9/25/23

REQUEST FOR CSP 24-902

Addendum #4

Please note the following changes which have been made for clarification to this Invitation for Sealed Bid. **This addendum must be listed as Addendum #4 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.

QUESTIONS/CLARIFICATION/CHANGES:

QUESTIONS:

1. Please clarify how many users, internal and external, are expected to use the new Project Management Software Suite.
    a. We see value and simplicity in an unlimited user license approach. With that said, it would be possible to achieve the goals with a user count approach. We have a preference for unlimited, but it is not a firm requirement. Pricing for the user license approach should be set for the quantities answered in this addendum.
    b. 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 will run through the selected platform. Roughly 150 internal users (55 inspector level, 10 Construction Manager level, the remaining would-be design/planning/GIS staff to assist with project correspondence). An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables. Contractors need access to update schedules, provide shop drawings, RFI's, Pay Applications and Bid Phase Services. Each project will involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.
2. Please provide the City's projected annual average capital spend for projects that will be managed with the Project Management Software Suite.
    a. Average Capital Expenditures range from $150M to $300M
3. Would the City consider an extension to the proposal due date if all questions are not answered by close of business on September 18th, 2023? Additional days may be needed to accommodate new information provided with answers, complete proposal reviews, and then print and ship for an early delivery.
    a. Yes. Amendment 3 extended the time.

How large is the department that would be utilizing this solution?
   a. The primary user department is Public Works. That department is around 450-500 people. Refer to the other questions around user base for that information.
2. Will contractors, vendors and agencies be accessing the integrated solution as directly and / or through mobile? If Yes, then how many users?
   a. Yes, Desktops, Tablets & Cellular Phones. User count is addressed in other similar questions in this addendum.
3. Will there be a need to access the integrated solution for record submission purposes only?
   a. The scope of the solution is larger than record submission/retention purposes so the access will extend beyond records. Could a user access this solution for record submission in that particular visit? Yes.
4. So one more question, but its OPC related: How many users will be performing remote schedule activity updates?
   a. For the purposes of this question, we're assuming that OPC means OLE (object linking and embedding) for process control which is a way for software from different companies to interact and exchange data. With that context, you're asking how many people are changing schedules from outside the new software solution? That answer depends on how you have integrated schedules within your software. Our preference is to have a single platform with all functionality within a single platform. In that situation, it would be a handful of new projects importing schedules from contractors and vendors then being updated in the software solution from there. If your software solution is to incorporate a separate scheduling system, then everyone would have to remotely schedule updates. Refer to the other questions around user base for that information.
5. Do you have a sense of the type of users grouped by their need?
   a. Primary - Field Engineering
      Primary - Planning,
      Primary - Design,
   b. Secondary - Real Estate/Right of Way
      Secondary - Utility Coordination
      Secondary – Asset Management,
      Secondary – Finance/Purchasing
   c. Tertiary – City Engineering Consultants
      Tertiary – City Contractors
   d. Quaternary - Street and Stormwater Operation
      Quaternary – Water & Sewer Operations
6. What is the City's ERP system?
   a. For the purposes of this question, we're assuming ERP is Enterprise Resource Planning. The City of Tulsa uses Tyler Technologies Enterprise ERP (Munis).
7. What level of access does the Engineering Services Department and other stakeholders have to the ERP?

      a. For the purposes of this question, we're assuming ERP is Enterprise Resource Planning. Individual Users have the permissions to view, edit, or create as appropriate for things like invoicing, reporting, and approvals. On a database level, we can read the SQL-database but we cannot write to the ERP database.

8. What is the City's preferred engineering / design software?
      a. We use Microstation with the ability to import AutoCAD for 2D drafting, ESRI ArcGIS for geospatial needs, and Bluebeam REVU and Adobe Acrobat for PDF needs.

9. Are contractor work products and documents (such as schedules and reports) provided as submittals?
      a. This is project dependent. We would like a document or record management system as part of the new software solution.

10. For contractor-submitted schedules are they being integrated into a larger master schedule or independently reviewed for compliance and archival?
      a. We would like the ability to import schedules from common sources into the master schedule within the new software solution. Exact project circumstances will dictate how any individual schedule is handled.

11. Will external parties, contractors, and vendors need to access document storage repositories?
      a. Yes, we envision a portion of the document library that is shared externally such as common files like the contractual info, project design, inspections, communications, and much more. We also envision a portion of the document library that is viewable only to internal members with the organization. This will require access controls through permissions.

12. What is the current strategy regarding Risk Management at the City of Tulsa?
      a. Fundamentally the city is risk averse. The details of our risk management strategy are held confidential so that we do not expose gaps to external elements. Access/Uptime, Security, and Backups are all important functions within this new software solution.

13. Would there be a need to migrate documents from SharePoint into the new integrated solution?
      a. Yes, we do have some documentation within Sharepoint and OneDrive that would need to be migrated over.

14. For OpSec, is there a requirement to self-host?
      a. Self-hosting is an option but not a requirement. We have other functions that serve as SaaS (Software as a Service) or other similar cloud based functionality. We do have to consider the additional costs of self-hosting.

15. If hosted solutions are allowed, are there any security requirements that need to be known beyond what is listed in Section 2 of the Questionnaire?
      a. Please outline what major steps you take in your responses to section 2. We will review the finalists answers with IT and may ask for clarification or additional information as part of the evaluation.

16. How many total schedulers would be in the system?
      a. Each Contractor and Project/Construction Manager would need access to the scheduling system.

17. How many users would need view-only access to schedules for review and reporting?
    a. All City staff with access should be able to view schedules with projects in which they are associated.
18. How many external users and contributors would be included in the system?
    a. An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables. Contractors need access to update schedules, provide shop drawings, RFI's, Pay Applications and Bid Phase Services. Each project will involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.
19. Does the City of Tulsa have boilerplate Word documents that can be adapted into custom print schema?
    a. As we look at implementation, we have some templates and plenty of branding/logo information. We would like to look at the defaults or standards other cities have used and see which portions we would like to customize to our current standards and which areas we should update to meet the new software.

1. Due to the requirements for paper responses, vendors will need to complete and ship proposals by Sep 25 (to meet Sep 27 deadline). Will questions be answered by Sep 18 giving vendors a week to incorporate into responses? Would City consider postponing response due date in considerations for Q&A process and timing?
    a. Yes, Amendment 3 extended the time.
2. Please outline budget allocated for this system and implementation. This would allow vendors to define appropriate level of software (with options) and service recommendations to match your budget limitations.
    a. The city is declining to disclose budget at this time.
3. Confirm desired approach would be for unlimited user licenses given the density of internal and external users expected.
    a. We see value and simplicity in an unlimited user license approach. With that said, it would be possible to achieve the goals with a user count approach. We have a preference for unlimited but it is not a firm requirement. Pricing for the user license approach should be set for the quantities answered in this addendum.
4. Would City accept a proposal whereby external users (contractors, consultants, etc.) would acquire a license directly from vendor (with City approval)?
    a. No
5. Does City prefer a configurable software with pre-defined UI forms or is there a preference for UI forms to customized?

a. We will start with the default configuration and try to stay within defaults as much as possible. We do want the ability to customize for circumstances that call for it.

6. How was an 8-month implementation process expectation arrived at? Does the City have a detailed scope of work plan to share spanning this type of span of time?

   a. This is an expectation based on similar platform implementations in the past. We will work with the vendor to develop this timeline. We do not want the implementation to exceed 10 months.

7. Does City desire to be 100% independent from the vendor after initial implementation? Whereby City can build out new projects and new project types/templates without vendor direct involvement?

   a. The City of Tulsa is unlikely to be 100% independent as long as we have that software. We do expect to be able to build out new projects and new project types/templates without vendor direct involvement.

8. Section V – Scope of Work describes project financial management needs:

   2. Ability to proactively perform capital budget planning and forecasting based on accurate, quality data collection

      a. Utilize information from recent bids to provide budgetary numbers

   3. Ability to track and view project financial reports such as budget variance report, contract variance report, contract summary report, and commitment summary report

      a. Track project from the planning and budgetary stage through design and construction for discrepancies and audit evaluation.

   However, only details for financial management found in Attachment C "Questionnaire" are for Change orders and PayApps. Should vendors propose full financial tracking services for capital plans, project budgets, contracts/PO's and analytics (such as cashflow)?

9. How many decision makers will be involved in picking the software?

   a. It is unclear at this time. We would expect a group of 5-8 but it may vary based on availability.

10. Does your Procurement Dept mandate you have to use their bidding system? Are you looking to integrate the software you select with your current bidding software?

    a. We do not currently have an electronic bidding system. We are exploring this platform as that basis.

11. How many people manage your CIP financials (i.e. funding sources, multiple phases, allocations) at the city?

    a. Up to seven individuals in Finance manage CIP financials.

12. What other software are you looking to integrate with the selected software? In previous RFP, this Scope of Work statement was made:

    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.*

Is integration with these systems now considered to be IN scope?

    a. This is a new RFP with new guidelines so that comment from the previous does not apply. The scope of work covered by this new software solution is within the scope of current Munis ERP and GIS needs. We cannot write to Munis but we will want to read from it for things like funding levels or to compare hours worked vs hours paid. For anything geospatial, we would like the new platform to be compatible with GIS so that we can pull projects into our existing GIS needs. Lucity is covering different scopes of work and is not applicable. We don't have a comprehensive records management system for projects outside of the above softwares. We would like to make this new platform the record management system for projects. With all of that said, we would like to ensure that data is available but we don't want to create a huge scope creep beyond the specifications in the RFP.

13. Are you looking to migrate data into the new software? If so, please provide some level of details on current dataset (format, structure, density, etc.). Would a migration toolkit suffice or should vendor assume City wants a "turn-key" migration?

    a. Current datasets are a combination of Excel files, Photos, PDF's, and Project Schedules

14. What API functionality do all of your current software have? Does City have API development skills in-house?

    a. We have several hundred types of software in the city. The two software's of principle concern are Tyler ERP and ESRI ArcGIS. Tyler ERP or Munis does NOT have an API for the information of concern. ESRI does have a variety of API's and SDK's to make data available. Lucity data is available too if we need it. The city does have some API developers but we would prefer to have the solution provider help us with commissioning.

15. Your evaluation criteria don't take into account private cloud offerings. How can we have the offering of a private cloud factored into the evaluation criteria and scoring under Data Security?

    a. Please outline what major steps you take in your responses to section 2. We will review the finalists answers with IT and may ask for clarification or additional information as part of the evaluation. Currently, 20 points of 100 are available for Availability, Data Security, Compatibility, Architecture, and Data Retention.

16. Bidder's Conference Recoding available?

    a. No

17. Transcription of Questions from Bidders' Conference available?

    a. No

During the discussion yesterday it was mentioned that there would 300-500 users of the software. Did that include consultants working on projects with the City of Tulsa?

We have simplified the user count to 150 internal and 100 external users.

If it did can you provide an approximate number of internal users that would need read/write access
Would there be some internal users that would just be approving information, if that's the case what is that approximate number
Approximate number of consultants using the software

An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables.

The cost structure you sent over broke the licenses up in 4 areas: Administrator User Licenses; Finance User Licenses; Project Manager User License; Project Team User License.

Since our structure would be:
- Read/Write User Licenses
- Approval License
- Consultant License

Just wondering how you might want that noted within the structure you provided?

a. We see value and simplicity in an unlimited user license approach. With that said, it would be possible to achieve the goals with a user count approach. We have a preference for unlimited, but it is not a firm requirement. Pricing for the user license approach should be set for the quantities answered in this addendum.

b. 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 will run through the selected platform. Roughly 150 internal users (55 inspector level, 10 Construction Manager level, the remaining would-be design/planning/GIS staff to assist with project correspondence). An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables. Contractors need access to update schedules, provide shop drawings, RFI's, Pay Applications and Bid Phase Services. Each project will involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.

1. Can you please confirm the number of users the City will have in the system? In the pre-proposal conference, we heard between 300 and 500 users. Should we base software pricing on 300 users?
   a. We see value and simplicity in an unlimited user license approach. With that said, it would be possible to achieve the goals with a user count approach. We have a preference for unlimited, but it is not a firm requirement. Pricing for the user license approach should be set for the quantities answered in this addendum.
   b. 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 will run through the selected platform. Roughly 150 internal users (55 inspector level, 10 Construction Manager level, the remaining would-be design/planning/GIS staff to assist with project correspondence). An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables. Contractors need access to update schedules, provide shop drawings, RFI's, Pay Applications and Bid Phase Services. Each project will involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.
2. What is the city of Tulsa's annual CIP budget?

   a. Average Capital Expenditures range from $150M to $300M
3. Please advise on question 2.1.2: What are the offered contractual availability levels? Is this referring to system up time? if not, please elaborate.
   a. Yes. This would be a Service Level Agreement or similar.
4. If we proposal a solution with MS Project integrating with the project management solution to develop baseline and forecast dates, cash flow, and schedule activity progress, would this be acceptable to the City or is the City specifically looking to replace MS Project as the source scheduling system with the future project management software suite?
   a. We would prefer an integrated solution and will compare your proposal against the other offerings. While we won't exclude a separated solution, other solutions may be more compelling upon review.

FWFS/PMWeb has the following questions in regard to CSP 24-902 Project Management Software Suite.

- How many users does the Engineering Services Department anticipate using the Software Suite?

    a.   We see value and simplicity in an unlimited user license approach. With that said, it would be possible to achieve the goals with a user count approach. We have a preference for unlimited, but it is not a firm requirement. Pricing for the user license approach should be set for the quantities answered in this addendum.

    b.   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 will run through the selected platform. Roughly 150 internal users (55 inspector level, 10 Construction Manager level, the remaining would-be design/planning/GIS staff to assist with project correspondence). An estimated 100 outside Engineering Consultants and Contractors would need access to the system. Engineering Consultants would need access for correspondence and project deliverables. Contractors need access to update schedules, provide shop drawings, RFI's, Pay Applications and Bid Phase Services. Each project will involve multiple personnel from the Engineering Consultant and the Contractor from specific aspects of design solutions and internal/external contractor staff.

    o   Of those users how many would be Administrators?
        a.   Planning, Design and Field Engineering will be working within the system. It would be anticipated a minimum od 2 Administrator level per division (6-10)
    o   How many would need to create and manage cost records and schedules
        a.   Each Contractor and Project/Construction Manager would need access to the scheduling system.
    o   How many would just need view access to the Software Suite?
        a.   All City staff with access should be able to view schedules with projects in which they are associated.
    o   How many external vendors does the Engineering Services Department work with annually?
        a.   Variable. We anticipate 100 (seats) outside Engineering Consultants and Contractors would need access to the system.
- Question 2.1.9 asks about geospatial data. Does the City of Tulsa currently use a Geospatial database?
        a.   Yes
    Is the City of Tulsa looking to integrate the Software Suite with a geospatial database?
        a.   Not required, however, it would be a bonus if provided.

CHANGES:

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 1 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
2	System Implementation Services YEAR 1	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 1	Lump Sum; Cost not-to-exceed	$
Total YEAR 1			**$**
YEAR 1 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 2 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 2	Lump Sum; Cost not-to-exceed	$
Total YEAR 2			**$**
YEAR 2 Unlimited user price (not to exceed)			

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Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 3 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 3	Lump Sum; Cost not-to-exceed	$
Total YEAR 3			**$**
YEAR 3 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 4 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 4	Lump Sum; Cost not-to-exceed	$
Total YEAR 4			**$**
YEAR 4 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 5 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 5	Lump Sum; Cost not-to-exceed	$
Total YEAR 5			**$**
YEAR 5 Unlimited user price (not to exceed)			

REQUEST FOR CSP 24-902

Addendum #3

Please note the following changes which have been made for clarification to this Invitation for Sealed Bid. **This addendum must be listed as Addendum #3 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.

QUESTIONS/CLARIFICATION/CHANGES:

CHANGES:

Was:

    V.   **INSTRUCTIONS FOR SUBMITTING A PROPOSAL:**

      A.   **General Requirements**

        1.   The proposal **must** be received by **5:00 p.m. on Wednesday, September 27, 2023, Central Standard Time.** Proposals must be sealed in an envelope or box clearly labeled **"CSP 24-902 Project Management Software Suite - Municipal Construction".**

        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 **September 15, 2023.**

Now:

    V.   **INSTRUCTIONS FOR SUBMITTING A PROPOSAL:**

      A.   **General Requirements**

        1.   The proposal **must** be received by **5:00 p.m. on Wednesday, October 11, 2023, Central Standard Time.** Proposals must be sealed in an envelope or box clearly labeled **"CSP 24-902 Project Management Software Suite - Municipal Construction".**

        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 **September 22, 2023**

9/7/23

<mark>**REQUEST FOR CSP 24-902**</mark>

<mark>Addendum #2</mark>

Please note the following changes which have been made for clarification to this Invitation for Sealed Bid. <mark>**This addendum must be listed as Addendum #2** on the</mark> 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.

QUESTIONS/CLARIFICATION/CHANGES:

CHANGES:

Under:

    I.   **INSTRUCTIONS FOR SUBMITTING A PROPOSAL:**

        B.   **General Requirements**

          7. **Mandatory Pre-proposal Meeting:** A mandatory pre-proposal meeting will be held on:

             <mark>**Thursday, September 14th at 10:00 AM CDT**</mark>

             <mark>**The meetings will be a Virtual TEAMS Meeting Only.**</mark>
             <mark>**Attendance is required for your proposal to be considered for an**</mark>
             <mark>**award.**</mark>

        If you are planning to attend this Virtual Meeting, please provide the names and emails of your attendees to the Project Buyer at: <mark>dtiemann@cityoftulsa.org</mark> by no later than Monday, September 11th.

        <mark>**A meeting invitation will be sent to you once your information has been received.**</mark>

Request for CSP 24-902

Addendum #1

Please note the following changes which have been made for clarification to this Invitation for Sealed Bid. **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.

QUESTIONS/CLARIFICATION/CHANGES:

ADDITIONS:

Under:

II. INSTRUCTIONS FOR SUBMITTING A PROPOSAL:

C. General Requirements

1. **Mandatory Pre-proposal Meeting:** A mandatory pre-proposal meeting will be held on:
   Thursday, September 14th at 10:00 AM CDT

   Attendance is required for your proposal to be considered for an award.

   The meetings will be held at: **175 E. 2nd St., Tulsa, Room 10 South**

8/23/22

Request for

Competitive Sealed Proposal

<mark>CSP 24-902</mark> Project Management Software Suite - Municipal Construction

NIGP Commodity Code(s):

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

<mark>**Submit proposals (sealed) to:**</mark>
Deputy City Clerk
City of Tulsa
175 E. 2ND St.
Suite 260
Tulsa, OK 74103

TABLE OF CONTENTS

III. __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

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IV. __INSTRUCTIONS FOR SUBMITTING A PROPOSAL:__

   __D.__   __General Requirements__

   1.   The proposal **must** be received by **5:00 p.m. on** <mark>**Wednesday, October 11, Central Standard Time.**</mark> Proposals must be sealed in an envelope or box clearly labeled **"**<mark>**CSP 24-902 Project Management Software Suite - Municipal Construction".**</mark>

   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 Project 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 <mark>**September 22, 2023**</mark>.

   Donny Tiemann, Project Buyer
   dtiemann@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.   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.

6. 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**

7. **Mandatory Pre-proposal Meeting:** A mandatory pre-proposal meeting will be held on:

<mark>**Thursday, September 14th at 10:00 AM CDT**</mark>

<mark>**The meetings will be a Virtual TEAMS Meeting Only.**</mark>

<mark>**Attendance is required for your proposal to be considered for an**</mark>

<mark>**award.**</mark>

If you are planning to attend this Virtual Meeting, please provide the names and emails of your attendees to the Project Buyer at: dtiemann@cityoftulsa.org by no later than Monday, September 11th.

<mark>**A meeting invitation will be sent to you once your information has been received.**</mark>

E. 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.

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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.

7. Seller and its subcontractors must obtain at Seller's expense and keep in effect during the term of the Purchase Agreement, including any renewal periods, policies of General Liability insurance in the minimum amounts set forth below and Workers' Compensation insurance in the statutory limits required by law.

General Liability: personal injury and property damage, each occurrence	$ 1,000,000.00
Auto Liability, each occurrence	$ 1,000,000.00
Workers' Compensation	(Statutory limits)

SELLER'S INSURER MUST BE AUTHORIZED TO TRANSACT BUSINESS IN THE STATE OF OKLAHOMA.

You will have 10 days after notification that your Bid was selected for contract award by City to provide proof of such coverage by providing the assigned Project Buyer, shown in the "INSTRUCTIONS FOR SUBMITTING A PROPOSAL" section of this document, with a Certificate of Insurance. The Certificate of Insurance must be completed with the following information:

   A. Your name
   B. Insurer's name and address
   C. Policy number

D. Liability coverage and amounts
E. Commencement and expiration dates
F. Signature of authorized agent of insurer
G. Certificate Holder Information: City of Tulsa, 175 East 2nd St., Suite 260, Tulsa, OK 74103

The Seller shall not cause any required insurance policy to be cancelled or to permit it to lapse. It is the responsibility of Seller to notify City of any change in coverage or insurer by providing City with an updated Certificate of Liability Insurance. Failure of Seller to comply with the insurance requirements herein may be deemed a breach of the Purchase Agreement. Further, a Seller who fails to keep required insurance policies in effect may be deemed to be ineligible to bid on future projects, ineligible to respond to invitations for bid, and/or ineligible to engage in any new purchase agreements.

V. <u>BACKGROUND:</u>

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.

VI. 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.**

VII. 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

VIII. DELIVERABLES:

The Respondent shall;

1) Provide and implement a robust, stable, secure, and user-friendly project management software solution.

2) Provide Implementation and Training plans.

3) Provide a mobile version of the application suitable to accomplish project management tasks on tablets or mobile phones.

IX. <u>**RESPONDENT AND PROPOSAL REQUIREMENTS:**</u>

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

A. One (1) unbound original and three (3) 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 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.

X. 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**

XI. 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.

XII.   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.

XIII. <u>MISCELLANEOUS:</u>

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, the City of Tulsa's general contract terms and conditions as listed in **Appendix A** will be included in any contract with the City of Tulsa.

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(THE REST OF THIS PAGE INTENTIONALLY LEFT BLANK)

AFFIDAVIT
NON-COLLUSION, INTEREST, AND CLAIMANT

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 Bidders 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 Bid to which this statement is attached, and I have been personally and directly involved in the proceedings leading to the submission of such Bid; and

3. Neither the Seller nor anyone subject to the Seller's direction or control has been a party:
    a. to any collusion among Bidders in restraint of freedom of competition by agreement to respond 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 Bidders and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

4. No officer or employee of the City of Tulsa either directly or indirectly owns a five percent (5%) interest or more in the Bidders business or such a percentage that constitutes a controlling interest. Affiant further states that the following officers and/or employees of the City of Tulsa own an interest in the Bidders business, which is less than a controlling interest, either direct or indirect.
_____

5. All invoices to be submitted pursuant to this agreement with the City of Tulsa will be true and correct.

6. That the work, services or material furnished will be completed or supplied in accordance with the plans, specifications, orders, requests or contract furnished or executed by the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employee of the City of Tulsa or of any public trust where the City of Tulsa is a beneficiary, of money or any other thing of value to obtain payment of the invoice or procure the contract or purchase order pursuant to which an invoice is submitted. Affiant further certifies that (s)he has complied with all applicable laws regarding equal employment opportunity.

By: _____
                           ==Signature==
Title: _____

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

_____
Notary Public

My Commission Expires: _____

Notary Commission Number: _____

RESPONDENT INFORMATION SHEET

Respondent's Legal Name: _____
<mark>(Must be Respondent's company name as reflected on its organizational documents, filed with the state in which Respondent is organized)</mark>

State of Organization: _____

Respondent's Type of Legal Entity: (check one)

☐ Sole Proprietorship   ☐ Limited Partnership
☐ Partnership   ☐ Limited Liability Partnership
☐ Corporation   ☐ Limited Liability Limited Partnership
☐ Limited Liability Company   ☐ Other: _____

Respondent's Address: _____
                             Street   City   State   Zip Code

Respondent's Website Address: _____

Sales Contact:	**Contact for Legal Notice:**
Name: _____	Name: _____
Title/Position: _____	Title/Position: _____
Street: _____	Street: _____
City: _____	City: _____
State: _____	State: _____
Phone: _____	Phone: _____
Email: _____	Email: _____

How did you learn about this business opportunity with the City of Tulsa?

☐ Email from Assigned Buyer
☐ City of Tulsa Website
☐ Tulsa World posting
☐ Purchasing search engine
☐ Industry colleague
☐ Other: Click or tap here to enter text.

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: (<mark>Write "None" if applicable</mark>).

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 1 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
2	System Implementation Services YEAR 1	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 1	Lump Sum; Cost not-to-exceed	$
Total YEAR 1			**$**
YEAR 1 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 2 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 2	Lump Sum; Cost not-to-exceed	$
Total YEAR 2			**$**
YEAR 2 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 3 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 3	Lump Sum; Cost not-to-exceed	$
Total YEAR 3			**$**
YEAR 3 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 4 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 4	Lump Sum; Cost not-to-exceed	$
Total YEAR 4			**$**
YEAR 4 Unlimited user price (not to exceed)			

Pricing Summary

Section	Description	Unit	Cost
1	Total Software Costs YEAR 5 150 internal users with user levels as necessary to run and maintain the software along with use it. 100 external users with user levels to enter, update, and read information.	Lump Sum; Cost not-to-exceed	$
3	Per User Costs for additional users YEAR 5	Lump Sum; Cost not-to-exceed	$
Total YEAR 5			**$**
YEAR 5 Unlimited user price (not to exceed)			

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

Company Name: _____   Date: _____

Signature: _____

Name Printed: _____

Title: _____

Appendix A   City of Tulsa General Contract Terms

It is anticipated that the City of Tulsa will enter into an Agreement 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.** Seller 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.** Seller 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 Seller harmless for loss, damage, expense or liability arising from or related to this Agreement, including any attorneys' fees and costs. In addition, Seller 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 Seller.** Seller 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 Seller hereunder. Seller shall pay all royalties and charges incident to such patents, trademarks or copyrights.

4. **General Liability and Indemnification.** Seller shall hold City harmless from any loss, damage or claims arising from or related to the performance of the Agreement herein. Seller must exercise all reasonable and customary precaution to prevent any harm or loss to all persons and property related to this Agreement. Seller 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 Seller or Seller's subcontractors under the scope of this Agreement.

5. **Liens.** Pursuant to City's Charter (Art. XII, §5), no lien of any kind shall exist against any property of City.

6. **No Confidentiality.** Seller 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 Seller pursuant to this Agreement that would be inconsistent with City's compliance with its statutory requirements there under.

7. **Compliance with Laws.** Seller shall be responsible for complying with all applicable federal, state and local laws. Seller is responsible for any costs of such compliance. Seller shall take the necessary actions to ensure its operations in performance of this contract and employment practices are in compliance with the requirements of the Americans with Disabilities Act. Seller 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. Seller 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 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. Seller may not assign this Agreement or use subcontractors to provide the Goods and/or Services without City's prior written consent. Seller shall not be entitled to any claim for extras of any kind or nature.

12. **Equal Employment Opportunity.** Seller 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

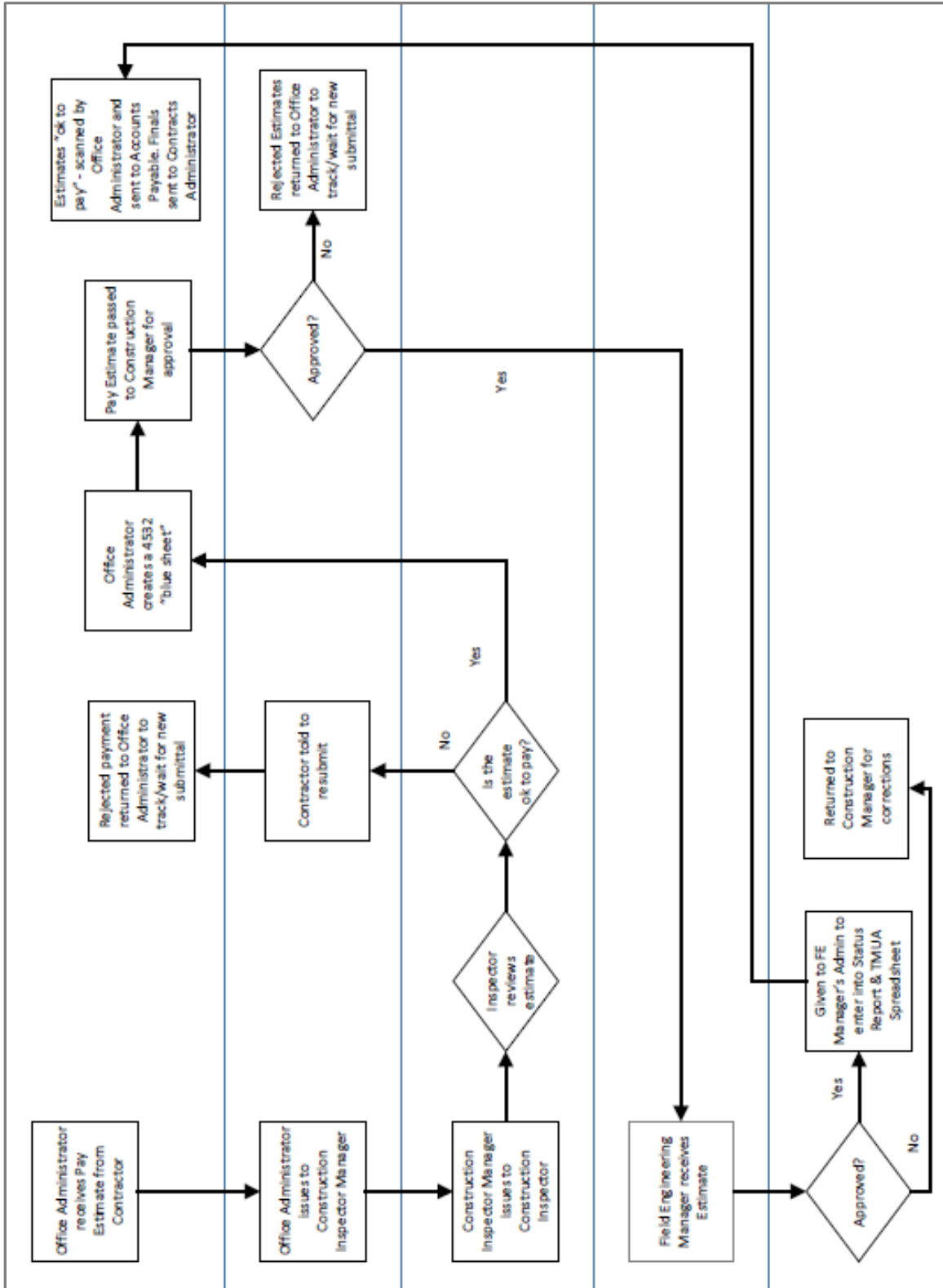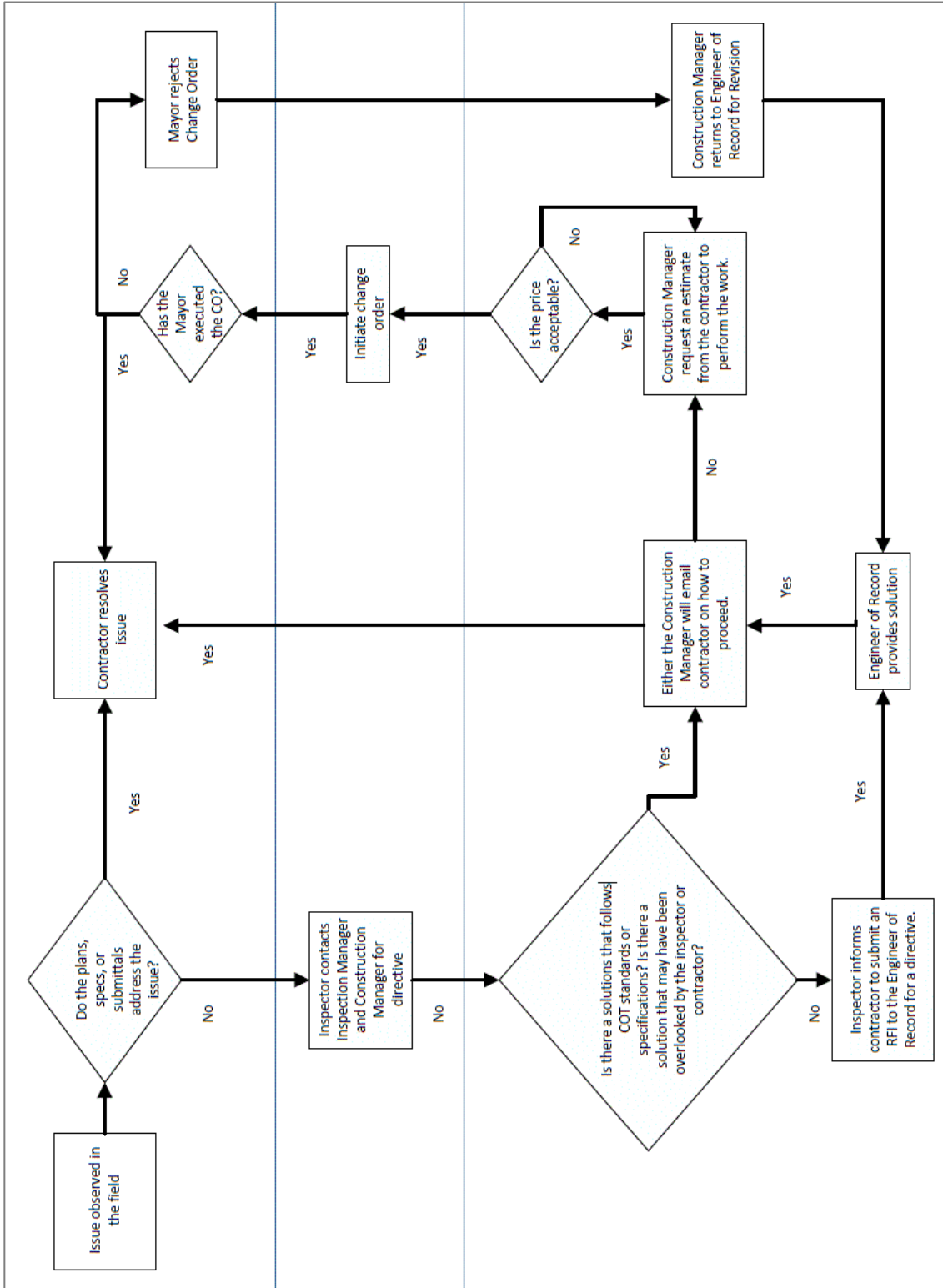|	
Company Name:	
Address **(include City, State, and Zip)**:	
Contact person with the company:	
Telephone number for the person listed above:	
Email address for the contact person:	
1) How long has this reference been your customer?	
2) What is the size of this customer's annual capital program?	
3) 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.	

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.

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)

Process Flow

Office Administrator receives Pay Estimate from Contractor →
Office Administrator issues to Construction Inspector Manager →
Construction Inspector Manager issues to Construction Inspector →
Inspector reviews estimate →
Is the estimate ok to pay?

- **No** → **Contractor told to resubmit** → **Rejected payment returned to Office Administrator to track/wait for new submittal**
- **Yes** → **Office Administrator creates a 4532 "blue sheet"** → **Pay Estimate passed to Construction Manager for approval** → **Approved?**
  - **No** → **Rejected Estimates returned to Office Administrator to track/wait for new submittal**
  - **Yes** → **Estimates "ok to pay" – scanned by Office Administrator and sent to Accounts Payable. Finals sent to Contracts Administrator**

Field Engineering Manager receives Estimate → **Approved?**
- **Yes** → **Given to FE Manager's Admin to enter into Status Report & TMUA Spreadsheet**
- **No** → **Returned to Construction Manager for corrections**

Attachment C- Questionnaire

1. Product Functionality

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?

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)

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?

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

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?
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?

1.6 Corrective Action List / Punchlist
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

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.?

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

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

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)

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, FIs, 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?

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?

2.1.9 9 Please explain how geospatial data is stored and made available. Are ESRI compatible geodatabases available to the client?

2.2 Data Security
  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?
  2.2.9 Describe the audit trail functionality in the software.

2.3 Compatibility
  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
  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
   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?

3. Services

1.1 Implementation
- 1.1.1 How soon after contract signing can implementation begin?
- 1.1.2 Over the last five years, what percentage of your clients implemented your solution to manage construction projects?
- 1.1.3 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?
- 1.1.4 How quickly can the complete system (including cost, schedule, document management, business process/workflow and reporting) be deployed?
- 1.1.5 What is involved in / provided in implementation? Are there onsite visits during implementation, and if so, are those at a cost?
- 1.1.6 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?

1.2 Training
- 1.2.1 What type of documentation is provided as part of the solution deployment?
- 1.2.2 Describe your company's training program for our new employees.
- 1.2.3 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.
- 1.2.4 How many hours of user group instruction on the use of the system are included in the proposal?
- 1.2.5 What training materials either online or published are included?
- 1.2.6 What training do you provide during implementation for each user level?
- 1.2.7 Do you provide live, onsite training classes?
- 1.2.8 Do you have an annual user conference?
- 1.2.9 Do you provide an account manager after implementation? Is there an extra cost for this service?

1.3   Support

1.3.1   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?

1.3.2   Does the proposed vendor offer optional maintenance of the database on an as-requested basis once post-implementation period ends?

1.3.3   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?

1.3.4   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?

1.3.5   How often do you upgrade and what is the process?

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