **This addendum must be listed as Addendum #1 on the “ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS” Form** of the bid package as verification that you have received and are aware of the information contained herein.

CHANGES/QUESTIONS/CLARIFICATION:

CHANGE: The due date for this project has been extended to June 2, 2021

QUESTIONS/CLARIFICATION

1. Part V – Scope of Work – #2 - When it comes to capital budget planning capabilities of the proposed software; will this include the planning and forecasting of direct costs and indirect costs of resources and personnel?
Response: Ability to track trends for estimating purposes of common pay items
 - a. Will there be the need to budget on equipment costs, both permanent and leased/hired?
Response: No
 - b. Are there any “mobile” abilities required/inferred for capital budget planning?
Response: No
2. Question: Part V – Scope of Work - #5 (also questionnaire 1.1.4) – When it comes to viewing, markup, and collaborating on PDFs and/or other BIM drawings, what capabilities does the City’s current system(s) have to do this?
Response: Adobe Acrobat Pro, Bluebeam, Track via Excel
 - a. If not done in a system(s), what is the current process to accomplish this task?
Response: Email, MS Teams, Sharepoint
 - b. Would the City consider another software platform to do this function outside of the Project Management Software Suite?
Response: Yes, provide a statement related to the software platform and contain within the proposal. Explain the interaction of the two platforms if any.
 - c. Where are the BIM drawings, PDF files stored?
Response: Currently on the City Server
 - d. Is the versioning maintained manually or by a WorkFlow Management like Microsoft One Drive (using Teams or Office365) or Dropbox?
Response: Typically logged in Excel, starting to use MS Teams/Onedrive more frequently
 - e. Can City share the names of the commercial software used in “red line” tracking of version changes of BIM drawings and/or any other non-structured Data Applications?

It will help us to find if these software expose external APIs which can be invoked from within the Project management platform and users can compare changes without leaving the Project Management Software platform. **No**

3. Question: Questionnaire 1.2.11 – Can the City further explain the use case for this requirement to have client personnel revise schedule templates without the use of technical support?

Response: Does the preparation of a template document/file require interaction with the vendor or can a template be created/modified by City personnel.

4. Question: Questionnaire 1.3.10 – Can the City list out the current contractor-focused construction management tools for integration?

Response: The contracting community utilizes multiple platforms within their organizations for tracking projects, schedules, RFI's, Shop Drawings, etc. Does your solution work with multiple ones in the industry, what is the ability and what platforms does your solutions work with.

- a. Is the City aware of how those tools integrate today?

Response: No

- b. Does the City have a proposed process as to how RFI import and exports would work in this fashion?

Response: Contractor identifies a need for additional Information, submits RFI, which can be viewed by City personnel and Engineer of Record for response.

5. Question: Questionnaire 1.4.11 – How are line item level updates completed in the budget when a change order is approved in the current City's system/process?

Response: Are change orders completed as a Lump Sum or does the software solution have the ability to add an item into the contractor by Change Order that can be used with unit pricing.

6. Question: Partial Payment Process flow diagram & Questionnaire 1.5 – Does the City have additional diagrams of current/to be Pay processes beyond the supplied Partial Payment Process?

Response: No

- a. Question: How is the retainage percent determined and administered for City contacts today?

Response: 5% in accordance with Oklahoma Statutes Title 61 § 113.1.

- b. Question: How does the City currently adjust open commitments and actual for a project based on the approvals of payment applications?

Response: In accordance with Oklahoma Statutes Title 61 § 121.

7. Question: Questionnaire 1.5.4 - Can the City please clarify what their vision is for the future solution? In a perfect world, how would this process work?

Response: In accordance with Oklahoma Statutes Title 61 § 113.1.

8. Question: Questionnaire 1.5.9 - Can the City please clarify what their vision is for the future solution? In a perfect world, how would this process work?
Response: In accordance with Oklahoma Statutes Title 61 § 113.1.
9. Question: Questionnaire 1.5.10 – How does the City check that payment amounts requested at line levels do not exceed commitment amounts today?
Response: Currently we track pay items line by line with a percentage used to date. For project purposes the quantities are estimated only to be used by the City of Tulsa, who reserves the right to increase, decrease, or eliminate estimated quantities of work in accordance with Section 104 of the Oklahoma Department of Transportation Standard Specifications as adopted/modified by the City of Tulsa.
10. Question: Questionnaire 1.5.11 – Can the City elaborate further on the requirement of the system being able to display the payment status after final approval of payment requests?
Response: Are contractors, City Personnel, etc., able to track payment status through the approval process?
11. Question: Questionnaire 1.5.12 - Can the City please clarify what their vision is for the future solution? In a perfect world, how would this process work?
Response: Contractor submits quantities for pay application. City staff will review and verify quantities. This may include material on hand and backup documentation for specific items.
12. Question: Questionnaire 1.5.13 – How does the City go about communicating and collecting required payroll documents/disclosures today?
Response: Request the documents from the contractor with each invoice. City staff conducts required interviews.
13. Question: Questionnaire 1.6.5 – Can the City provide us with a flowchart/process of the current corrective action list/punch list process? Specifically, how these lists are modified and attributes classified?
Response: No. During the construction process, does your platform have the ability to track corrective actions needed for the project and have the ability to check of the items addressed or roll into a final punch list if not addressed at that time?
14. Question: Questionnaire 1.7 – As this entire section is un-bolded/”nice to have”, does the City have any proposed design/process flows that can be shared to further explain the functionality required?
Response: No. A Contract tool is not a requirement of the platform, but if your platform has this capability or ability to expand to accommodate Contracting please specify.

15. Question: Questionnaire 1.7.3 - Can the City please clarify what their vision is for the future solution? In a perfect world, how would this process work?
Response: Common documents, common pay items, etc.
16. Question: Questionnaire 1.7.6 - Can the City please clarify what their vision is for the future solution? In a perfect world, how would this process work?
Response: If contracting housed through the platform is there a fee associated with advertising, etc.
17. Question: Questionnaire 1.8 – Repeat question from #11?
Response: No. A Bid Management tool is not a requirement of the platform, but if your platform has this capability or ability to expand to accommodate Bid Management please specify.
18. Question: Questionnaire 1.9.6 – When the City states “no extraneous information”, please define/clarify?
Response: Can the City build reporting template documents? Edited to display only what is desired to be shown on the template?
19. Question: Questionnaire 1.9.17 – What does the City consider as, “a full suite of reports”? Does the City have and can share a current list of reports used along with corresponding data fields, usage statistics and users?
Response: Reports that would be typical for a project including Pay Applications, RFI’s, Shop Drawings, Schedule, Project Status information, Daily Reports, Logs, etc.
20. Question: Questionnaire 2.2.1 – Can the City expand on what they define as the “Client Database”?
Response: All information contained within each specific project.
21. Question: Questionnaire 2.2.7 – Can the City expand upon the requirement of level of access needed to Client Data systems?
Response: Does your system support multiple levels (internal and external of the city), does it require admin privileges or are their view/read-only options to access the project information? Can accessed be restricted for specific levels of access?
22. Question: Questionnaire 2.3.2 – Can the City expand on disabled access needs of the proposed system? Does the City require WCAG/ADA compliance for this new system?
Response: No, however please advise if the solution WCAG/ADA compliant
23. Question: Questionnaire 2.5 – The first few elements speak to disaster recovery. Can the City expand on 2.5.1(2)(3)(4)?
Response: If server information is breached or lost, what is the solutions recovery protocol, etc.?

24. Question: Considering current state COVID workplace restrictions, what are the City's onsite/remote expectations for the completion of the new software system (pre-bid conferences, training, technical support, installation, etc.)?

Response: The "Pre-Proposal Conferences" have been completed. Since most of the COVID-19 restrictions have been lifted we expect training, technical support, installation, etc. to be carried out as would have been done in the pre-pandemic period.

25. Question: Does the City have internal instructional delivery and OCM resources available to support the onboarding and advocacy of this new proposed system?

Response: Our response assumes the definition of OCM is Organizational Change Management. The Respondent will be responsible for all aspects of the original training and instruction. The City of Tulsa does not make use of OCM and instructional delivery systems that lend themselves well to integration with or use by third party material.

26. Question: What is the overall current landscape of technology assets at the City/Municipal Construction supporting asset? PC usage/configuration, mobile usage/configuration, etc.

Response: City Staff utilizes desktops, laptops and iPhones with hot spot capabilities.

27. Question: What is the expected volume usage of this proposed system in terms of contracts, size, scope, duration, costs, user #, client #, etc.?

Response: The city has 50-75 active projects at any given time. These projects may be as short as two weeks to more than two years. The expectation is all Capital Projects would run through the platform. Roughly 175-200 internal users (55 inspector level, 10 Construction Manager level, the remaining would be design/planning staff to assist with project correspondence). Engineering Consultants would need access for correspondence and addressing RFI's, assisting in shop drawings review and potentially providing inspection services. Contractors need access to update schedules, shop drawings submittals, RFI's, Pay Applications. This may involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.

28. Question: Considering current state COVID considerations, are the documents indicated in the CSP requiring notarization still require notarization?

Response: Yes

a. If so, will the City accept notarization from outside Oklahoma?

Response: Only digital notarization is required to be made by specific Oklahoma notaries; wet ink notarized documents from any state authorized agencies are acceptable.

- b. Further, is the City considering electronic submission only vs. current hard copy submission requirements?
Response: No
29. Question: What current collaboration tools does the City employ (O365, MS Teams, One Drive, etc.)?
Response: MS Teams & One Drive
- a. Question: Does the City have other current software that integrates with current City collaboration tools?
Response: No
- b. Question: If so, what are they and in what manner do they integrate and what processes (that might be in scope for this effort) do they support?
Response: N/A
30. Question: Can you define numbers and types of users, including contractors?
Response: No. Roughly 175-200 internal users (55 inspector level, 10 Construction Manager level, the remaining would be design/planning staff to assist with project correspondence). External Design Consultants and Contractors unknown. The City has 50-75 active construction projects at any given time.
31. Question: Do you anticipate allowing external users, such as Consultants and General Contractors, to access the software?
Response: Yes. Consultants may provide construction inspection or support services. General Contractors will submit shop drawings, RFI's, Pay Applications, Schedule updates.
32. Question: Does the City have a preference between an On Premise or SaaS solution?
Response: No
33. Question: How many and with what systems is the city looking for solution to integrate with? Just ERP, LUCITY, CITY RMS and GIS Systems?
Response: Items are considered out of scope (V.B)
34. Question: Is historical Data from current systems going to be migrated to new system? If so, how much data/files? Just 6-90 current or all historical projects data?
Response: No plans to migrate historical documentation at this time. As new projects come about, begin utilizing solution.
35. Question: Is mobile wanted as part of the solution? If so, how many and what kind of devices are used in the field to complete work/inspections/approvals?
Response: Yes. 55 inspector personnel. Laptops and iPhones equipped with mobile hotspots.
36. Question: Are all the projects capital projects? Do you have a breakdown of project (new, upgrades, retrofits, repairs, etc.)

Response: Most are capital (new, upgrades, retrofits, repairs, etc.), some may be developer driven (require daily logs and record keeping, no pay items tracking).

37. Question: Does the potential exist for other departments within the city to adopt the system for projects and other functionality that an IWMS solution would provide?

Response: Yes

38. Question: Does the City have a timeline for go live of new system? What is driving that timeline?

Response: Within 1 year of contracting. Driving factor is to move away from Excel tracking and management

39. Question: What is mean on the title page, "IBM Compatible" with the NIGP Commodity Code? Are you currently using any IBM products? i.e., Maximo

Response: This question references the NIGP Commodity Code 208-68 which defines, "Software, Microcomputer, Project Management, IBM Compatible", which is project management software for IBM compatible microcomputer. Purchasing registers vendors by the commodity each choses to provide. Bid opportunities are identified by the commodity to create proper notification of the opportunity.

40. Question: Can vendors attend the Standards, Specifications, and Awards Committee meeting?

Response: Yes

Question: If so, are vendors able to attend that meeting virtually?

Response: No

41. Question: If the software vendor could provide the licensing, implementation services, training, support, etc., would the City prefer to purchase directly from said software vendor? Or, would the City prefer to purchase from an implementation partner/consultant who works with a preferred software vendor?

Response: Looking for the vendor to provide the best solution at an equitable cost. If that entails a consultant for implementation provide the information and associated cost within your proposal.

42. Question: Is the City expecting a 5 year term with the understanding that each year needs to be treated as a renewal?

Response: In the case of Software as a Service (SaaS) yes.

43. Question: What is the City's projected capital funding per year for the next five years?

Response: Due to the problems caused by our recently publicized cyber-attack, we cannot be more precise than to annualize the 5-year period as \$323,266,600 per annum.

44. There is no mention of data migration in the scope of the RFP. However, there is a line item for Data Conversion in the System Implementation Cost Details sheet (Item 2.5). Should the Vendor leave Item 2.5 blank since there are no data migration details in the RFP?

If the City does want to migrate historical data into the new solution, please provide details of what type of data the City wants to migrate (i.e., projects, contracts, logs, budgets, funding information, etc.).

Please also provide information on the quantity of each data type (i.e., number of records and/or amount in MBs) and the current format of the historical data.

Response: The only migration would be PDFs of past contracts and PDFs of record drawings, if City desires to utilize solution for historic documentation. City staff would migrate if the solution can accommodate.

45. The City mentions that integration with the City's GIS system is out of scope. For the record, what GIS system is the City currently using?

At what point in the future might the City want to integrate mapping services from its GIS into the new solution?

Response: ESRI

46. Questions: What is the difference between "End-User Training" and "Training services"?

What is the City's guidance on how the Vendor should provide pricing amounts for these two items?

Response: Adequately describe training including the time period(s) and total attendees with price not to exceed a specified total.

47. Question: Which types of projects do the City personnel in the field work on?

Response: Roadway, waterline, wastewater, stormwater, special projects (parks, fire station, police station, etc), Treatment plants

48. How many non-City employees (i.e., external users like consultants, construction managers, design engineers, architects) will need access to the solution?

Response: Too hard to define. Contractors may utilize office and field personnel. Design consultants may utilize multiple internal staff depending on discipline.

49. What is the City's budget for implementing the new solution?

Are there any restrictions on the amount of funds available per year?

Response: Not disclosed

50. Does the City want to use an eSignature application for recording approvals from stakeholders?

Does the City currently use such an eSignature application? Does the City want an eSignature application integrated with the new solution now or in the future?

Response: Would be nice, not required

51. Does the City require the new solution to be integrated with any other applications besides MS Office applications?
Response: No
52. Does the City want to receive a copy of the Vendor's standard software licensing/subscription agreement for its review?
Response: Yes
53. Question: Has a budget for the system been established and can you share what the budget is?
Response: Budget is not disclosed
54. Question: Is a wet signature on the included affidavits required? Or can they be printed copies of a scanned version?
Response: Wet signatures are required.
55. Question: Is there a target go-live date?
Response: Within a year of contract
56. Question: Are you looking for a SaaS (Software as a Service) solution or is the City of Tulsa looking to Self-Host the software?
Response: We are looking for the best system for the City's needs. Explain why your solution (SaaS or Self-Host) would be better for the City
57. Item 1.9.20 on the questionnaire states: "Do we have the ability to pull our own data to create custom reports?"
- a. Question: Does this mean create your own reports in the application?
Response: Yes
 - b. Question: Or does this mean combine data from another system into application?
Response: No
58. Question: If we are submitting a bid from out of country (eg. Canada) is it ok if we submit it electronically?
Response: All responses must be printed, properly endorsed, sealed in an envelope or box, labeled with your organization's name with project number on the outside of the package and delivered to the City Clerk's office as instructed by the solicitation.
59. Question: Do you accept the RFP through email as digital copy or you only accept physical through Fedex or UPS ?
Response: A digital copy of your response and the Excel sheet is required in addition to your printed proposal.

60. Question: Is onsite training preferred over remote training?
Response: Either is acceptable. We have become familiar with video conferencing.
61. Question: Will the City accept a Train-the-Trainer approach to training its end users?
Response: The "Train-the-Trainer" approach is acceptable providing training material needed to extend the training to additional City of Tulsa user is included.
62. Question: Can you explain the bound vs unbound copies and how many of each need to be submitted?
Response: Section VII, Item A asks that responses are submitted as one unbound original document and a bound copy to distinguish it from the original in addition to a digital copy along with the completed Excel formatted file on a USB drive or optical disc.
63. Question: In regards to Page 5, letter E, do we need to provide the Attachment C in a printed version as well as in a digital version?
Response: Yes, Please include a printed copy of "Attachment C" in addition to including the digital file on digital media.
64. Question: With timing being tight, does the City intend to have a round of demonstrations for finalists? Is the interview expected to be held remotely or in person?
Response: Yes, the City may conduct interviews by video conference.
65. Question: With the City's fiscal year ending in June, did I understand correctly that you'd like to have a contract signed by the end of June?
Response: Yes, that is the City's intention.
66. Question: Are you able to use GSA Schedule 70 as a vehicle to purchase the software?
Response: The City has not used the General Services Administration (GSA) Schedule 70 Information Technology procurement contract.

TABLE OF CONTENTS

ADDENDUM #2II

ADDENDUM #1III

I. STATEMENT OF PURPOSE: 1

II. INSTRUCTIONS FOR SUBMITTING A PROPOSAL:..... 1

 A. GENERAL REQUIREMENTS 1

 B. GENERAL NOTIFICATIONS2

III. BACKGROUND:3

IV. GOALS:.....3

V. SCOPE OF WORK:4

VI. DELIVERABLES:4

VII. RESPONDENT AND PROPOSAL REQUIREMENTS:4

VIII. EVALUATION OF PROPOSALS:5

 EVALUATION CRITERIA6

IX. TIME FRAME FOR REVIEW:6

X. AWARD OF PROPOSALS:.....6

XI. MISCELLANEOUS:.....7

INTEREST AFFIDAVIT8

NON-COLLUSION AFFIDAVIT9

AFFIDAVIT OF CLAIMANT 10

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS..... 11

RESPONDENT INFORMATION SHEET 12

EXHIBIT A – PRICE SHEET SUMMARY 13

CITY OF TULSA GENERAL CONTRACT TERMS..... 17

ATTACHMENT A – REFERENCES..... 19

ATTACHMENT B – PROCESS DIAGRAMS22

ATTACHMENT C - QUESTIONNAIRE24

I. STATEMENT OF PURPOSE:

With this Competitive Sealed Proposal (CSP) request, we are searching to secure services to provide and install a project management software suite to manage municipal construction.

We enthusiastically look forward to receiving your proposal.

II. INSTRUCTIONS FOR SUBMITTING A PROPOSAL:

A. General Requirements

1. The proposal **must** be received by **5:00 p.m. on Wednesday, June 02, 2021, Central Standard/ Daylight Time**. Proposals must be sealed in an envelope or box clearly labeled **“CSP21-502-Project Management Software Suite - Municipal Construction”**.

Proposals arriving late will be returned unopened.

2. Proposals must be delivered sealed to:

**Deputy City Clerk
City of Tulsa
175 E. 2nd St.
Suite 260
Tulsa, OK 74103**

3. All interested Respondents (Sellers) are required to register with the Buyer, in order to receive updates, addenda or any additional information required. The City is not responsible for any failure to register.
4. Inquiries to the Buyer requesting clarification regarding this CSP request or the content herein must be made via e-mail and must be received prior to the end of the business day on **May 17, 2021**.

Terry Thomas, Senior Buyer
tthomas@cityoftulsa.org

Any questions regarding this CSP request will be handled as promptly and as directly as possible. If a question requires only clarification of CSP request instructions or specifications, it will be handled via e-mail, or verbally. If any question results in material changes or additions to the CSP request, those changes or additions will be forwarded to all registered Respondents as quickly as possible by addendum.

5. **Pre-proposal Teleconference:** A mandatory teleconference will be held on Wednesday, May 05, 2021 at 10:00 AM CDT and on Wednesday, May 12, 2021 at 10:00 AM CDT.

Attendance at one of the preproposal conferences is required for your proposal to be considered for an award.

Session details will be provided a day in advance or the day of the conference to those who register with the Project Buyer. Please register no later than 24 hours before the conference

6. Respondents shall designate a contact person, with appropriate contact information, to address any questions concerning a proposal. Respondents shall also state the name and title of individuals who will make final decisions regarding contractual commitments and have legal authority to execute a contract on the Respondent's behalf.
7. Proposals will be opened on the morning after the due date, at 8:30am, at the:

Standards, Specifications, and Awards Committee Meeting
175 East 2nd Street, 2nd Floor
City Council Chamber

B. General Notifications

1. With this Competitive Sealed Proposal request, the City reserves the right to do the following:
 - a. To conduct oral or written discussions with Respondents, after proposals are received, concerning technical and Price aspects of the proposals and/or to allow Respondents to revise their proposals, including Price;
 - b. To evaluate, after proposals are received, the relative abilities of Respondents to perform, including their technical or professional experience and/or expertise;
 - c. To conduct a comparative evaluation, after proposals are received, of the differing Price, service, quality, contractual factors, technical content and/or technical and performance capability of the proposals;
 - d. To negotiate mutually agreeable terms in a contract;
2. The City of Tulsa notifies all possible Respondents that no person shall be excluded from participation in, denied any benefits of, or otherwise discriminated against in connection with the award and performance of any contract on the basis of race, religious creed, color, national origin, ancestry, physical disability, sex, age, ethnicity, or on any other basis prohibited by law.
3. All Respondents shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination.
4. All Respondents shall comply with the Americans with Disabilities Act (ADA) and all proposals and any subsequent contract shall include the following statement:

"Contractor shall take the necessary actions to ensure its operations in performance of this contract and its employment practices are in compliance with the requirements of the Americans with Disabilities Act."

It is understood that the program of the Respondent is not a program or activity of the City of Tulsa. The Respondent agrees that its program or activity will comply with the requirements of the ADA. Any costs of such compliance

will be the responsibility of the Respondent. Under no circumstances will the Respondent conduct any activity which it deems to not be in compliance with the ADA.

5. Although it is the City's intent to choose only the most qualified Respondents to interview, the City reserves the right to choose any number of qualified finalists for interview and/or final selection.
6. This Competitive Sealed Proposal request does not commit the City of Tulsa to pay any costs incurred in the submission of a proposal or the costs incurred in making necessary studies and designs for preparation thereof, or contract for service or supplies.

III. BACKGROUND:

Currently, Engineering Services Department is using Microsoft Excel and Project to track project statuses. The Field Engineering division manages from 60 to 90 active projects at a time. The Engineering Design division has had over 200 active projects at one time. This level of activity makes management difficult. The ideal management suite will be capable of managing:

- Project Quantity reporting
- Daily Inspection Reports
- Request for Information (RFI)
- Shop Drawing / Submittal Tracking
- Document/Design Management
- Task Management
- Project Scheduling
- Contract Management

Incorporation of project tracking and collaborative software will improve communications, workflows, design management, contract management, project management, accountability, transparency and productivity for the City of Tulsa Engineering Services Department. This will help achieve our City Vision of world-class service by harnessing new technological advancements, best practices and processes in project management and by providing the Engineering Services employees new project management tools, methodology of risk management and capital budget planning.

Field Engineering personnel are the primary stakeholders. Planning, Design, Real Estate/Right of Way and Utility Coordination personnel are the secondary stakeholders. Other City departments such as Water and Sewer, Asset Management, Street and Stormwater, and Development Services also have a vested interest in the project. Additionally, the prospective system must share reports with City engineering consultants, City contractors and the Citizens of Tulsa.

IV. GOALS:

- A. Ability to streamline Engineering Services processes and workflows
- B. Ability to prevent construction delays, missed deadlines and project cost overruns with robust reporting and scheduling tools
- C. Improved design management, contract management, project management,

accountability, transparency and productivity

- D. Productivity and efficiency improvements to reduce work stoppage by incorporation of enhanced communications and progress tracking.
- E. Improved communications with internal and external project team members, and the citizens of Tulsa
- F. Automated processing of functions which follow or support our current processes as exemplified in Attachment B.

V. SCOPE OF WORK:

- A. The Respondents system shall provide:
 - 1. Ability for City employees to make informed decisions based on precise project updates and robust progress tracking tools.
 - 2. Ability to proactively perform capital budget planning and forecasting based on accurate, quality data collection
 - 3. Ability to track and view project financial reports such as budget variance report, contract variance report, contract summary report, and commitment summary report.
 - 4. Enhanced workflow management capability to automatically track field communications, daily field inspection reports, Request for Information (RFI) submittals, shop drawing and product submittals and project scheduling
 - 5. Ability to systemically track when individual users access, download, view, and modify the RFI's and project documents
- B. The followings items are considered out of scope:
 - 1. Integration with major City enterprise systems such as Munis ERP, Lucity, and Records Management Systems.
 - 2. Integration with City GIS system.
 - 3. Having direct access to operational sources/systems.

VI. DELIVERABLES:

The products, reports, and plans to be delivered to the City will include:

- 1) Provide and implement a robust, stable, secure, and user-friendly project management software solution.
- 2) Implementation and Training plans
- 3) Provide a mobile version of the application suitable to accomplish project management tasks on tablets or mobile phones

VII. RESPONDENT AND PROPOSAL REQUIREMENTS:

To be considered, interested Respondents should submit or address the following:

- A. One (1) unbound original and one (1) bound copies of the proposal plus one electronic (1) copy of the original proposal on CD, DVD, or USB flash drive.

- B. A description of the Respondent's qualifications and experience and that of key personnel assigned to this project (and that of each firm proposed as part of the Respondent's team). It is noted that equipment, material and staff shall be provided by the Respondent.
- C. A description of three (3) previous projects that Respondent's firm has conducted for organizations of similar size and complexity. Provide contact names and telephone numbers of references from these organizations as requested on Attachment A "References".
- D. Provide a project schedule, identifying beginning and ending dates of work, as well as project target dates. State all dates as time periods relative to a theoretical start date.
- E. Complete and return Attachment C "Questionnaire". Return a digital copy of your completed questionnaire as an Excel formatted file.
- F. Provide cost proposals for YEAR 1 and optionally YEARS 2-5. Refer to Exhibit A – Cost Summary
- G. Describe your support model. Include support escalation and primary contact or relationship management.
- H. Describe your upgrade/update policy for introduction of changes in technology.
- I. Describe quality assurance measures which will be provided in relation to product support. Include product uptime statistics
- J. Give examples of processes and characteristic of your organization which sets it apart from your competitors.
- K. Share any predictions you have on new technology trends related to the project management software solutions.
- L. At the discretion of the City, one or more Respondents may be invited to be interviewed for purposes of clarification or discussion of the proposal.
- M. Any expenses incurred by the Respondent(s) in appearing for an interview or in any way providing additional information as part of the response to this Competitive Sealed Proposal request are solely the responsibility of the Respondent. The City of Tulsa is not liable for any costs incurred by Respondents in the preparation of proposals or any work performed by the Respondent prior to the approval of an executed contract by the City of Tulsa. The City assumes no responsibility or liability for any costs you may incur in responding to this CSP request, including attending meetings or contract negotiations.

VIII. EVALUATION OF PROPOSALS:

A panel consisting of not less than five (5) City of Tulsa employees will evaluate proposals. Selection shall be determined to be in the best interest of the City as evaluated by the City of Tulsa. The approval of the selected Respondent will be subject to the final determination of the City and will be contingent on the successful completion of a contract between the City and the successful Respondent.

Evaluation Criteria

Criteria	Points
Product Functionality: Document Management, Schedule, Submittals, RFI's, Change Orders, Pay Applications, Punchlist, Contracts, Bid Management, Reporting	30
Technical Requirements: Availability, Data Security, Compatibility Architecture, Data Retention	20
Services: Implementation, Training, Support	10
Price Structure	25
Verifiable References	10
Quality and structure of bid response	5
Total Possible	100

IX. TIME FRAME FOR REVIEW:

The time frame for review of proposals is expected to be three (3) to six (6) weeks, but the City reserves the right to vary the period as necessary to meet its objectives. At the discretion of the City, one or more Respondents may be invited to be interviewed for purposes of clarification or discussion of their proposals.

X. AWARD OF PROPOSALS:

The City evaluates proposals based on the general criteria identified in Tulsa Revised Ordinance (TRO) Title 6, Chapter 4, and listed below:

1. The ability, capacity and skill of the Respondent to perform the contract or provide the service required,
2. Whether the Respondent can perform the contract or provide the service promptly or within the time specified, without delay or interference,
3. The character, integrity, reputation, judgment, experience and efficiency of the Respondent,
4. The quality of performance by Respondent of previous contracts or services,
5. The previous and existing compliance by the Respondent with laws and ordinances relating to the contract or service,
6. The sufficiency of the financial resources and ability of the Respondent to perform the contract or provide the service,
7. The quality, availability and adaptability of the Services offered by Respondent to the particular use required,
8. The ability of the Respondent to provide future maintenance, support and service related to Respondent's offer,
9. Where an earlier delivery date would be of great benefit to the Using Department, the date and terms of delivery may be considered in the Proposal award,

10. The degree to which the Proposal submitted is complete, clear, and addresses the requirements in the CSP request specifications,

11. If a point system has been utilized in the CSP request specifications, the number of points earned by the Respondent.

12. The total cost of ownership, including the costs of supplies, materials, maintenance, and support necessary to perform the item's intended function.

13. If an evaluation committee performs the evaluation, the recommendation of such committee.

XI. MISCELLANEOUS:

- A. Your response to this CSP request will be considered part of the contract, if one is awarded to you.
- B. All data included in this CSP request, as well as any attachments, are proprietary to the City of Tulsa.
- C. The use of the City of Tulsa's name in any way as a potential customer is strictly prohibited except as authorized in writing by the City of Tulsa.
- D. Your proposal must clearly indicate the name of the responding organization, including the Respondent's e-mail address and web site information, if applicable, as well as the name, address, telephone number and e-mail address of the organization's primary contact for this proposal. Your proposal must include the name, address, telephone number and e-mail address of the Respondent and/or team of Respondents assigned to the City account.
- E. The City is bound to comply with Oklahoma's Open Records Act, and information submitted with your proposal, with few exceptions, is a matter of public record. For specifics on the Oklahoma Open Records Act, see the link below:

<https://libraries.ok.gov/law-legislative-reference/library-laws/statutes-open-records/>

The City shall not be under any obligation to return any materials submitted in response to this CSP request.

The City expects to enter into a written Agreement with the chosen Respondent that will incorporate this CSP request and your proposal. In addition to any terms and conditions included in this CSP request, the City may include in the Agreement other terms and conditions as deemed necessary.

(THE REST OF THIS PAGE INTENTIONALLY LEFT BLANK)

INTEREST AFFIDAVIT

STATE OF _____)
) ss.
COUNTY OF _____)

I, _____, of lawful age, being first duly sworn, state that I am the agent authorized by Seller to submit the attached Proposal. Affiant further states that no officer or employee of the City of Tulsa either directly or indirectly owns a five percent (5%) interest or more in the Respondent's business or such a percentage that constitutes a controlling interest. Affiant further states that the following officers, including any Trustee, and/or employee of the City of Tulsa own an interest in the Respondent's business which is less than a controlling interest, either direct or indirect.

By: _____
Signature

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20____.

Notary Public
My Commission Expires: _____
Notary Commission Number: _____
County & State Where Notarized: _____

The Affidavit must be signed by an authorized agent and notarized

NON-COLLUSION AFFIDAVIT

(Required by Oklahoma law, 74 O.S. §85.22-85.25)

STATE OF _____)
) ss.

COUNTY OF _____)

I, _____, of lawful age, being first duly sworn, state that:

(Seller's Authorized Agent)

- 1. I am the authorized agent of Seller herein for the purposes of certifying facts pertaining to the existence of collusion between and among Respondents and municipal officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the Proposal to which this statement is attached.
- 2. I am fully aware of the facts and circumstances surrounding the making of Seller's Proposal to which this statement is attached, and I have been personally and directly involved in the proceedings leading to the submission of such Proposal; and
- 3. Neither the Seller nor anyone subject to the Seller's direction or control has been a party:
 - a. to any collusion among Respondents in restraint of freedom of competition by agreement to Propose at a fixed price or to refrain from responding,
 - b. to any collusion with any municipal official or employee as to quantity, quality, or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between Respondents and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

By: _____
Signature

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20____.

Notary Public

My Commission Expires: _____

Notary Commission Number: _____

County & State Where Notarized: _____

The Affidavit must be signed by an authorized agent and notarized

ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS

I hereby acknowledge receipt of the following addenda or amendments, and understand that such addenda or amendments are incorporated into the Bid Packet and will become a part of any resulting contract.

List Date and Title/Number of all addenda or amendments: (Write "None" if applicable).

Sign Here ►

Printed Name:

Title:

Date:

Exhibit A – Price Sheet Summary

Exhibit A must describe all costs of the proposal. A milestone payment plan must be submitted as part of each proposal. Milestone payments shall be paid based on completion of previously described progress points as agreed between the Respondent and the City. No milestone shall equal more than 10% of the total contract amount and must be associated with tangible deliverables.

Provide pricing specifics related to all services quoted in this CSP along with any implementation costs and exception items.

Include available discounts.

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 1	Lump Sum; Cost not-to-exceed	\$
2	System Implementation Services YEAR 1	Lump Sum; Cost not-to-exceed	\$
3	System Services Maintenance and Support Costs YEAR 1	Lump Sum; Cost not-to-exceed	\$
Total YEAR 1			\$

Pricing Detail

Software Cost Details YEAR 1 – *Indicate whether Unit cost is per user OR per site license.*

Item	Software Costs	Unit	Cost
1.1	Administrator User Licenses		\$
1.2	Finance User Licenses		\$
1.3	Project Manager User Licenses		\$
1.4	Project Team User Licenses		\$
1.5	Administrator User Licenses		\$
Total of All Section 1 Costs			\$

System Implementation Cost Details YEAR 1- *Indicate whether Unit cost is by number of users OR per hour.*

Item	Implementation Services Costs	Unit	Cost
2.1	Project Management		\$
2.2	Installation of Base Application		\$
2.3	Design		\$
2.4	Configuration		\$
2.5	Data Conversion		\$
2.6	Interfaces		\$
2.7	Reporting		\$
2.8	Application/System Testing		\$
2.9	Performance Testing		\$
2.10	Production Environment Installation		\$
2.11	Project Team Training		\$
2.12	System Documentation		\$
2.13	End User Training		\$
2.14	Acceptance Testing		\$
2.15	Deployment		\$
2.16	Post Implementation Support		\$
2.17	Other		\$
2.18	Other		\$
2.19	Other		\$
2.2	Other		\$
Total of All Section 2 Costs			\$

System Support Services Cost Details YEAR 1- *Indicate whether Units cost is per user OR per site license.*

Item	Support Costs	Unit	Cost
3.1	Training Services		\$
3.2	Application Support Services		\$
3.3	Database Support Services		\$
3.4	System Administration Services		\$
Total of All Section 3 Costs			\$

Respondents must detail the costs of training for additional users. Provide an estimated total training cost, including travel tickets, hotel, and meals per diem if applicable.

No.	Description	Fee
1	Price for additional training per class (Max 10 Persons)	
2	Travel expenses	
3	Hotel expenses	
4	Meals per diem if applicable	
Total		\$

Additionally, please provide a rate card detailing the costs for any additional services that may be required for future enhancements that fall outside of the standard maintenance and support agreement. Proposer is to provide a line item for each discipline available. The provider must describe any additional APPLICATION DEVELOPMENT that is required to meet the requirements of the City stated in that are not part of the proposed SYSTEM and are not included in the BASE SUPPORT of the PMSS.

Discipline	Per Hour Fee

Provide cost proposals for Years 2-5.

Company Name: _____

Date: _____

Signature: _____

Name Printed: _____

Title: _____

City of Tulsa General Contract Terms

It is anticipated that the City of Tulsa will enter into a contract with the selected Respondent for an initial term ending one (1) year from the date of its execution by the City's Mayor, with four (4) one-year renewals available at the option of the City. Contracts entered into by the City of Tulsa generally include, but are not limited to, the following terms:

1. **Renewals.** Contractor understands and acknowledges that any future contracts or renewals are neither automatic nor implied by this Agreement. The continuing purchase by City of the Services set forth in this Agreement is subject to City's needs and to City's annual appropriation of sufficient funds in City's fiscal year (July 1st to June 30th) in which such Services are purchased. In the event City does not appropriate or budget sufficient funds to perform this Agreement, this Agreement shall be null and void without further action by City.
2. **No Indemnification or Arbitration by City.** Contractor understands and acknowledges that City is a municipal corporation that is funded by its taxpayers to operate for the benefit of its citizens. Accordingly, and pursuant to Oklahoma law, City shall not indemnify nor hold Contractor harmless for loss, damage, expense or liability arising from or related to this Agreement, including any attorneys' fees and costs. In addition, Contractor shall not limit its liability to City for actual loss or direct damages for any claim based on a breach of this Agreement and the documents incorporated herein. City reserves the right to pursue all legal and equitable remedies to which it may be entitled. City will not agree to binding arbitration of any disputes.
3. **Intellectual Property Indemnification by Contractor.** Contractor agrees to indemnify, defend, and save harmless City and its officers, employees and agents from all suits and actions of every nature brought against them due to the use of patented, trademarked or copyright-protected appliances, products, materials or processes provided by Contractor hereunder. Contractor shall pay all royalties and charges incident to such patents, trademarks or copyrights.
4. **General Liability.** Contractor shall hold City harmless from any loss, damage or claims arising from or related to the performance of the Agreement herein. Contractor must exercise all reasonable and customary precaution to prevent any harm or loss to all persons and property related to this Agreement.
5. **Liens.** Pursuant to City's Charter (Art. XII, §5), no lien of any kind shall exist against any property of City. Contractor agrees to indemnify and hold the City harmless from all claims, demands, causes of action or suits of whatever nature arising out of the services, labor, and material furnished by Contractor or Contractor's subcontractors under the scope of this Agreement.
6. **No Confidentiality.** Contractor understands and acknowledges that City is subject to the Oklahoma Open Records Act (51 O.S. §24A.1 *et seq.*) and therefore cannot assure the confidentiality of contract terms or other information provided by Contractor pursuant to this Agreement that would be inconsistent with City's compliance with its statutory requirements there under.
7. **Compliance with Laws.** Contractor shall be responsible for complying with all applicable federal, state and local laws. Contractor is responsible for any costs of such compliance. Contractor shall take the necessary actions to ensure its operations in performance of this contract and its employment practices are in compliance with the requirements of the Americans with Disabilities Act. Contractor certifies that it and all of its subcontractors to be used in the performance of this agreement are in compliance with 25 O.S. Sec. 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. Sec. 1313 and includes, but is not limited to, the free Employee Verification Program (E-Verify) available at www.dhs.gov/E-Verify.
8. **Right to Audit.** The parties agree that books, records, documents, accounting procedures, practices, price lists or any other items related to the Services provided hereunder are

subject to inspection, examination, and copying by City or its designees. Contractor shall retain all records related to this Agreement for the duration of the contract term and a period of three years following completion and/or termination of the contract. If an audit, litigation or other action involving such records begins before the end of the three year period, the records shall be maintained for three years from the date that all issues arising out of the action are resolved or until the end of the three year retention period, whichever is later.

9. **Governing Law and Venue.** This Agreement is executed in and shall be governed by and construed in accordance with the laws of the State of Oklahoma without regard to its choice of law principles, which shall be the forum for any lawsuits arising under this Agreement or incident thereto. The parties stipulate that venue is proper in a court of competent jurisdiction in Tulsa County, Oklahoma and each party waives any objection to such venue.
10. **No Waiver.** A waiver of any breach of any provision of this Agreement shall not constitute or operate as a waiver of any other provision, nor shall any failure to enforce any provision hereof operate as a waiver of the enforcement of such provision or any other provision.
11. **Entire Agreement/No Assignment.** This Agreement and any documents incorporated herein constitute the entire agreement of the parties and supersede any and all prior agreements, oral or otherwise, relating to the subject matter of this Agreement. This Agreement may only be modified or amended in writing and must be signed by both parties. Notwithstanding anything to the contrary herein, the City does not agree to the terms of any future agreements, revisions or modifications that may be required under this Agreement unless such terms, revisions or modifications have been reduced to writing and signed by both parties. Contractor may not assign this Agreement or use subcontractors to provide the Goods and/or Services without City's prior written consent. Contractor shall not be entitled to any claim for extras of any kind or nature.
12. **Equal Employment Opportunity.** Contractor shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination

The undersigned agrees to the inclusion of the above provisions, among others, in any contract with the City of Tulsa.

Company Name: _____

Date: _____

Signature: _____

Name Printed: _____

Title: _____

Attachment A – References

By submitting required references with a proposal, Respondents are confirming references are accurate and comprehensive, so that members of the evaluation committee will have the accurate information to contact such references. Any references found to be inaccurate or incomplete may result in proposal rejection.

REFERENCE NUMBER 1

Company Name:	
Address (include City, State, and Zip):	
Contact person with the company:	
Telephone number for the person listed above:	
Email address for the contact person:	
1) How long has this reference been your customer?	
2) What is the size of this customer's annual capital program?	
3) What software did you provide this customer?	
4) What types of services did you provide for this customer?	
5) How long did the project take from notice to proceed to "go-live"?	
6) Describe the type of work provided for this reference.	

Attachment A – References

REFERENCE NUMBER 2

Company Name:	
Address (include City, State, and Zip):	
Contact person with the company:	
Telephone number for the person listed above:	
Email address for the contact person:	
1) How long has this reference been your customer?	
2) What is the size of this customer's annual capital program?	
3) What software did you provide this customer?	
4) What types of services did you provide for this customer?	
5) How long did the project take from notice to proceed to "go-live"?	
6) Describe the type of work provided for this reference.	

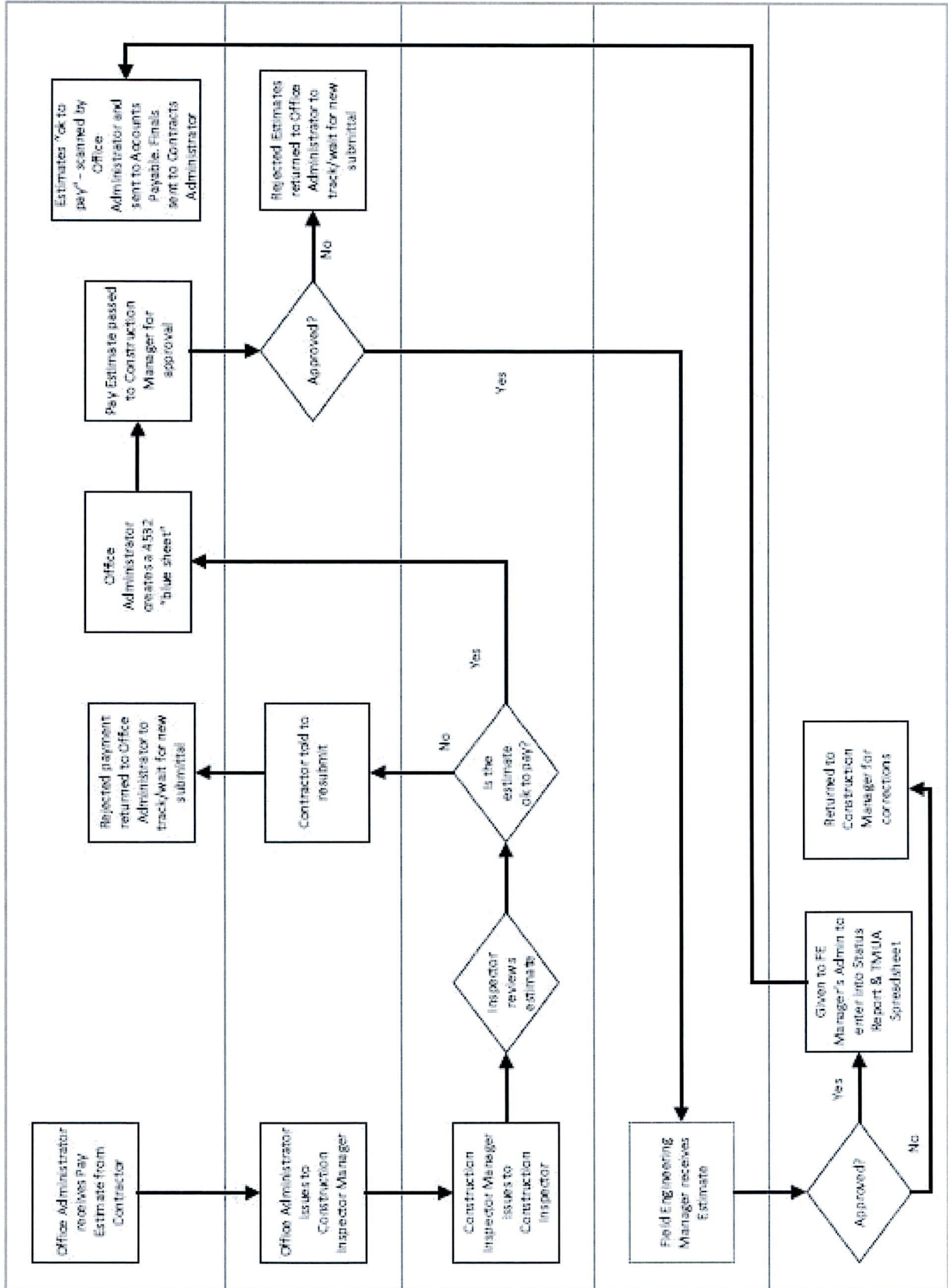
Attachment A – References

REFERENCE NUMBER 3

Company Name:	
Address (include City, State, and Zip):	
Contact person with the company:	
Telephone number for the person listed above:	
Email address for the contact person:	
1) How long has this reference been your customer?	
2) What is the size of this customer's annual capital program?	
3) What software did you provide this customer?	
4) What types of services did you provide for this customer?	
5) How long did the project take from notice to proceed to "go-live"?	
6) Describe the type of work provided for this reference.	

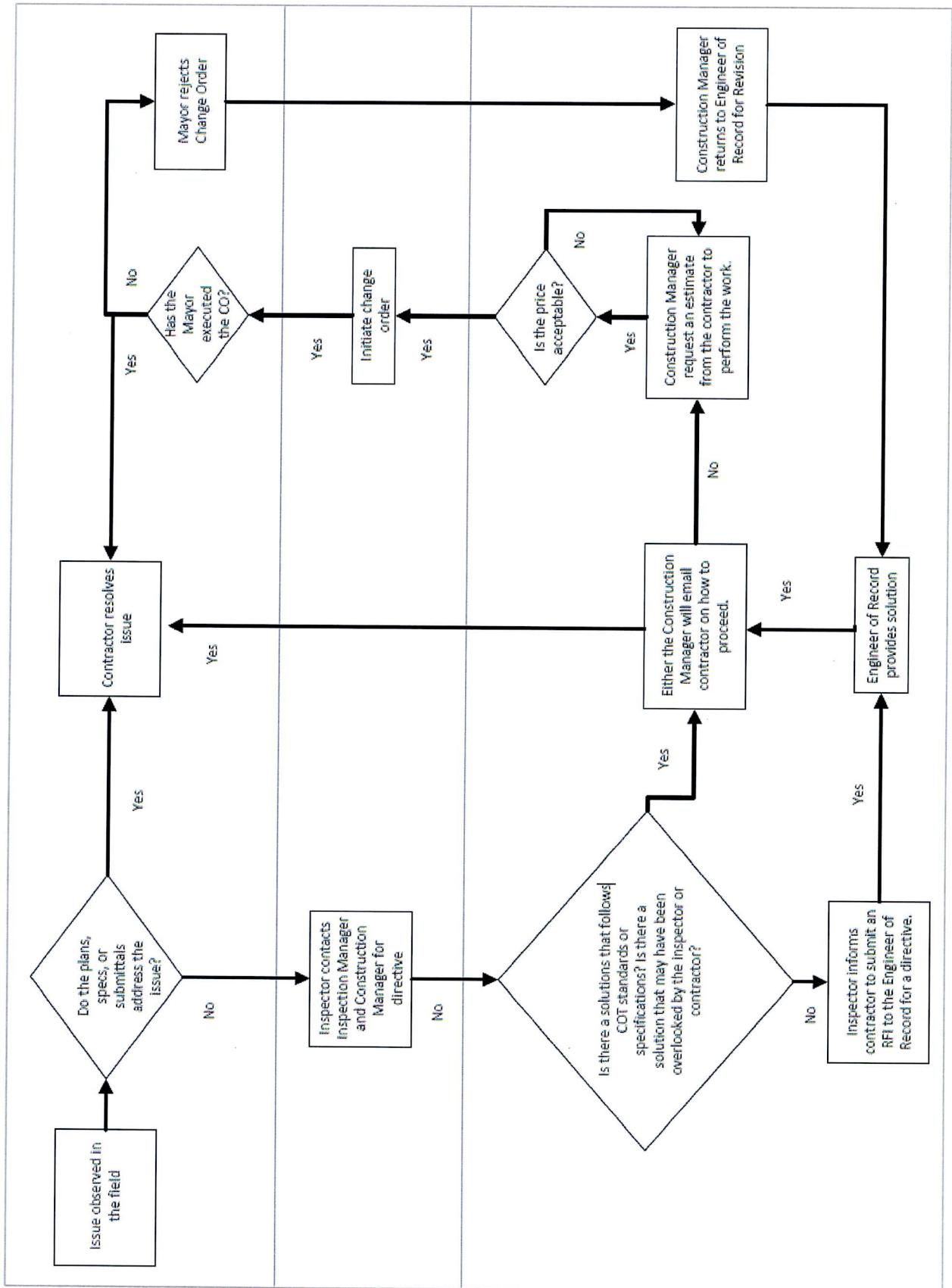
Attachment B – Process Diagrams

Partial Payment Process



Attachment B – Process Diagrams

Change Order Process



Attachment C- Questionnaire

Date: _____

Note: "Must-Haves" captured in **Bold**. "Nice-To-Haves" not emboldened.

1 Product Functionality		Yes	No	Comment
1.1 Document Management				
1.1.1	Does the proposed solution have the ability to create document folders as needed to collect project documentation on a project by project basis?			
1.1.2	Does the proposed solution have the ability to close/lock documents stored in system as well as assign this ability to certain roles?			
1.1.3	Does the proposed solution have uploading capabilities for plans including "red lining" of changes in computer aided design (CAD), Autodesk Revit, Adobe Acrobat (PDF) and/or building information modeling (BIM) documents?			
1.1.4	Does your tool offer ability to view, markup and collaborate on PDFs and/or BIM drawings?			
1.1.5	Does your document management tool have ability to store different versions of the same file, while ensuring users always access the most current version of the file?			
1.2 Schedule				
1.2.1	Does the program have interactive scheduling with project management that will track scheduling milestone information as well as the versions of the baseline schedule, planned schedule, and actual schedule?			
1.2.2	Can a schedule template be created and utilized as a baseline schedule for a project?			
1.2.3	Can an existing project schedule from another scheduling tool be imported to be managed within the proposed solution? If so, which ones?			
1.2.4	Can schedules be uploaded by end users?			
1.2.5	Does your system have ability to create tasks within a schedule and assign the task to a user?			
1.2.6	Does your system have ability to edit, remove, and add changes to schedule tasks for a project?			
1.2.7	Does the proposed solution provide a CPM-type scheduling component that automatically updates the entire schedule as tasks are updated or changed?			
1.2.8	Can the schedule track and graphically show the critical path?			

Attachment C- Questionnaire

1.2.9	Can the following constraint types be assigned to a task (start-to-finish, start-to-start, finish-to-finish, finish-to-start)?			
1.2.10	Can users create schedule templates within your system and then apply the schedules to multiple projects?			
1.2.11	Can schedule templates be revised by client personnel without involving technical support?			
1.2.12	Can schedule tasks be marked as complete in the field or in the office?			
1.2.13	Does your system handle schedule management, including input and edit planned, baseline, and actual dates?			
1.2.14	Does the proposed system send notifications to alert project team partners to changes of schedule task status?			
1.2.15	Does your system have ability to report on planned vs. actual schedule dates that shows the variance?			
1.2.16	Can your scheduling tool show the schedule in different formats, such as calendar layout or Gantt chart?			
1.2.17	Does your system have ability to send notifications to project team members to keep them aware of due dates?			
1.2.18	Does your reporting tool show schedule statuses for several projects in one report?			
1.2.19	Can a project schedule link into the cost management module of the proposed solution? If yes, can a task be assigned to budget line items to calculate the project cash flow projection based upon the current schedule?			
1.2.20	Can the proposed solution generate reports that combine schedule data with cost data and other project data across multiple projects in one report?			
1.3	Shop Drawing Submittal (SDS) & Request For Information (RFI)	Yes	No	Comment
1.3.1	Does the product have the ability to create a SDS and RFI from the office or field?			
1.3.2	Can users upload attachments (pictures, pdf, etc.) directly in the SDS and RFI items?			
1.3.3	Do your SDS and RFI tools facilitate dialogue and collaboration and have ability to view communication history?			
1.3.4	Does your system send notifications for SDS and RFI creation, edits, and completion?			

Attachment C- Questionnaire

1.3.5	When SDS and RFIs are initially created, does the system automate routing to an assigned role or user?			
1.3.6	Does the system send out overdue notices for SDS and RFIs that have exceeded the allotted time?			
1.3.7	Does the system display a dashboard with SDS and RFI statuses by project and by program?			
1.3.8	Does the system offer advanced reporting features to allow for all sorts of data analysis by project and by program?			
1.3.9	Can RFIs that drive financial changes in a project be linked to the associated change order?			
1.3.10	Does your system provide integration with contractor-focused construction management tools to import RFIs and export RFI responses?			
1.4	Change Order	Yes	No	Comment
1.4.1	Does your system of the ability to track potential change orders?			
1.4.2	Can a potential change order in your system reference existing RFIs with an estimated value impact and change orders?			
1.4.3	Can a potential change order in your system be created that does not reference an existing RFI?			
1.4.4	Does the potential change order tool in your system have ability to attach background documentation (pictures, pdf, etc.)?			
1.4.5	Does the potential change order tool in your system have ability to reject potential change orders?			
1.4.6	Does the potential change order tool in your system have ability to request clarification for the submitter to provide more information?			
1.4.7	Does the potential change order tool in your system have ability to send notifications upon creation, request for approval, and final approval?			
1.4.8	Does your system have a dashboard that displays statuses of potential change orders by project and by program?			
1.4.9	In your system can a change order reference an RFI or a Potential Change Order?			
1.4.10	Can a change order be created without referencing an RFI or Potential Change Order?			
1.4.11	Upon approval of a change order, is the budget tool updated to reflect the value updates at a line item level?			
1.4.12	Can backup documentation be attached to change order transactions?			
1.4.13	Does your change order tool have the ability to reject change orders?			

Attachment C- Questionnaire

		Yes	No	Comment
1.4.14	Does your system include ability to request clarification on a change order to allow submitter to provide more information?			
1.4.15	Does your system send system notifications of change order submittal, review, approval, and status?			
1.4.16	Does your system offer a dashboard that displays statuses of change orders for one project or many?			
1.5 Pay Applications				
1.5.1	Does your system allow external partners to create pay applications at a line item level for their contracts?			
1.5.2	Does your invoicing tool allow users to upload required attachments?			
1.5.3	Does your invoicing tool allow users to upload supporting documentation in the pay application?			
1.5.4	Does your system calculate and hold and display retainage from payments based on retainage percent defined within the contract?			
1.5.5	Can your system to have multiple approvers based on dollar amount of transaction for pay applications?			
1.5.6	Does your approval process have the ability to reject payment applications?			
1.5.7	Does your approval process have the ability to request clarification on a payment application to allow submitter to provide more information?			
1.5.8	Does your system send notifications of payment application submittal, review, approval, and status?			
1.5.9	Does the system adjust open commitments and actuals for project based on the approval of the payment application?			
1.5.10	Does your invoicing tool have a validation check that payment amount requested at a line item level cannot exceed the committed amount of that cost code line item (contract and approved change orders)?			
1.5.11	Does your system display the payment status after final approval of payment requests?			
1.5.12	Does your invoicing tool provide capability for vendors, architects, contractors, etc. to enter payment request information and upload invoices with supporting documentation over the internet into the system?			
1.5.13	Does your invoicing system have the ability to require payroll documents as part of the submittal, such as Davis Bacon or other federal, state or local documents?			

Attachment C- Questionnaire

1.6 Corrective Action List / Punchlist		Yes	No	Comment
1.6.1	Does your system have the ability to track items that need corrective actions?			
1.6.2	Can the unfinished corrective action items be rolled into a project punchlist?			
1.6.3	Does your system facilitate creation of a punchlist via manual entry?			
1.6.4	Can a punchlist be created from a list of identified items once an area has reached construction complete?			
1.6.5	Does your software allow users to add or modify punchlist attributes, including area, trade, asset, description, title, completion eta, etc.?			
1.6.6	Does your system send notifications of overdue items, or approaching due items, and assigned items in the punchlist tool?			
1.6.7	Can users upload attachments, such as pictures, pdf etc. in your punchlist tool?			
1.6.8	Does your software have a Punchlist Dashboard that displays statuses of punchlist items by project and by program?			
1.6.9	Can the reporting tool in your product run punchlist reports that can be used to filter/sort data for all sorts of different data analysis by project and by program?			
1.6.10	Can your software's reporting tool download all attributes and relevant information of all punchlist items by project?			
1.7 Contracts		Yes	No	Comment
1.7.1	Does your system allow for tracking of contracts and contract expenditures against budget line items as well as general contract information and work flow approvals as designed by Client for payments, contract amendments, proposed change orders (PCOs), and change orders (COs)?			
1.7.2	Does your contract tool include the ability to create a contract with or without bidding?			
1.7.3	Can a predefined list of common attributes be created and leveraged quickly to create multiple contracts within the system?			
1.7.4	Can your system create and print a document based on boiler plate language that leverages data from the contract?			
1.7.5	Does your contract tool allow attaching documentation to a contract?			
1.7.6	Does your contract tool include such attributes as contract fee, change order fee, contract type, cost type, retainage, etc.?			

Attachment C- Questionnaire

1.7.7	Does your system have the ability to print or save contract information in a PDF format?			
1.7.8	Does the budget tool in your system get automatically updated when contracts are created in the system?			
1.7.9	Does your system include the ability to reject contracts?			
1.7.10	Does your system offer ability to request clarification on a contract to allow submitter to provide more information?			
1.7.11	Does your system send notifications of contract submittal, review, approval, and status?			
1.8 Bid Management		Yes	No	Comment
1.8.1	Does your bidding tool enable bidders to enter their bid submissions at a line item level?			
1.8.2	Does your bidding tool enable bidders to submit attachments and supporting documentation with their bid response?			
1.8.3	Does your bidding tool enable comparison of received bids based on different metrics?			
1.8.4	Does your bidding tool have the ability to use cost code values from winning bid to create contract?			
1.8.5	Does your system send notifications when a bidding is open, closed, and awarded?			
1.8.6	Does your system have the ability to create a bidding template at a line item level in one location that can be used in several locations?			
1.8.7	Upon receipt of bid information, does your bidding tool have the ability to print or save bid information in a PDF format to print?			
1.8.8	Does your system have a dashboard that displays statuses of bids by project and by program?			
1.8.9	Does your software have reporting capabilities for the bidding tool that can be used to filter/sort data for all sorts of different data analysis by project and by program?			
1.9 Reporting		Yes	No	Comment
1.9.1	Does your system have a reporting system that is open and able to produce real-time reporting?			
1.9.2	Does the report only show the data a user has access to based on the users permissions?			
1.9.3	Does the proposed solution provide a report folder hierarchy for the categorization of report (e.g., Daily Logs, Monthly, Quarterly)			

Attachment C- Questionnaire

1.9.4	Does the proposed solution provide dashboard capability for graphical reporting?			
1.9.5	Can multiple dashboards be built by users and administrators (e.g., Program Level, Project Level)?			
1.9.6	Can users design reports to suit their needs with no extraneous information?			
1.9.7	Can security access be set to limit who can see certain dashboards?			
1.9.8	Does the graphical dashboard reflect data in real-time?			
1.9.9	Can users click on links in the report to drill down into detail project record information pertaining to the report?			
1.9.10	Can the proposed solution filter on date ranges in report results? If yes, can the results be filtered based on a defined fiscal period?			
1.9.11	Does the proposed solutions' reporting tool allow a user to create Daily Reports from Construction Manager, Inspector of Record (IOR), Contractor, Subcontractor, etc.?			
1.9.12	Can the reporting tool create weekly reports for different roles, e.g., construction manager, project manager, executive, etc.			
1.9.13	Can the proposed solution allow users to create Project Status Reports?			
1.9.14	Can the proposed solution allow users to create reports for Logs tracking RFIs, ASIs, Fls, CRBs, CORs, COs, Reports from Users, Requests for inspection and testing, etc.?			
1.9.15	Does your program have designed management reports that can comply with weekly, monthly, and quarterly reporting requirements?			
1.9.16	Are we able to build our own reports without incurring extra cost or assistance?			
1.9.17	Do we receive a full suite of reports with the product?			
1.9.18	Can reports be automated to generate and send according to a set schedule?			
1.9.19	How many templated reports do you provide?			
1.9.20	Do we have the ability to pull our own data to create custom reports?			
2 Technical Requirements				
2.1 Availability				
2.1.1	Does the proposed product offering provide Client database access 24 hours a day, 7 days a week subject to scheduled maintenance downtime and any emergency force majeure events?	Yes	No	Comment

Attachment C- Questionnaire

2.1.2	What are the offered contractual availability levels?			
2.1.3	Is there a daily, weekly or monthly outage window required for the system or parts of system functionality? If yes, when, how long, and are outages full or partial?			
2.1.4	Are there full or partial outages for patching or upgrades? If yes, what is the frequency, duration, and ability to schedule those outages?			
2.1.5	Do background processes (work order, PO, batch jobs) make any functionality unavailable or slow for end users?			
2.1.6	Please explain the high-availability mechanism(s)/architecture. Will there be any impact to end users or batch processes (if any) or API calls during failover?			
2.1.7	Have you ever had to rollback a production change? If yes, tell us about that and client impact?			
2.1.8	How do outside sources interact with your software (3rd party contracting companies working with Client)? Can we manage them as team members?			
2.2	Data Security	Yes	No	Comment
2.2.1	Does your software maintain Client data to include daily back-ups of Client database on the vendor-managed secure servers?			
2.2.2	Is server maintenance and server technical support related to the software available during regular business hours?			
2.2.3	Do you provide maintenance of software functionality and database physical integrity?			
2.2.4	Does the secure datacenter perform automatic program and related third-party software updates, enhancements, modifications, and improvements at no additional cost to Client?			
2.2.5	When scheduling planned downtime, is there an interruption of the service during extended normal business hours and during potential peak demand periods?			
2.2.6	What level of administrative data access is provided with this product? Please describe. If based on package pricing or module please detail the cost for this level of access.			
2.2.7	What level of access does your software need into the Client data systems (i.e. Admin, View-only)?			
2.2.8	What is the process and format for us to extract all data if we decide to terminate our subscription?			

Attachment C- Questionnaire

2.2.9	Describe the audit trail functionality in the software.			
2.3	Compatibility	Yes	No	Comment
2.3.1	Is the proposed web-based application software compatible with multiple current internet browsers such as, Safari, Chrome, Firefox, Edge, etc.?			
2.3.2	What does your company provide to better assist disabled users?			
2.3.3	What is the import and export ability from the product?			
2.3.4	Does the software have a preferred browser? Such as Chrome, Firefox, IE?			
2.3.5	Does your platform work on PC and Mac?			
2.3.6	Does your platform work on Android and iOS Devices? Is it a browser or App?			
2.4	Architecture	Yes	No	Comment
2.4.1	Describe your architecture in detail.			
2.4.2	Describe your mobile architecture, with a focus on security: Do you push/force version upgrades and mobile app updates? How is 3rd party functionality and data presented?			
2.4.3	Describe any processes in your solution that are not real-time (e.g. batch, background/queue).			
2.4.4	What latency should be expected for users across the country and on the other side of the globe?			
2.4.5	Does the proposed solution provide a system with requisite firewalls, partitioning, and other features intended to protect against accidental or intentional mingling of Client and its contractors' data with any other clients using or having access to the application, hosting software, or equipment?			
2.4.6	What are your storage limitations?			
2.5	Data Retention	Yes	No	Comment
2.5.1	What is the expected recovery time?			
2.5.2	How frequently are exercises conducted?			
2.5.3	Is any manual intervention needed?			
2.5.4	Provide RPO/RTO details.			
2.5.5	Please explain your backup and retention policies.			
2.5.6	What are your retention structures and policies?			

Attachment C- Questionnaire

3 Services				
3.1 Implementation		Yes	No	Comment
3.1.1	How soon after contract signing can implementation begin?			
3.1.2	Over the last five years, what percentage of your clients implemented your solution to manage construction projects?			
3.1.3	As risk is always a factor in software implementations, describe how your organization will ensure the proposed solution is implemented on time and to our satisfaction. If changes need to be made during implementation, how would you accommodate our request?			
3.1.4	How quickly can the complete system (including cost, schedule, document management, business process/workflow and reporting) be deployed?			
3.1.5	What is involved in / provided in implementation? Are there onsite visits during implementation, and if so, are those at a cost?			
3.1.6	Do you setup a test site and production site for us to use? If not, how do you handle testing and training prior to go live?			
3.2	Training	Yes	No	Comment
3.2.1	What type of documentation is provided as part of the solution deployment?			
3.2.2	Describe your company's training program for our new employees.			
3.2.3	Do you plan to use sub-contractors or other partners to fulfill the requirements of this contract? If yes, please list their specific roles and responsibilities.			
3.2.4	How many hours of user group instruction on the use of the system are included in the proposal?			
3.2.5	What training materials either online or published are included?			
3.2.6	What training do you provide during implementation for each user level?			
3.2.7	Do you provide live, onsite training classes?			
3.2.8	Do you have an annual user conference?			
3.2.9	Do you provide an account manager after implementation? Is there an extra cost for this service?			
3.3	Support	Yes	No	Comment

Attachment C- Questionnaire

3.3.1	Does the proposed solution provide post-implementation support from a program administrator readily available that will ensure that the first months' cycle runs smoothly? Will he or she provide long-term and follow-up training to Client staff as well as train a designated system management team on the use of the system to enable them to be the first line of troubleshooting any IT problems that might occur?		
3.3.2	Does the proposed vendor offer optional maintenance of the database on an as-requested basis once post-implementation period ends?		
3.3.3	How does the proposed vendor address issues that may arise for end users during regular business hours, e.g. help desk, support, or program functionality technical services? Please provide contact information. Does the proposed vendor have emergency support available after hours?		
3.3.4	What is the service level agreement for a plan of action to correct technical problems with appropriate response times from the time vendor becomes aware of the outage? Does the proposed support package provide regular notification and updates until known issues are corrected?		
3.3.5	How often do you upgrade and what is the process?		