

CITY OF HILLSBORO



REQUEST FOR PROPOSALS

**For the acquisition of an
Asset Management, Work Order, and
Maintenance Management system
Software solution**

**DUE DATE AND TIME:
2:00PM (PST), JANUARY 8, 2010**

*City of Hillsboro
Information Services
150 East Main St Street, 3rd floor
Hillsboro, OR 97123
PHONE: (503) 681-5400*

**CITY OF HILLSBORO
REQUEST FOR PROPOSALS ("RFP")**

**For an
Asset Management, Work Order, and Maintenance Management system
Software solution**

Notice is hereby given the City of Hillsboro ("City") is requesting proposals for an Asset Management, Work Order, and Maintenance Management System software solution. The City desires to select an enterprise software solution that can be implemented through a phased implementation and budgeted approach. This solution will be implemented by City staff with possible vendor assistance depending on available and future funding. The software solution must be capable of integrating with the City's existing systems and technologies and be able to support and operate the City's Public Works, Water, Water Treatment Plant (WTP), Parks and Recreation, and Fleet and Facilities department's daily work operations. Although the City intends to select an enterprise software solution as part of this process, the City plans to only implement an initial phase of this project at this time. The initial phase includes implementing a GIS integrated utility infrastructure inventory, work order, and maintenance management solution specifically for the Public Works Department's Sanitary and Storm Utility Sewer team and the Water Department's Distribution team. In addition, the initial phase will also include implementing an equipment inventory, work order, and maintenance management solution for the Water Department's Water Treatment Plant team, the Parks and Recreation Department's Equipment Repair and Maintenance team, and the Public Works' Sign Inventory team.

It is the City's requirement that the system operate and integrate with the City's Tyler Technologies MUNIS financial system, ESRI based GIS system, and other related systems that currently support City operations as identified in this RFP. Additionally, it is the City's requirement that the software conform to the City's technical requirements which includes integrating and operating natively in a Microsoft based computing environment.

It is the City's further requirement that the proposed software solution have the capability to scale up to 100 users across multiple departments, support independent data operations between departments, operate in a mobile in-field environment, and at multiple City locations.

Responding bidders are requested to bid implementation service fees for ongoing implementation assistance and services as needed.

The City desires to enter into a contract with a qualified firm that can demonstrate competency and experience in system integration, software development and maintenance, training, system and technical support, and implementation services for an Asset Management, Work Order, and Maintenance Management system software solution.

RFP documents are available at <http://orpin.oregon.gov/open.dll/welcome>, please register and then sign in to obtain the bid documents. For additional information contact: Jay Leroux, Information Systems Manager, Information Services, 150 East Main Street, 3rd Floor, Hillsboro, OR 97123, Phone: 503-681-5420; facsimile: 503-681-5430, E-mail: jayl@ci.hillsboro.or.us

Sealed proposals must be received by **2:00PM (PST), JANUARY 8, 2010**, Information Services, 3rd Floor, 150 East Main Street, Hillsboro, Oregon 97123. Proposals received after the designated time and date will be returned unopened.

Minority/Women/Emerging Small Business ("MWESB") firms are encouraged to submit proposals in response to this solicitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award of any contract entered into pursuant to this advertisement.

The City may reject any proposal not in compliance with all prescribed solicitation procedures and requirements and other applicable law, may reject any or all proposals in whole or in part when the cancellation or rejection is in the best interest of the City as determined by the City, and may waive any minor informalities in any proposal.

Jay Leroux, Information Services

ORPIN

November 20, 2009

Hillsboro Chamber of Commerce

November 20, 2009

TABLE OF CONTENTS

Page No.

COPY OF ADVERTISEMENT

SPECIAL INSTRUCTIONS

1.0	Introduction	5
2.0	Issuing Office	6
3.0	Schedule of RFP Events	6
4.0	Submission Date	6
5.0	Place of Submission of Proposals	7
6.0	Evaluation of Proposals	7
7.0	Proposal Format.....	9
8.0	Term of Agreement.....	14
9.0	Contract Between Firm and City	14

PROJECT INFORMATION 15

1.0	Purpose	15
2.0	Scope of Work	15
3.0	Specific Services Required.....	17
4.0	Proposer Requirements	18

GENERAL INSTRUCTIONS TO PROPOSERS..... 20

SAMPLE OF PROFESSIONAL SERVICES AGREEMENT 26

CERTIFICATION AND CONTRACT OFFER..... 37

PROPOSED SOLUTION COSTS form..... 38

ATTACHMENTS:

APPENDIX A - TECHNICAL REQUIREMENTS..... 43

APPENDIX B – FUNCTIONAL REQUIREMENTS 45

APPENDIX C – VENDOR QUESTIONNAIRE..... 64

APPENDIX D – GEOGRAPHIC INFORMATION SYSTEM..... 67

APPENDIX E – SYSTEM INTEGRATION REQUIREMENTS..... 76

SPECIAL INSTRUCTIONS

Proposal Title: Asset Management, Work Order, and Maintenance Management System Software solution

Proposal Due Date: 2:00PM (PST), JANUARY 8, 2010

1. INTRODUCTION

The City of Hillsboro ("City") is requesting proposals for an Asset Management, Work Order, and Maintenance Management System software solution. The City desires to select an enterprise software solution that can be implemented through a phased implementation and budgeted approach. This solution will be implemented by City staff with possible vendor assistance depending on available and future funding. The software solution must be capable of integrating with the City's existing systems and technologies and be able to support and operate the City's Public Works, Water, Water Treatment Plant (WTP), Parks and Recreation, and Fleet and Facilities department's daily work operations. Although the City intends to select an enterprise solution, the City plans to only implement an initial phase of this project at this time. The initial phase includes implementing a GIS integrated utility infrastructure inventory, work order, and maintenance management solution specifically for the Public Works Department's Sanitary and Storm Utility Sewer team and the Water Department's Distribution team. In addition, the initial phase will also include implementing an equipment inventory, work order, and maintenance management solution for the Water Department's Water Treatment Plant team, the Parks and Recreation Department's Equipment Repair and Maintenance team, and the Public Works' Sign Inventory team.

It is the City's requirement that the system operate and integrate with the City's Tyler Technologies MUNIS financial system, ESRI based GIS system, and other related systems that currently support City operations as identified in this RFP. Additionally, it is the City's requirement that the software conform to the City's technical requirements which includes integrating and operating natively in a Microsoft based computing environment.

It is the City's further requirement that the proposed software solution have the capability to scale up to 100 users across multiple departments, support independent data operations between departments, operate in a mobile in-field environment, and at multiple City locations.

Responding bidders are requested to bid implementation service fees for ongoing implementation assistance and services as needed.

The City desires to enter into a contract with a qualified firm that can demonstrate competency and experience in hardware integration, software development and maintenance, training, system and technical support, and implementation services for an Asset Management, Work Order, and Maintenance Management system software solution.

The City of Hillsboro ("City") is an Oregon municipal corporation with City limits covering approximately 23 square miles. The population of the City is approximately 88,300. The City employs approximately 740 full-time and 560 part-time staff, and is governed by a City Council comprised of six Councilors and the Mayor. The Council acts as the contract review board for the City.

The City has an annual budget of over \$300 million from a variety of sources. The funding is derived primarily from property tax support, user fees, grants, and contracts.

Please refer to the City's website at www.ci.hillsboro.or.us for more information.

2. ISSUING OFFICE

The Information Services Department of the City will issue the Request for Proposals documents and that office shall be the sole point of contact. Please contact the following person:

Jay Leroux
Information Systems Manager, Information Services
150 East Main Street, 3rd Floor
Hillsboro, OR 97123
Phone: 503-681-5420; facsimile: 503-681-5430
E-mail: jayl@ci.hillsboro.or.us

No City employee or officer is authorized to make any oral interpretation of any provisions within the RFP or contract document. The City will not be responsible for any oral remarks related to this RFP. Proposers who are in doubt about any aspect of this RFP must submit written questions to the issuing office as soon as possible after receiving the RFP. The issuing office can be contacted by emailing jayl@ci.hillsboro.or.us and using **Asset Management RFP Questions** in the subject line. All written questions and subsequent answers will be posted on ORPIN and made available to all prospective bidders.

3. SCHEDULE OF RFP EVENTS

Event:	Date:
Release RFP Documents	November 20, 2009
Informational Pre-Proposal Meeting	December 1, 2009 – 2pm-3pm (PST)
Answers from Pre-Proposal Meeting Posted to ORPIN	December 4, 2009
Deadline for Proposal Submission	January 8, 2010
Vendor Demonstrations (tentative)	January 27 – 29, 2010 (tentative)
Pilot (tentative)	February 8– 12, 2010 (tentative)
Contract Approval (tentative)	February 23, 2010 (tentative)
Commencement of Contract (tentative)	March 2, 2010 (tentative)

4. SUBMISSION DATE

Proposals are due no later than **2:00PM (PST), JANUARY 8, 2010** (Pacific Standard Time)

5. PLACE OF SUBMISSION OF PROPOSALS

In order to be considered for this project, each Proposer must provide nine (9) bound copies of their proposal, including the original copy marked "ORIGINAL". Proposer must also include one (1) electronic copy of the proposal in Portable Document Format (PDF) or Word 2003 or later. All proposals must arrive at the issuing office on or before the listed due time and date. A corporate officer who has been authorized to make such a commitment must sign proposals. Proposals shall be sealed in an opaque envelope or box, with the words "Asset Management, Work Order, and Maintenance Management System RFP" clearly written on it.

The document shall be addressed and delivered as follows to:

Asset Management, Work Order, and Maintenance Management System RFP
Attention Jay Leroux
Information Services Department
150 E Main St, 3rd Floor
Hillsboro, OR 97123

6. EVALUATION OF PROPOSALS

The City will be evaluating proposals deemed responsive to this request using a multiple-tiered competition pursuant to OAR 137-047-0262. The award will be based upon the proposal that is determined to best meet the needs of the City. All proposals submitted shall be valid for a period of one hundred twenty (120) calendar days from the date of proposal opening. The following outlines the process for selection.

6.1 Establish Competitive Range

After Proposal opening, an initial screening will disqualify any proposal which is not a complete submittal, and then the RFP evaluation team will evaluate the remaining proposals received and establish a Competitive Range pursuant to OAR 137-047-0262. Following the evaluation team's analysis of the written proposals and discussions, the responses will be ranked to establish highest scored responses. The Competitive Range may include up to the three (3) highest scored responses. However, the City may increase the size of the Competitive Range pursuant to OAR 137-047-0262(1)(a)(B). The City reserves the right to obtain clarification on any point in the Proposer's proposal.

Responsive proposals will be ranked on the following criteria:

	<u>Points</u>
Proposer Qualifications	20
Technical Solution Fit	20
Functional Fit	40
Initial Implementation and Training Plan	20
Total	100

The City may consider awarding up to 20 additional points for the following:

- Administrative and Contractual fit
- Value
- Client References

6.2 Evaluation of Vendor Presentation And Demonstration

Firms or individuals selected from the 1st round evaluation will be required to provide an approximately day long oral presentation and demonstration of the proposed solution to the City following a City provided written script and schedule. Such presentation shall provide an opportunity for Proposer's to clarify their proposal to ensure thorough mutual understanding.

The evaluation committee may ask additional questions related to the proposal, the Scope of Work, and/or proposed solution to enhance the evaluation committee's understanding of the proposed solution. Scoring of proposed solutions, based on the Proposer's presentation and demonstration, will be made as part of the selection process.

Vendor presentations and demonstrations will be ranked on the following criteria:

	<u>Points</u>
Product Maturity and Strategic Direction	20
Verification of Technical Solution Fit	20
Verification of Functional Fit	40
Product Training and Technical Support Options	20
Total	100

The City may consider awarding up to 20 additional points for the following:

- Administrative and Contractual fit
- Value
- Client References

The City will schedule and provide the time, agenda, and location of each vendor presentation and demonstration. The City will also provide a written script that each finalist is required to follow. Proposers not following the provided script will be asked by the evaluation committee to adhere to the requirements, and if failing to do so, will have their presentation and demonstration session ended and be removed from consideration.

The evaluation committee will require that the vendor presentation and demonstration be conducted in person at the City of Hillsboro. Firms or individuals invited to the interview will be responsible for making and paying for their own travel arrangements.

After the proposer's presentation and demonstration, where opportunity for an improved mutual understanding of the proposal and the City's needs has occurred, the City may ask for a best and final offer regarding the proposer's costs and services to be considered as part of the Evaluation of the Vendor Presentation and Demonstration.

6.3 Vendor Pilot

At the conclusion of the Evaluation of the Vendor Presentations and Demonstrations, the City may select one (1) firm or individual to participate in a pilot evaluation based on which proposer is highest ranked in the vendor presentation and demonstration evaluation process. The selected firm or individual will be required to install their proposed solution on the City of Hillsboro's test environment. Once successfully installed and to the City's satisfaction, the City will evaluate the proposed solution for a one (1) week period. If the City determines the proposed solution is not in the best interests of the City, the City reserves the right to invite the next highest rated firm or individual to participate in the pilot evaluation.

7. PROPOSAL FORMAT

7.1 Cover Letter

Page limit – 2 pages

Provide a cover letter and company profile introducing your firm. Include how long your company has been operating as well as your experience implementing your proposed solution.

7.2 Proposed Products and Services

Page limit – 5 pages

Products and Services: Summarize the products and services you are proposing. Describe the maturity of your proposed solution including the long term strategic direction of the proposed solution. Include answers to the following:

- 1.) What the proposed solution version is?
- 2.) When was the proposed solution released including the parent release?
- 3.) How many and which clients are currently and actively using the proposed solution and version?
- 4.) How many and which clients are considering implementing the proposed solution?
- 5.) How long has the proposed solution been actively utilized by those clients using it?

Client Base: Summarize your experience and client base in the NW region of the United States. Particularly what cities and/or other public entities you currently represent or provide services for. Submit a list with contact names and phone numbers of the following:

1. Three (3) client references,
2. Three (3) clients who are currently using the proposed solution and version, and
3. Your five (5) most recently acquired clients.

7.3 Responses to Technical Requirements

*“Asset Management, Work Order, and Maintenance Management System Software
Appendix A - Technical Requirements”*

Responses to the requirements listed in “Asset Management, Work Order, and Maintenance Management System Software, Appendix A – Technical Requirements” of this RFP must be provided in this section of the proposal. Proposers must use the format provided and add explanatory details as necessary in the comments section.

Note: Any requirement that is not answered will be treated as a negative/non-response.

7.4 Responses to Functional Requirements

*“Asset Management, Work Order, and Maintenance Management System Software
Appendix B – Functional Requirements”*

Responses to the requirements listed in “Asset Management, Work Order, and Maintenance Management System Software, Appendix B – Functional Requirements” of this RFP must be provided in this section of the proposal. Proposers must use the format provided and add explanatory details as necessary in the comments section.

Note: Any requirement that is not answered will be treated as a negative/non-response.

7.5 Responses to Vendor Questionnaire

*“Asset Management, Work Order, and Maintenance Management System Software
Appendix C – Vendor Questionnaire”*

Responses to the questions listed in “Asset Management, Work Order, and Maintenance Management System Software, Appendix C – Vendor Questionnaire” of this RFP must be provided in this section of the proposal. Proposers must use the format provided and add explanatory details as necessary in the comments section.

Note: Any question that is not answered will be treated as a negative/non-response.

7.6 Proposed Approach and Initial Setup and Configuration Plan

Page limit – 10 pages

The proposer must provide a detailed plan for installation, setup, and initial configuration of the proposed system. Refer to the next section **Project Information, 2.0 Scope of Work** for details on the requested implementation scope of work.

The plan must include:

- Project approach
- Detailed implementation methodology
- Major activities and deliverables
- Installation and integration approach

- Schedule and milestones (**Microsoft Project format preferred**)
- Expected number of City FTE hours required at different stages of the implementation process and for ongoing support
- Expected hours of proposer staff for each major activity. Also, expected hours of proposer staff on site during each major activity

7.7 Proposed Integrations

Page limit – 4 pages

The City currently utilizes Tyler Technologies' MUNIS as its financial/ERP system, Invensys' Wonderware as its Water Treatment Plant SCADA system, and Peninsular Technologies' Pipe Tech CCTV solution for sanitary and storm sewer video inspection. The proposed solution must have the ability to integrate with these systems. In addition, the City needs to be able to track costs associated with work performed and have that information integrate with the City's Time and Attendance tracking efforts. Please describe your proposed software solution's ability and proposed solution for integrating with the following systems as specified in Appendix E.

- Tyler Technologies' MUNIS (ERP)
- Invensys' Wonderware (SCADA)
- Peninsular Technologies' Pipe Tech video inspection system (CCTV)
- City Time and Attendance processes

Refer to Appendix E for Munis, Wonderware, Pipe Tech, and Time and Attendance integration specifications.

7.8 Proposed Training Plan and Options

Page limit – 5 pages

The proposer must provide an overview of proposed training. User training must be in person and conducted at a City of Hillsboro facility. This section must include:

- A training implementation plan including estimated time-frame and deliverables for each stage of the project
- Trainer resumes
- A hardcopy or digital sample of training materials, syllabus, or table of contents (this part is not bound by the page limit for this section)
- Description of your proposed training strategy distinguishing between the following training types:
 - 1.) **Technical Support Training Strategy**
(i.e. SW installation, HW configuration, network configuration, upgrade process, patch update process, etc.)
 - 2.) **System Administration Training Strategy**
(i.e. product configuration, customization procedures, database and table setup, etc.)
 - 3.) **End User Training Strategy**

(i.e. how to use the installed, configured, software).

- Describe any certifications your proposed solution may have

7.9 Support and Maintenance Program Options

Page limit – 3 pages

Specify the nature of any post-implementation support options provided for the proposed solution including:

- Telephone support; include toll-free support hotline; hours of operation (PST); availability of 24 x 7 hotline, location, etc.
- Escalation procedures and availability of advanced technical support (e.g., “Level 2,” engineers, developers, etc.)
- Special plans defining “levels” of customer support (e.g., gold, silver, etc.)
- Delivery method of future upgrades and product enhancements including historical frequency of upgrades
- Existence of, and contact information for, any user groups for the proposed solution
- Existence and availability of certification processes
- Problem reporting and resolution procedures
- Other support (e.g., on-site, remote dial-in, Website access to patches, fixes and knowledge base)
- Prime contact

7.10 Partnership and Relationship Team

Please list the names, credentials, areas of expertise and experience, and location of the key persons that would be assigned to a relationship team with the City of Hillsboro

Page limit – 5 pages

7.11 Cost

Please detail the fee structure that you propose to utilize for this contract. Describe the fee structure using the **PROPOSED SOLUTION COSTS** form included in this RFP. The fee structure is as follows:

- Proposed software licensing options:
 - o Proposed software licensing cost for 16 multi-department users for the following functional teams. Distinguish between product modules and licenses as appropriate for your proposed solution.
 - Public Works' Sanitary and Storm Utility Sewer team (4 users)
 - Water Distribution team (4 users)
 - Water Treatment Plant team (4 users)
 - Parks and Rec. Equipment Repair and Maintenance team – (2 users)

- Information Services Test/Development and Production Administration support (2 licenses)
- o Proposed software licensing cost for up to 100 users for the following functionality in the Public Works, Water, Water Treatment Plant, Parks and Recreation, and Fleet and Facilities departments.
 - Work Order Management
 - Maintenance Management
 - Equipment Inventory Management
 - GIS Inventory Integration/ Management
 - GIS Interface
 - Fleet Maintenance
 - Facility Maintenance
 - Mobile solution
 - Development and Support licensing

Provide single-use and concurrent-use costs per module. Distinguish between product modules and licenses as appropriate for your proposed solution.

- o Proposed software licensing cost for a citywide site license for the following functionality.
 - Work Order Management
 - Maintenance Management
 - Equipment Inventory Management
 - GIS Inventory Integration/ Management
 - GIS Interface
 - Fleet Maintenance
 - Facility Maintenance
 - Mobile solution
 - Development and Support licensing

Distinguish between product modules and licenses as appropriate for your proposed solution.

- Proposed Initial Setup and Configuration cost (see section 7.6)
- Proposed Integration cost for MUNIS (see section 7.7)
- Proposed Integration cost for Wonderware (see section 7.7)
- Proposed Integration cost for Pipe Tech (see section 7.7)
- Proposed Integration cost for Time and Attendance (see section 7.7)
- Proposed Training Plan and Options cost (see section 7.8)
- Proposed Support and Maintenance Program costs (see section 7.9)
- An hourly rate schedule for additional work that may be added to the Scope of Work requested by the City beyond the initial Scope of Work
- Pricing for any other additional services you may provide or recommend

7.12 Certification and Contract Offer

Please complete the attached **Offer** form, with the required signature and other information listed.

8.0 TERM OF AGREEMENT

The contract resulting from this RFP shall be for a period of three (3) years, commencing March, 2010 with an option to renew/extend the contract up to an additional two (2) years. If the City elects to renew/extend the contract it shall provide written notice to the Contractor a minimum of thirty (30) days prior to the expiration of the current contract of its intent to do so. The contract may be terminated by mutual consent of both parties, or by either party, without cause, upon thirty (30) days notice, in writing and delivered by certified mail or in person.

9.0 CONTRACT BETWEEN CONTRACTOR AND CITY

9.1 This RFP and all subsequent modifications thereto are hereby designated as the sole reference and authority for the preparation of proposals and takes precedence over any source, either by verbal or written communications.

9.2 This RFP and the contents of the proposal of the successful Proposer will become contractual obligations if an agreement ensues. Failure of the successful Proposer to accept these obligations in an agreement may result in cancellation of the award.

9.3 The contract shall be substantially in the form of the attached "Professional Services Agreement."

PROJECT INFORMATION

Proposal Title: Asset Management, Work Order, and Maintenance Management System Software

Proposal Due Date: 2:00pm (PST), January 8, 2010

1.0 PURPOSE

The City of Hillsboro ("City") desires to enter into a professional services agreement with one (1) qualified individual/firm who/that can provide system software to support the City's Asset Management, Work Order, and Maintenance Management initiative, that can demonstrate competency and experience in providing, installing, integrating, and supporting that software, as well as provide high quality and responsible service at a competitive price to the City. Additionally, the chosen individual or firm will be amiable to consulting and working with the City's Information Services Department.

The City desires to select an enterprise software solution that can be implemented through a phased implementation and budgeted approach. This solution will be implemented by City staff with possible vendor assistance depending on available and future funding. The software solution must be capable of integrating with the City's existing systems and technologies and be able to support and operate the City's Public Works, Water, Water Treatment Plant (WTP), Parks and Recreation, and Fleet and Facilities department's daily work operations. Although the City intends to select an enterprise software solution as part of this process, the City plans to only implement an initial phase of this project at this time. The initial phase includes implementing a GIS integrated utility infrastructure inventory, work order, and maintenance management solution specifically for the Public Works Department's Sanitary and Storm Utility Sewer team and the Water Department's Distribution team. In addition, the initial phase will also include implementing an equipment inventory, work order, and maintenance management solution for the Water Department's Water Treatment Plant team, the Parks and Recreation Department's Equipment Repair and Maintenance team, and the Public Works' Sign Inventory team.

It is the City's requirement that the system operate and integrate with the City's Tyler Technologies MUNIS financial system, ESRI based GIS system, and other related systems that currently support City operations as identified in this RFP. Additionally, it is the City's requirement that the software conform to the City's technical requirements which includes integrating and operating natively in a Microsoft based computing environment.

It is the City's further requirement that the proposed software solution have the capability to scale up to 100 users across multiple departments, support independent data operations between departments, operate in a mobile in-field environment, and at multiple City locations.

2.0 SCOPE OF WORK

2.1 Asset Management, Work Order, and Maintenance Management System Services – General Information

This is the entire scope of work which the City is requesting proposers to respond to. The City reserves the right to select and implement only portions of the scope of work, or add to the scope of work, as it deems appropriate.

The general scope of work for initial implementation consists of the Contractor (also sometimes referred to as the "Firm", the "Proposer" or the "Vendor") performing the following services:

SOFTWARE

- Provide software licensing that meets the requirements and needs of the City's Asset Management, Work Order, and Maintenance Management initiative

INSTALLATION AND CONFIGURATION

- Install and Initially Configure the proposed software solution for:
 - o Work Order Management
 - o Service management (quick entry and external department request processes – not a public request process)
 - o Maintenance Management (Preventative Maintenance Scheduling and Calendaring)
 - o Equipment Inventory Management (particularly for the Water Treatment Plant team, the Parks and Recreation equipment repair and maintenance team, and the Public Works' Sign Inventory team)
 - o GIS interface and two-way interaction with proposed solution
 - o GIS utility inventory integration tool(s)
 - o Reporting tool or solution
 - o Independent data access between City teams
- Install proposed software solution in the City's development environment
- Install proposed software solution in the City's production environment

GIS INTEGRATION

- Integrate the City's existing Microsoft SQL and ESRI SDE based GIS utility inventory data for Water, Sanitary sewer, and Storm sewer utility infrastructure with the proposed solution enabling two-way data synchronization between the City's GIS and the proposed solution. Refer to Appendix D for details on the City's existing Water, Sanitary sewer, and Storm sewer GIS feature classes.
- Implement the proposed solution's GIS interface using the City's existing GIS software and GIS system where required. The City has an ESRI site license for all ESRI GIS products (ArcGIS desktop, ArcGIS server, ArcSDE, and ArcIMS) and will use the City's GIS staff to implement the ESRI portion of the solution.

MUNIS INTEGRATION

- Integrate the proposed software system with the City's financial system, Tyler Technologies' MUNIS, as specified in Appendix E

TRAINING

- Provide user training, training materials, and ongoing instructional services that enables the City to implement, operate, and support the proposed software solution for the following groups:
 - o City technical support staff (4 to 6 people)
 - o City software system administrators (4 to 6 people)
 - o City end users.(16 to 20 people)

2.2 Communications

The City requires that the Firm have the communication abilities and skills to provide the City with the most effective and professional advice and to:

- Be available in a timely manner, in person, by telephone, fax or email, for consultation or advice;
- Follow established procedures regarding which City representative(s) may request advice;
- Be familiar with state and federal laws relating to the City;

- Provide periodic status reports on the services provided by the firm;
- Provide itemized monthly invoices of charges; and
- Advise and participate in meetings as requested by the City.

2.3 Responsibilities

2.3.1 Responsibility of Contractor – It is understood and agreed that the services the Proposer will be contracted to perform under this shall be rendered directly by it or under close personal supervision by it, and that the work shall be faithfully performed with care and diligence. The Contractor will return all calls or other contracts from City within a reasonable time. If it is not possible for the called or contacted party to respond, the Contractor will make arrangements for a designated member of the Contractor to respond to the contact.

2.3.2 Responsibility of the City – Jay Leroux, IS Manager, will provide the Contractor with a list of designated City employees who are authorized to contact the Contractor. The City of Hillsboro will also provide a point of contact for all service and billing issues.

2.3.3 Joint Responsibility – If additional services, supplemental to those included are required, both the City and the Contractor have the responsibility to identify those services, include them as an addendum or amendment to the Contract, and determine fair compensation for the additional services.

3.0 SPECIFIC SERVICES REQUIRED

3.1 Experience and Expertise. A Firm making a proposal must show that it has experience and expertise in:

3.1.1 Installation, implementation, and integration of Asset Management, Work Order, and Maintenance Management system solutions with GIS and Financial systems;

3.2 Administrative Services

3.2.1 Firm will provide a principal or partner-level individual to be the point of contact for all service and billing issues.

3.2.2 Firm will recommend specialists for other services related to the project if the City so requests. The City reserves the right of approval of any specialist(s) and to select other service providers.

3.2.3 Concerning the manner in which services are provided, the City expects that the work will be assigned to individuals in the most efficient manner consistent with their experience and training.

3.2.4 If it is necessary to associate with other contractors in any matter, prior approval must be obtained from the City designated contact with the Firm. The Firm must inform associated service providers of the procedure set forth herein.

3.3 Invoicing and Statement of Work

3.3.1 A schedule of incremental and hourly rates of all functions of the Firm who will work on City matters must be submitted as part of the proposal. The rates provided should reflect the rates to be charged for each year covered by the proposal.

3.3.2 Invoices for services will be submitted monthly for any month in which there has been activity of any substance. An annual summary of billing will also be provided when requested by the City. Time spent by the Firm is to be shown in specific time billing periods, such as by the minute, by the quarter hour or whatever increment of time is mutually acceptable to the Firm and to the City.

3.3.3 Each monthly invoice will set forth separately each matter currently being handled and will clearly identify the City employee(s) working with the Firm. Included monthly must also be a total charged to date for each matter.

3.3.4 For each matter denoted on an invoice, the detail will include the hours spent by each of Contractor's personnel on the file.

3.3.5 Each expense and/or disbursement must be specifically identified on the invoice.

3.4 Changes of Scope and Additional Work

The Contractor may be requested to perform special projects for the City. Because of variations in the demand for additional services from time to time, such work shall be agreed upon in advance, contracted for, provided and billed separately to the City on a pre-arranged basis.

4.0 PROPOSER REQUIREMENTS

4.1 Minimum criteria: Each Proposer shall demonstrate and meet the following minimum criteria:

4.1.1 Each Proposer shall have not less than three (3) years experience in providing all the types of services required within the Scope of Work.

4.1.2 Shall demonstrate, to the satisfaction of the Evaluation Committee, the ability to provide the services required within the Scope of Work to the City and shall demonstrate a proven history of providing such service for public agencies.

4.1.3 Shall not have a record of substandard workmanship. The City will verify this requirement by communication with a variety of each Proposer's clients and references, and as many other references as may be deemed appropriate.

4.2 Cost of RFP and Associated Responses

This RFP does not commit the City to paying any expenses incurred by any Firm in the submission or presentation of a proposal, or in making the necessary studies for the preparation of a proposal, or in traveling to the site of the interviews. All such costs and expenses shall be borne by each Proposer.

4.3 Right to Clarification and Additional Research

The City reserves the right to obtain clarification of any point in a Firm's proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure of a Proposer to respond to such a request for additional information or clarification could result in rejection of the Firm's proposal. The City may obtain information from any legal source for the clarification of any proposal or for information on any Firm including, but not limited to, police files, insurance files, agency files, credit bureaus, and/or professional organizations. The City shall not be

required to inform the Firm of any intent to perform additional research in this respect or of any information thereby received.

4.4 Items that are subject to negotiation.

For professional services the Scope of Work, pricing structure whether a lump sum or rate schedule and all other aspects of this Request for Proposal may be subject to negotiation.

Any terms and conditions of the Professional Services Agreement that the proposer wishes to negotiate or modify shall be presented in the response to this RFP.

GENERAL INSTRUCTIONS TO PROPOSERS

The following instructions, terms and conditions apply to all proposals to provide either goods or services to the City of Hillsboro.

1. PROPOSALS NOT AVAILABLE FOR PUBLIC INSPECTION AT THE OPENING.

In accordance with ORS 279B.060(5)(a) only the names of the proposers shall be disclosed at the opening. Notwithstanding ORS 192.410 to 192.505, proposals are not required to be open for public inspection until after the notice of intent to award a contract is issued.

2. CITY RESERVATION OF RIGHTS.

The City expressly reserves the following rights:

- 2.1 To reject any and/or all irregularities in the proposals submitted.
- 2.2 To reject any and/or all proposals or portions thereof.
- 2.3 To waive any minor informality in any proposal.
- 2.4 To base awards due with regard on quality of services, experiences, compliance with specifications, and other such factors as may be necessary in the circumstances.
- 2.5 To make the award to any Proposer whose proposal, in the opinion of management and the Council, is in the best interest of the City.
- 2.6 To make award based on negotiations conducted in accordance with this solicitation or on the basis of a best and final offer by the proposer.
- 2.7 Only the evaluation factors specified in this solicitation may be used as a basis for award.

3. USE OF PROPOSAL FORMS.

Proposers are required to use the furnished Proposal Forms. Please retain a copy for your records.

4. LATE PROPOSALS.

Any proposal received after the hour and date specified will not be considered and will be returned unopened. It is the sole responsibility of the offering Proposer or Contractor to ensure receipt of proposals by the City in the specific location designated by the specified time.

5. PROPOSER REPRESENTATIONS.

The Proposer further agrees to the following:

- 5.1 To examine all specifications and conditions thoroughly.
- 5.2 To provide for appropriate insurance, deposits, and performance bonds if required.
- 5.3 To comply fully with specifications as attached for the agreed contract, especially where materials and work are involved.
- 5.4 That any and all registration requirements where required for contractors as set forth in the Oregon Revised Statutes are met.

6. ADDENDA.

Any amendment(s) to or error(s) in the general Specifications or Project/Proposal section called to the attention of the City will be added to or corrected and furnished by written addendum to all those holding specifications. All addenda shall be mailed at least five (5) business days before the time set for proposal submission. All addenda issued during the proposal period will be incorporated into any resultant contract.

7. FORMAT OF PROPOSALS.

Telephone proposals are not acceptable. Telegraphic, emailed or facsimiled proposals will not be considered unless authorized by the Special Instructions.

8. OWNERSHIP OF PROPOSAL DOCUMENTS.

All documents, reports, proposals, submittals, working papers or other material submitted to the City from the Proposer shall become the sole and exclusive property of the City, in the public domain, and not the property of the Proposer. The Proposer shall not copyright, or cause to be copyrighted, any portion of any of said documents submitted to the City as a result of this solicitation.

9. INVALID PROPOSAL DOCUMENTS.

Copies of proposal documents obtained from sources other than at **<http://orpin.oregon.gov/open.dll/welcome>** (such as other Contractors) are not valid proposal documents. It is the Proposer's responsibility to insure that their name is on the City's proposer list for that particular service in order to receive notification of all addenda as well as additional relevant information.

10. PROTEST OF PROPOSAL SPECIFICATIONS OR CONTRACT TERMS

10.1 Time for Submission of Protest. Specifications and contract terms shall be made available for inspection and copying at the address provided below. Unless a different deadline is specified in the Request for Proposals, protests of the proposal specifications or contract terms shall be presented to the City in writing at least five (5) calendar days prior to proposal closing.

(a) Such protest or request for change shall include the reasons for protest or request, and any proposed changes to specifications or terms. No protest against award because of the content of proposal specifications or contract terms shall be considered after the deadline established for submitting such protest.

(b) Envelopes containing protests of specifications shall be marked and mailed as follows:

Proposal Specification Protest

Proposal Name: Asset Management, Work Order, and Maintenance Management System
RFP Protest

Attn: Jay Leroux - IS Manager
Information Services
150 East Main St, 3rd Floor
Hillsboro, OR 97123

11. PROTEST OF INTENT TO AWARD

11.1 Notice of Intent to Award (OAR 137-047-0610)

The written notice of intent to award a contract shall constitute a final decision of the City to award the contract if no written protest of the notice of award is filed with the City within seven (7) calendar days of the notice of intent to award. If a protest is timely filed, the notice of award is a final decision of the City only upon issuance of a written decision denying the protest and affirming the award. The notice of intent to award and any written decision denying a protest shall be sent to every Proposer.

11.2 Right to Protest

Any actual Proposer who is adversely affected or aggrieved by the notice of intent to award of the contract to another Proposer on the same solicitation shall have seven (7) calendar days after the notice of intent to award to submit to the City a written protest of the notice of intent to award. The written protest shall specify the grounds upon which the protest is based. The City shall not entertain a protest submitted after the time period established in this rule or such different period as may be provided in the City's RFP.

12. WRITTEN PROTEST OF INTENT TO AWARD

Proposers must submit written protests of the intent to award to **Jay Leroux, Information Systems Manager, Information Services Department** within seven (7) after days after the notice of intent to award. The written protest must specify the grounds upon which the protest is based.

13. WITHDRAWAL OF PROPOSALS

Proposals may be withdrawn on written or telegraphic request received from Proposers prior to the time fixed for proposal closing. Negligence on the part of the Proposer in preparing the proposal confers no right for withdrawal of the proposal after the proposal has been opened.

14. REJECTION OF PROPOSALS

The City reserves the right to reject any or all proposals received in response to this RFP if it is determined to be in the best interest of the City. The City shall notify all proposers of the rejection of all proposals, along with the reasons for rejection of all proposers. (Criteria for rejection of all proposals are located at OAR 137-047-0650.)

15. ERASURES AND CORRECTION

The RFP response must not contain any erasures or corrections unless the Proposer initials each change.

16. DURATION OF PROPOSAL

Proposal prices, terms and conditions shall be firm for a period of at least ninety (90) days from the deadline for receipt of submittal. The successful proposal shall not be subject to future price escalation or changes of terms if accepted during the ninety (90) day period. Price decreases or changes in terms by others after the acceptance of a proposal will not be considered.

17. PUBLIC RECORDS

This Request for Proposals and one (1) copy of each original proposal received in response thereto, together with copies of all documents pertaining to the award of a purchase or contract, shall be kept by the City for a period of at least three (3) years and made a part of a file or records which shall be open to public inspections after a notice of award has been issued. If a proposal contains any proprietary information that the Proposer does not want disclosed to the public or

used by the City for any purpose other than evaluation of their offer, each sheet of such information must be marked with the following legend:

"This data shall not be disclosed outside the City or be duplicated, used or disclosed in whole or in part for any purpose other than to evaluate the proposal; provided, that if a contract is awarded to the Contractor as a result of, or in connection with, the submission of such information, the City shall have the right to duplicate, use or disclose this information to the extent provided in the contract. This restriction does not limit the City's right to use information contained herein if it is obtained from another source."

The above restriction may not include cost or price information that is required to be open to public inspection.

18. SUBCONTRACTING

18.1

All subcontracting shall be subject to the approval of the City. No list of subcontractors approved by the City may be changed or departed from except as consented to by the City in writing. Whenever the City consents to the substitution of one subcontractor for another, if any reduction in cost to the contractor result therefrom the amount thereof shall be passed on to the City as a reduction in the amount to be paid to the contractor for the performance of the work.

18.2

The contractor shall be wholly responsible for the performance of all subcontractors and for their acts and omissions, and those of persons either directly or indirectly employed by the contractor, and the fact that subcontractors are subject to the approval of the City shall not affect the contractor's responsibility in this regard.

18.3

The contractor shall bind every subcontractor to all terms and conditions anywhere contained in the contract documents as far as applicable to the work of such subcontractor so that the subcontractor assumes toward the contractor and toward the work all the obligations and responsibilities that the contract assumes toward the City as to the performance of the subcontractor's portion of the work.

18.4

Nothing contained in the contract documents shall be construed to create any contract between the City and any subcontractor. Subcontracts must be let pursuant to applicable Oregon Statutes and Administrative Rules.

19. PRIME CONTRACTOR RESPONSIBILITIES

The selected Proposer will be required to assume responsibility for coordination, engineering, delivery, installation, and maintenance of all equipment, software and services offered in their proposal, whether they are the manufacturer or producer of them. Further, the City will consider the selected Proposer to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the lease or purchase of the entire service equipment and software configuration. Only service and equipment offered by Proposers who have installed similar systems of comparable size will be considered. All service and equipment offered will be in current standard production and of the latest design.

20. INTERGOVERNMENTAL COOPERATIVE AGREEMENT

Pursuant to ORS 279A, other public agencies shall have the ability to purchase the awarded goods and services from the awarded Contractor(s) under terms and conditions of the resultant contract.

Any such purchases shall be between the Contractor and the participating public agency and shall not impact the Contractor's obligation to the City of Hillsboro. Any estimated purchase volumes listed herein do not include other public agencies and the City of Hillsboro makes no guarantee as to their participation.

Any bidder, by written notification included with their solicitation response, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies.

Will your company participate in Intergovernmental
Cooperative Purchasing?

☐ Yes ☐ No

If No, please explain on a separate sheet of paper.

21. AFFIRMATIVE ACTION/NONDISCRIMINATION

By submitting a proposal, the Contractor agrees to comply with the Fair Labor Standard Act, Civil Rights Act of 1964, Executive Order 11246, Fair Employment Practices, Equal Employment Opportunity Act, Americans with Disabilities Act, and Oregon Revised Statutes. By submitting a proposal the Proposer specifically certifies, under penalty of perjury, that the Proposer has not discriminated against minority, women or emerging small business enterprises in obtaining any required subcontracts.

22. ACCOUNT REPRESENTATIVE

The selected Contractor shall assign a competent account representative acceptable to the City who will represent the Contractor in providing contracted services to the City. If the account representative is removed by the Contractor, the new representative must be acceptable to the City.

23. PREVAILING OPINION

If any doubt or difference of opinion arises between the City and the Contractor as to the interpretation of this RFP, the decision of the City will be final and binding upon all parties.

24. PUBLICITY

News releases by the Contractor pertaining to the award of any contract or use of any product will be made with prior written approval from the City.

25. FINANCIAL INTEREST

By submitting a proposal the Proposer certifies, under penalty of perjury, that no City employee or officer has a direct or indirect financial interest in the proposal. Moreover, the Proposer certifies that the RFP response did not involve illegal collusion with another Proposer.

26. RECYCLABLE MATERIALS

Contractor shall use recyclable products to the maximum extent economically feasible in the performance of the contract.

27. PERFORMANCE AND PAYMENT BONDS

No performance and payment bonds are required.

28. RIGHT TO CLARIFY

The City reserves the right to obtain clarification on any point in the Proposer's proposal. The failure of the Proposer to make additional information available could result in the rejection of the response. Such clarification might involve the delivery of demonstration equipment to the City for evaluation purposes. Such hardware will be provided at no cost to the City. The City is not obliged to evaluate any or all products.

29. CONTRACT AWARD

The award of a contract is accomplished by executing a written agreement that incorporates the entire RFP, Proposer's response, clarifications, addenda, and additions. All such materials constitute the contract documents. The Proposer agrees to accept the contract terms of the attached Professional Services Agreement unless substantive changes are made without the approval of the Proposer. The issuing office is the sole point of contact for the issuance of the contract.

30. PATENT/COPYRIGHT INFRINGEMENT

The Proposer will defend the City from any suits related to patent/copyright infringement. Such a requirement is based upon the condition that the City provides the Proposer with prompt notice of such suit.

31. RISK OF LOSS AND DAMAGE

The City will not be responsible for the loss or damage of any items during the RFP process.

32. FAILURE TO PERFORM

In the event that the Proposer fails to perform any material obligations, the City reserves the right to give the Proposer written notice of such failure. The Proposer will then have thirty (30) calendar days to resolve the failure. If the failure is not resolved within thirty (30) days after the City reserves the right to withhold all money that is due and payable to the Proposer. Such a remedy is in addition to other remedies that might be available to the City. Moreover, the City reserves the right to terminate the contract if the Proposer exceeds thirty (30) days of non-performance.

33. SUFFICIENT INFORMATION

The authorized signer of the Proposer's proposal shall represent and warrant that they have been sufficiently informed in all matters relating to the specified products; that they have checked their proposals for errors and omissions; that the prices stated in their proposals are correct and as intended are a complete and correct statement of prices.

SAMPLE OF

PROFESSIONAL SERVICES AGREEMENT

**CITY OF HILLSBORO
PROFESSIONAL SERVICES CONTRACT**

THIS PROFESSIONAL SERVICES CONTRACT ("Contract") is made and entered into this ____ day of _____, 200__, by and between the City of Hillsboro, a municipal corporation of the State of Oregon ("City") and _____ ("Contractor"). The parties agree as follows:

1. **SCOPE OF WORK.** The Contractor shall provide _____ services to the City (the "Work"), as more particularly described in City's Request for Proposal, dated _____, 2008 ("RFP"), and Contractor's Proposal, dated _____, 2008 ("Proposal"). The RFP and the Proposal are attached to this Contract as Exhibits A and B and are incorporated by reference. In the event of inconsistencies between this Contract and Exhibits A and B, the provisions of this Contract shall control. In the event of inconsistencies between Exhibit A (the RFP) and Exhibit B (the Proposal), the provisions of Exhibit A shall control.

2. **EFFECTIVE DATE AND DURATION OF CONTRACT.** This Contract shall become effective on _____, 2008. Unless earlier terminated, this Contract shall remain in full force and effect until City accepts Contractor's completed performance or on _____, whichever first occurs. Expiration of this Contract shall not extinguish or prejudice City's right to enforce this Contract with respect to any breach of a warranty of Contractor or any default or defect in Contractor performance that has not been cured. This Contract may be extended for an additional two years, upon written notice of City provided to Contractor on or before _____, 2008. Time is of the essence under this Contract.

3. **PAYMENT.** City agrees to pay Contractor the sum of _____ Dollars (\$____) for the Work required under this Contract. The maximum payment, which includes all fees and allowable expenses relating to Contractor's performance under this Contract, shall not exceed \$_____.

3.1 Contractor shall submit monthly billings for work performed. The billings shall describe all work performed with particularity, by whom it was performed and shall itemize and explain all expenses for which reimbursement is claimed. Unless the amount and rate of reimbursement are specified in an attached exhibit to this Contract, the City will not reimburse Contractor for any expenses under this Contract.

3.2 City shall pay Contractor for the amount billed each month within thirty (30) days after receiving Contractor's billing. City shall not pay any amount in excess of the compensation amounts set forth above nor shall City pay Contractor any fees or costs which City reasonably disputes.

4. **CHANGES.** This Contract, including all exhibits attached hereto, shall not be waived, altered, modified, supplemented, extended or amended, in any manner whatsoever, except by written instrument, executed by both parties. Such waiver, alteration, modification, supplement, extension or amendment, if made, shall be effective only in the specific instance and for the specific purpose given. The parties acknowledge and agree that, to the extent permitted by law, this Contract may be amended to specifically provide for additional Contractor services that are within or directly related to the Scope of Work.

5. **KEY PERSONNEL.** Contractor acknowledges and agrees that the City selected Contractor for award of this Contract because of the special qualifications of Contractor's key personnel. In particular, through this Contract, City is engaging the expertise, experience, judgment, and personal attention of _____ ("key personnel"). Contractor shall not reassign or transfer the key personnel to other duties or positions, such that the key personnel [ARE/IS] no longer available to provide City with [HIS/HER/THEIR] expertise, experience, judgment, and personal attention, without first obtaining the City's prior written consent to such reassignment or

transfer. In the event Contractor requests that City approve a reassignment or transfer of the key personnel, City shall have the right to interview, review the qualifications of, and approve or disapprove the proposed replacement(s).

6. INDEPENDENT CONTRACTOR STATUS/CONTRACTOR WARRANTIES. Contractor shall be free from City's direction and control over the means and manner of providing the labor or service, subject only to the specifications of the desired results. Contractor is responsible for obtaining all assumed business registrations or professional occupation licenses required by state or local law. Contractor shall furnish the tools or equipment necessary for the contracted labor or services.

6.1 Contractor agrees, represents and certifies that:

6.1.1 Contractor is engaged as an independent contractor and will be responsible for any federal or state taxes applicable to any payments made under this Contract.

6.1.2 Contractor is not eligible for any federal social security, unemployment insurance, pension, PERS or workers' compensation benefits from compensation or payments paid to Contractor under this Contract

6.1.3 Contractor has filed federal and state income tax returns in the name of the business as part of the personal income tax return, for the previous year, for labor or services performed as an independent contractor in the previous year.

6.1.4 Contractor agrees and certifies that it has complied and will continue to comply with all Oregon laws relating to the performance of Contractor's obligations under this Contract. Contractor shall be qualified, professionally competent and duly licensed to perform the work and services at all times during the term of this Contract.

6.1.5 Contractor is not an employee of Metro, any special district, or local government, including City, the federal government or the State of Oregon.

6.1.6 Contractor has the skill and knowledge possessed by well-informed members of its industry, trade or profession and will apply that skill and knowledge with care and diligence to perform the Work under this Contract in a professional manner and in accordance with standards prevalent in the Contractor's industry, trade or profession.

6.1.7 Contractor has the power and authority to enter into and perform this Contract and when executed and delivered, this Contract shall be a valid and binding obligation of Contractor enforceable in accordance with its terms.

6.1.8 Contractor has read, understands and agrees to be bound by each of the terms and conditions of this Contract.

6.1.9 Contractor prepared its Proposal, Exhibit B to this Contract, independently from all other proposers, and without collusion, fraud or other dishonesty.

6.2 Upon City's request, Contractor shall provide City with evidence reasonably satisfactory to City confirming the foregoing covenants and warranties. The warranties set forth in this paragraph are in addition to, and not in lieu of, any other provided warranties.

7. OTHER CONTRACTORS. City may undertake or award other contracts for additional or

related work, and Contractor shall fully cooperate with such additional contractors and with any City employees concerned with such additional or related work, and shall coordinate the performance of work under this Contract and contract documents, with such additional or related work. Contractor shall not commit or permit any act which will interfere with the performance of work by any other Contractor or by any City employee.

8. SUBCONTRACTORS, ASSIGNMENT; SUCCESSORS-IN-INTEREST. Except as specifically authorized in the contract documents, Contractor shall not make any subcontract with any other party for furnishing any of the work and services contemplated under the contract documents or assign or transfer any interest in this Contract, without obtaining the express prior written consent of City. In any case, this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and assigns, if any.

9. NO THIRD-PARTY BENEFICIARIES. City and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide, any benefit or right, whether directly or indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.

10. PAYMENT OF LABORERS; PAYMENT OF TAXES.

10.1 Contractor shall:

10.1.1 Make payment promptly, as due, to all persons supplying to the Contractor labor and material for the prosecution of the work provided for in the contract documents (ORS 279B.220(1));

10.1.2 Pay all contributions or amounts due to the State Accident Insurance Fund incurred in the performance of this Contract (ORS 279B.220(2));

10.1.3 Not permit any lien or claim to be filed or prosecuted against the City on account of any labor or material furnished (ORS 279B.220(3)); and

10.1.4 Be responsible for all federal, state and local taxes applicable to any compensation or payments paid to the Contractor under this Contract and may to the Department of Revenue all sums withheld from employees under ORS 316.167. Unless the Contractor is subject to backup withholding, the City will not withhold from such compensation or payments any amount(s) to cover the Contractor's federal or state tax obligation (ORS 279B.220(4)).

10.2 If Contractor fails, neglects or refuses to make prompt payment of any claim for labor or services furnished by any person in connection with this Contract as such claim becomes due, City may pay such claim to the person furnishing the labor or services and charge the amount of the payment against funds due or to become due Contractor by reason of the Contract.

10.3 The payment of a claim in this manner shall not relieve Contractor or Contractor's surety from obligation with respect to any unpaid claims.

10.4 The Contractor shall promptly as due, make payment to any person, co-partnership or association or corporation furnishing medical, surgical and hospital care or other needed care and attention, incident to sickness or injury, to the employee of such Contractor, of all sums which the Contractor agrees to pay for such services and all moneys and sums which the Contractor collected or deducted from the wages of employees pursuant to any law, contract or agreement for the purpose of providing or paying for such service. (ORS 279B.230(1)).

10.5 Contractor and its subcontractors, if any, are subject to Oregon Workers' Compensation

Law, which requires all employers that employ subject workers who work under this Contract in the State of Oregon to comply with ORS 656.017 and provide the required workers' compensation coverage, unless such employers are exempt under ORS 656.126. Contractor shall ensure that each of its subcontractors, if any, complies with these requirements (ORS 279B.230(2)).

11. COMPLIANCE WITH APPLICABLE LAW. Contractor shall comply with all federal, state and local laws, regulations, executive orders and ordinances applicable to the Contract. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with the following laws, regulations and executive orders to the extent they are applicable to the Contract: (i) Titles VI and VII of the Civil Rights Act of 1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) ORS Chapter 659, as amended; (ix) all regulations and administrative rules established pursuant to the foregoing laws; and (x) all other applicable requirements of federal, state and municipal civil rights and rehabilitation statutes, rules and regulations. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to the Contract and required by law to be so incorporated. The City's performance under the Contract is conditioned upon Contractor's compliance with the provisions of ORS 279B.220, 279B.225, 279B.230, and 279B.235 which are incorporated by reference herein.

11.1 Contractor shall pay employees for services as stated in ORS 279B.235(1). The employee shall be paid at least time and a half for all overtime worked in excess of forty (40) hours in any one week, except for individuals who are excluded under ORS 653.010 to 653.261 or under 29 U.S.C. sections 201 to 209 from receiving overtime.

12. INSURANCE. Contractor shall obtain prior to beginning any work under this Contract and shall maintain in full force and effect for the term of this Contract, at Contractor's expense, comprehensive general liability to include bodily injury and property damage for at least \$1,000,000 combined single limit per occurrence and at least \$2,000,000 aggregate per project, and Automobile liability with a combined single limit coverage of not less than \$1,000,000 to include bodily injury and property damage and shall include coverage for owned, hired and non-owned vehicles, as applicable, for the protection of the Contractor and the City of Hillsboro. Contractor shall name the City of Hillsboro, its elected and appointed officials, officers, agents, employees and volunteers as additional insureds. The policies shall be primary to and non-contributory with any insurance or self-insurance carried by the City, issued by a company authorized to do business in the State of Oregon. The certificates shall provide that City will receive thirty (30) days' written notice of cancellation or material modification of the insurance contract at the address listed below. Contractor shall provide certificates of insurance and additional insured policy endorsement to City prior to commencement of any work under this Contract. If requested, complete copies of insurance policies shall be provided to City. Contractor shall be financially responsible for all pertinent deductibles, self-insured retentions and/or self-insurance used to satisfy these requirements. Self-insurance is subject to prior written approval from the City.

12.1 PROFESSIONAL LIABILITY INSURANCE. In addition to other insurance requirements stated above, and if this insurance is applicable, Contractor shall also provide City evidence of professional liability insurance in the amount of not less than \$1,000,000 combined single limit. Contractor shall keep in force and effect the professional liability policy for at least one year after the expiration of the contract with City. In any case, Contractor shall notify City in the event of a cancellation or reduction in limits. Unless such cancellation or reduction is immediately cured by Contractor, such cancellation or reduction constitutes a breach of this Contract.

13. **INDEMNIFICATION.** Contractor shall indemnify, defend, save and hold harmless the City of Hillsboro, its elected and appointed officials, officers, agents, employees and volunteers against all liability, claims, suits or actions of whatsoever nature, loss or expenses, including attorney fees, and against all claims, actions, judgments based upon or arising out of damage or injury or death to persons or property, but only to the extent caused by a negligent act or omission by the Contractor and anyone acting on Contractor's behalf in connection with, or incidental to, this Contract or the work to be performed hereunder; provided, however, that nothing herewith shall be construed to require indemnification of City attributable to its own negligence. In addition, Contractor expressly agrees to defend, indemnify and hold the City of Hillsboro, its elected and appointed officials, officers, agents, employees and volunteers against all liability, claims, suits, actions, loss or expenses, including attorney fees, arising out of or related to any claims that the Work, the Work Product, or any other tangible or intangible items delivered to City by Contractor may be the subject of protection under any state or federal intellectual property law or doctrine, or the City's use thereof, infringes any patent, copyright, trade secret, trademark, trade dress, mask work, utility design or other proprietary right of any third party.

14. **CONFIDENTIALITY.** No reports, information and data given to or prepared or assembled by Contractor under the contract documents shall be made available by Contractor to any individual or organization (except City) without the prior written approval of City.

15. **RECORDKEEPING.** Contractor shall maintain all fiscal records relating to this Contract in accordance with generally accepted accounting principles. In addition, Contractor shall maintain any other records pertinent to this Contract in such a manner as to clearly document the Contractor's performance hereunder. All such fiscal records, books, documents, papers, plans, and writings shall be retained by Contractor and kept accessible for a minimum of six (6) years, except as required longer by law, following final payment and termination of this Contract, or until the conclusion of any audit, controversy or litigation arising out of or related to this Contract, whichever date is later.

16. **ACCESS TO RECORDS.** Contractor agrees that City and its authorized representatives shall have access to all books, documents, papers and records of the Contractor which are directly related to the Contract for the purpose of making any audit, examination, copies, excerpts and transcripts.

17. **FOREIGN CONTRACTOR.** If Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies relative to this Contract.

18. **GOVERNING LAW; JURISDICTION; VENUE.** This Contract shall be governed and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively, "the claim") between City and Contractor that arises from or relates to this Contract shall be brought and conducted solely and exclusively within the circuit court of Washington County for the State of Oregon. If the claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. Contractor, by its execution of this Contract, hereby consents to the in personam jurisdiction of said courts.

19. **OWNERSHIP OF WORK PRODUCT.**

19.1 As used in this Paragraph 19, and elsewhere in this Contract, the following terms have the meanings set forth below:

19.1.1 "Contractor Intellectual Property" means any intellectual property owned by Contractor and developed independently from the Work.

19.1.2 “Third Party Intellectual Property” means any intellectual property owned by parties other than City or Contractor.

19.1.3 “Work Product” means every invention, discovery, work of authorship, trade secret or other tangible or intangible item and all intellectual property rights therein that Contractor is required to deliver to City pursuant to the Work.

19.2 All Work Product created by Contractor pursuant to the Work, including derivative works and compilations, and whether or not such Work Product is considered a work made for hire or an employment to invent, shall be the exclusive property of City. City and Contractor agree that such original works of authorship are “work made for hire” of which City is the author within the meaning of the United States Copyright Act. If for any reason the original Work Product created pursuant to the Work is not “work made for hire,” Contractor hereby irrevocably assigns to City any and all of its rights, title, and interest in all original Work Product created pursuant to the Work, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrine. Upon City’s reasonable request, Contractor shall execute such further documents and instruments necessary to fully vest such rights in City. Contractor forever waives any and all rights relating to original Work Product created pursuant to the Work, including without limitation, any and all rights arising under 17 USC §106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications.

19.3 In the event that Work Product created by Contractor under this Contract is Contractor Intellectual Property, a derivative work based on Contractor Intellectual Property, or is a compilation that includes Contractor Intellectual Property, Contractor hereby grants to City an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the Contractor Intellectual Property employed in the Work Product, and to authorize others to do the same on City’s behalf.

19.4 In the event that Work Product is Third Party Intellectual Property, a derivative work based on Third Party Intellectual Property, or a compilation that includes Third Party Intellectual Property, Contractor shall secure on City’s behalf and in the name of the City, an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the Third Party Intellectual Property employed in the Work Product, and to authorize others to do the same on City’s behalf.

20. **ERRORS.** Contractor shall perform such additional work as may be necessary to correct errors in the work required under this Contract without undue delays and without additional cost to City.

21. **TERMINATION.**

21.1 This Contract may be terminated at any time by mutual consent of both parties.

21.2 Contractor may terminate this Contract upon thirty (30) days’ written notice to City if City fails to pay Contractor pursuant to the terms of this Contract and City fails to cure within thirty (30) days after receipt of Contractor’s notice or such longer period of cure as Contractor may specify in such notice.

21.3 City, in its sole discretion, may terminate this Contract, in whole or in part, upon thirty (30) days notice to Contractor.

21.4 City may terminate this Contract, in whole or in part, immediately upon notice to Contractor, or at such later date as may be established by City in such notice, upon the occurrence of the following events: (i) federal or state laws, regulations or guidelines are modified or interpreted in such a way that the work or services provided under this Contract are prohibited or City is prohibited from paying for such work or services from the planned funding source; (ii)

Contractor no longer holds any license or certificate that is required to perform the work or services; or (iii) Contractor commits any material breach or default of any covenant, warranty, obligation, certification or agreement under this Contract, fails to perform the work or services under this Contract within the time specified herein or any extension thereof, or so fails to pursue the work or services as to endanger Contractor's performance under this Contract in accordance with its terms, and such breach, default or failure is not cured within ten (10) days after delivery of City's notice or such longer period as City may specify in such notice.

21.5 In the event of termination under paragraphs 21.1, 21.2, 21.3 or 21.4(i), Contractor's sole remedy shall be a claim for the sum designated for accomplishing the work or services multiplied by the percentage of work or services completed and accepted by City, less previous amounts paid and any claim or claims which the City has against Contractor. If previous amounts paid to Contractor exceed the amount due to Contractor under this paragraph 21.5, Contractor shall pay any excess to City upon demand.

21.6 In the event of termination under paragraphs 21.4(ii) or 21.4(iii), City shall have any remedy available to it in law or equity.

21.7 Upon receiving a notice of termination, Contractor shall immediately cease all activities under this Contract, unless expressly directed otherwise by City in the notice of termination. Further, upon termination, Contractor shall deliver to City all contract documents, information, works-in-progress and other property that are or would be deliverable had the Contract been completed. Upon City's request, Contractor shall surrender to anyone City designates, all documents, research or objects or other tangible things needed to complete the work or services.

22. **ATTORNEY FEES.** If a suit or action is filed to enforce any of the terms of this Contract, each party is responsible for their respective costs and fees, including attorney fees.

23. **FUNDS AVAILABLE AND AUTHORIZED, NON-APPROPRIATION OF FUNDS.** City has sufficient funds currently available and authorized for expenditure to finance the costs of this Contract, during the current fiscal year ending June 30, 2010. Contractor recognizes that the funding of services pursuant to this Contract is subject to annual appropriation by the City Council as required by the Oregon Local Budget Law, ORS 294.323 and related provisions, which appropriation may not be made in subsequent fiscal years. As such, the City may terminate this agreement at any time based on the City Council's non-appropriation of funds required to perform its obligations under this Contract.

24. **SEVERABILITY.** The parties agree that if any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

25. **FORCE MAJEURE.** Neither City nor Contractor shall be held responsible for delay or default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, City's or Contractor's reasonable control. Contractor shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.

26. **WAIVER.** The failure of City to enforce any provision of this Contract shall not constitute a waiver by City of that or any other provision.

27. **RECYCLABLE MATERIALS.** Contractor shall, to the maximum extent economically feasible

in the performance of this Contract, use recycled paper (as defined in ORS 279A.010(ee)), recycled PETE products (as defined in ORS 279A.010(ff)), and other recycled products (as "recycled product" is defined in ORS 279A.010(gg)).

28. **NOTICE.** Except as otherwise expressly provided in this Contract, any communications between the parties hereto or notices to be given hereunder shall be given in writing by personal delivery, facsimile or mailing, postage prepaid, to Contractor or City at the address or number set forth on the signature page of this Contract, or to such other addresses or numbers as either party may hereafter indicate pursuant to this paragraph 28. Any communication or notice so addressed and mailed shall be deemed to be given five (5) days after mailing. Any communication or notice delivered by facsimile shall be deemed to be given when receipt of the transmission is generated by the transmitting machine. To be effective against City, such facsimile transmission must be confirmed by telephone notice to the City Manager. Any communication or notice by personal delivery shall be deemed to be given when actually delivered.

29. **CONTRACTOR INFORMATION AND CERTIFICATION.**

29.1 Contractor shall provide Contractor's Social Security number or Contractor's federal tax ID number and the additional information set forth below. This information is requested pursuant to ORS 305.385 and OAR 125-246-0330(3). Social Security numbers provided pursuant to this paragraph will be used for the administration of state, federal and local tax laws.

Name (tax filing): _____

Address: _____

Citizenship, if applicable: Non-resident alien ☐ Yes ☐ No

Business Designation (check one):

☐ Professional Corporation ☐ Partnership ☐ Limited Partnership ☐ Limited Liability Company ☐ Limited Liability Partnership ☐ Sole Proprietorship ☐ Other

Federal Tax ID#: _____ - _____ or SSN#: _____ - _____ - _____

City may report the information set forth above in conjunction with any reports it makes to the Internal Revenue Service (IRS) under the name and social security number or taxpayer identification number provided.

29.2 The individual signing on behalf of Contractor hereby certifies and swears under penalty of perjury that: (a) the number shown on this form is Contractor's correct taxpayer identification; (b) Contractor is not subject to backup withholding because (i) Contractor is exempt from backup withholding, (ii) Contractor has not been notified by the IRS that Contractor is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Contractor that Contractor is no longer subject to backup withholding; (c) s/he is authorized to act on behalf of Contractor, s/he has authority and knowledge regarding Contractor's payment of taxes, and to the best of her/his knowledge, Contractor is not in violation of any Oregon tax laws named in ORS 305.380(4), including without limitation the state inheritance tax, gift tax, personal income tax, withholding tax, corporation income and excise taxes, amusement device tax, timber taxes, cigarette tax, other tobacco tax, 9-1-1 emergency communications tax, the homeowners and renters property tax relief program and local taxes administered by the Department of Revenue, including the Multnomah County Business Income Tax, Lane Transit District Tax, Tri-Metropolitan Transit District Employer Payroll Tax, and Tri-Metropolitan District Self-Employment Tax; (d) Contractor is an independent contractor as defined in ORS 670.600; and (e) the supplied Contractor data is true and accurate.

[signature page follows]

The Contractor and the City hereby agree to all provisions of this Contract.

Signed this _____ day of _____, 2010.

FOR THE CONTRACTOR:

FOR THE CITY:

Signature

Name (Printed)

Title

Address

City, State, Zip

Phone Number

Fax Number

Email Address

Attest:

City Recorder

Contract Administrator:

Mailing Address

150 East Main Street
Hillsboro, OR 97123

Telephone: 503-681-_____

Fax: 503-681-_____

Email: _____

www.ci.hillsboro.or.us

EXHIBITS FOLLOW ON SUBSEQUENT PAGES:

Exhibit A: _____

Exhibit B: _____

Exhibit C: _____

CERTIFICATION AND CONTRACT OFFER

Proposal Title: Asset Management, Work Order, and Maintenance Management System software solution

Proposal Due Date: 2:00 P.M. (PST), January 8, 2010

I, the undersigned, having carefully examined the above referenced RFP document, and all other related material and information agree to furnish Asset Management, Work Order, and Maintenance Management system software, equipment, and services to the City of Hillsboro ("City").

I further agree that I will at all times protect the City's information and not make it available to any other source than City, unless so directed by the City in writing.

I further agree that this offer to furnish Asset Management, Work Order, and Maintenance Management system software, equipment, and services will remain in effect at the fees proposed for a period of not less than one hundred and twenty (120) days from the date that proposals are due, and that this offer may not be withdrawn or modified during that time.

If this offer, or portion thereof, is accepted by the City and award is made thereon, I agree to enter into an agreement with the City to furnish Asset Management, Work Order, and Maintenance Management system software, equipment, and services as specified for the fees proposed.

I hereby certify that this proposal is genuine and that I have not entered into collusion with any other proposer(s), vendor(s) or any other person(s).

Authorized Signature

Date

Printed Name

Phone Number

Title

Tax Identification/SS #

Company Name

Address

RETURN THIS COPY (SIGNED) WITH YOUR PROPOSAL

Updated 6-9-2008

PROPOSED SOLUTION COSTS

Proposal Title: City of Hillsboro Asset Management, Work Order, and Maintenance Management System software solution

Proposal Due Date: 2:00 P.M. (PST), January 8, 2010

Item	Description	Total Cost
1. Proposed software licensing cost that meets the initial phase Scope of Work as specified in this RFP for 16 multi-department users. Distinguish between product modules and licenses as appropriate for your proposed solution.	a. <u>Public Works' Department</u> <u>4 users</u> - Sanitary and Storm Utility Sewer team • GIS Inventory Integration/ Management • GIS Interface • Work Order Management • Maintenance Management b. <u>Water Department</u> <u>4 users</u> - Water Distribution team • GIS Inventory Integration/ Management • GIS Interface • Work Order Management • Maintenance Management c. <u>Water Department</u> <u>4 users</u> - Water Treatment Plant team • GIS Inventory Integration/ Management • GIS Interface • Work Order Management • Maintenance Management	Total Cost: .

	<u>d. Parks and Recreation Department</u> <u>2 users</u> - Equipment Repair and Maintenance team • Equipment Inventory Management • Work Order Management • Maintenance Management <u>e. Information Services Department</u> <u>2 licenses</u> - Development and Production support licenses for all functionality listed above	
2. Proposed software licensing cost for up to 100 users for the following functionality in the Public Works, Water, Water Treatment Plant, Parks and Recreation, and Fleet and Facilities departments. Provide single-use and concurrent-use costs per module. Distinguish between product modules and licenses as appropriate for your proposed solution.	a. Work Order Management b. Maintenance Management c. Equipment Inventory Management d. GIS Inventory Integration/ Management e. GIS Interface f. Fleet Maintenance g. Facility Maintenance h. Mobile solution i. Development and Support licensing	Total Cost:

3. Proposed software licensing cost for a citywide site license for the following functionality: Distinguish between product licenses as appropriate for your proposed solution.	a. Work Order Management b. Maintenance Management c. Equipment Inventory Management d. GIS Inventory Management e. GIS Interface f. Fleet Maintenance g. Facility Maintenance h. Mobile solution i. Development and Support licensing	Total Cost:
4. Proposed Initial Setup and Configuration cost per Scope of Work	(see section 7.6)	Total Cost:
5. Proposed Integration cost for MUNIS (ERP)	(see section 7.7)	Total Cost:
6. Proposed Integration cost for Wonderware (SCADA)	(see section 7.7)	Total Cost:

7. Proposed Integration cost for Pipeworks (CCTV)	(see section 7.7)	Total Cost:
8. Proposed Integration cost for Time and Attendance	(see section 7.7)	Total Cost:
9. Proposed Training Plan and Options cost	(see section 7.8)	Total Cost:
10. Proposed Support and Maintenance Program costs	(see section 7.9)	Total Cost:
11. An hourly rate schedule for additional work that may be added to the Scope of Work requested by the City beyond the initial Scope of Work		
12. Pricing for any other additional services you may provide or recommend		

RETURN THIS COMPLETED FORM WITH YOUR PROPOSAL

Attachments: Technical and Functional Requirements and Vendor Questionnaire

Asset Management, Work Order, and Maintenance Management System

APPENDIX A - TECHNICAL REQUIREMENTS

ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Technical Requirements - System Interfaces					
7.3.1	Proposed solution is able to communicate with Tyler Technologies' MUNIS, the City's Financial Management System. For detailed information, please refer to Appendix E - System Integration Requirements				
7.3.2	Proposed solution is able to communicate with Invensys' Wonderware SCADA solution. For detailed information, please refer to Appendix E - System Integration Requirements				
7.3.3	Proposed solution is able to communicate with Peninsular Technologies' Pipe Tech CCTV solution. For detailed information, please refer to Appendix E - System Integration Requirements				
Technical Requirements - System Application					
Preface each requirement with "The proposed solution..."					
7.3.4	Is compatible with Microsoft desktop products: Windows XP, Windows Vista, Windows 7, Office Suite 2007, and Microsoft Project 2007				
7.3.5	Is compatible with Microsoft server products: Exchange 2007, Windows Server 2003/2008, Windows SharePoint Services, and SQL Server 2005/2008				
7.3.6	Runs natively in Microsoft Windows Server 2003/2008				
7.3.7	Operates on Microsoft SQL Server 2005				
7.3.8	Integrates with Microsoft SQL Reporting Services?				
7.3.9	Is entirely a web based solution.				
7.3.10	Allows a system administrator to highly customize user interfaces using built-in tools				

7.3.11	Has ability for employee data to be populated from another source such as Windows Active Directory, or MUNIS.				
7.3.12	Has ability to import and export major file formats including Microsoft Office products (Excel, Access, etc.).				
7.3.13	Has a mobile in-field solution for data entry, update, and viewing via real-time data access (i.e. wireless) or by syncing (i.e. standalone).				
7.3.14	Has ability to view, send, receive and sync data wirelessly, with a docking station, and with PDA's and other mobile and wireless devices.				
7.3.15	Ability to add, delete, and maintain assets from the City's ESRI based GIS system.				
7.3.16	Has a GIS interface that has ability to view, send, receive, and sync data with the proposed Asset Management, Work Order, and Maintenance Management system solution?				
7.3.17	Allows the City's ESRI based GIS system to manage asset inventory				
7.3.18	Is compatible with ESRI ArcGIS product versions 9.2, 9.3, and 9.3.1 for ArcGIS Server, ArcSDE, ArcEditor, and ArcView				
7.3.19	Operates on ESRI ArcGIS Server 9.3 and ArcSDE 9.2				
Technical Requirements - Security Preface each requirement with "The proposed solution..."					
7.3.20	Utilizes Windows Active Directory users and groups for authentication.				
7.3.21	Has role based security based on Windows Active Directory				
7.3.22	Has security management tools that allow easy management and reporting functions in order to ensure security access is maintained.				

Asset Management, Work Order, and Maintenance Management System

APPENDIX B - FUNCTIONAL REQUIREMENTS

ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements - Inventory Control Preface each requirement with "The proposed solution (has)..."					
7.4.1	Ability to assign assets to A) individuals, B) Buildings, C) rooms within buildings, D) vehicles, E) Land parcel, F) Departments/Divisions (Public Works/Traffic), etc.				
7.4.2	Ability to have a parent-child relationship with assets. For example, a Park maintenance truck may have shovels, rakes, and trash cans assigned to it.				
7.4.3	Ability to use a bar code auto check-in/out feature				
7.4.4	Ability to populate history from existing data sources (e.g. spreadsheets, databases, GIS, etc)				
7.4.5	Allows for associated images, videos, or documents to be attached to a service request/work order or asset. For example, a schematic showing details of a water valve that needs to be repaired.				
7.4.6	Offers an attribute edit criteria field to be associated with specific attribute fields to streamline the data entry process and ensure data integrity. This will cause a drop down selection list to be made available to the user when entering data in the attribute field.				
7.4.7	Ability to track Hazardous materials and MSDS information, provide remote access to MSDS information, through attachments or otherwise, and integrate that information into scheduling and work order notifications.				
7.4.8	Ability to track assets in numerous categories, e.g. Water mains, buildings, equipment within a plant, vehicles, keys, space, etc.				
7.4.9	Ability to interface with standard bar code readers.				

7.4.10	Ability to track and print CAD files for facilities and locations inside of facilities, and interface with work orders and inventory.				
7.4.11	Allows the user to define the specific Asset Inventory Attribute Fields (data fields) that fit their specific needs.				
7.4.12	Ability to add or delete attribute fields to an existing asset inventory definition without affecting existing data.				
7.4.13	The system allows the user to print single or multiple inventory records.				
7.4.14	The Asset Inventory Screen allows for the manual or automatic entry of information about vehicle mileage or equipment usage (hours or user defined usage type). The system has the ability to link this information to the scheduled work order feature for generation of pre-defined scheduled work orders.				
7.4.15	The Asset Inventory Screen allows for the tracking of serialized equipment/components.				
7.4.16	The Asset Inventory Screen allows for the entry of parts information relating to a particular asset inventory item.				
7.4.17	The system allows the user to define one or more documents, including graphics, to be attached to an asset inventory item. These documents will then be displayed on any work order that includes the specified asset inventory item.				
7.4.18	The system allows the user to link asset inventory items to one another in a parent-child relationship, establishing a hierarchy of related asset inventory items.				
7.4.19	The Asset Inventory Screen allows for the retrieval and display of node, line and component inventory infrastructure assets by use of a variety of selection criteria including component number, and user defined fields and values.				
7.4.20	The system allows for the maximizing and minimizing of the data form on the Asset Inventory Screen.				
7.4.21	Ability to freeze inventory to prevent inventory action within a Department, Storage Facility, and/or by Type.				
7.4.22	Ability to print inventory worksheets by user selectable criteria.				
7.4.23	Ability to enter inventory counts from the worksheets either manually or by bar code.				

7.4.24	Ability to generate physical inventory discrepancy report.				
7.4.25	Ability to automatically update inventory adjustments with appropriate approval and security.				
7.4.26	Ability to track equipment and warranty information and service contracts.				
7.4.27	Ability to notify appropriate people regarding warranty information and service contracts.				
7.4.28	Ability to check warranty information and add user manual data, pictures, etc.				
7.4.29	The system adjusts the average cost of a part when receiving new stock.				
7.4.30	The system allows the user to create vendor and manufacturer information including name, address, contact name, telephone number, fax number, email address and payment terms.				
7.4.31	The system allows the user to define and create date fields and appropriate values for part locations, vendors, and manufacturers.				
7.4.32	The system displays the vendor name, vendor part ID and comments on the parts inventory screen.				
7.4.33	The system allows the user to create stock location name and address information.				
7.4.34	The system allows the user to create, at a minimum, parts transactions for quantity adjustments, receiving, issuing and location transfers.				
7.4.35	The system retains stock information including quantity on hand, minimum quantity, order unit quantity, order due notification, cost per unit, unit of measure and transaction dates.				
7.4.36	The parts inventory feature interfaces with the work order feature to allow parts used through a work order to be issued from the selected location.				
7.4.37	Ability to accommodate an unlimited number of stock and non-stock inventory items.				
7.4.38	Ability to establish, maintain, adjust, delete and view inventory stock item records in real time with appropriate security.				

7.4.39	Ability to allow for electronic approval for receipts, issues, and other related inventory functions with appropriate security.				
7.4.40	Ability to provide charge out stock withdrawn from inventory to the requesting department.				
7.4.41	Ability to provide for multiple warehouses.				
7.4.42	Ability to provide inventory in multiple funds at the same or at multiple locations.				
7.4.43	Ability to notify appropriate users when reorder points have been reached.				
7.4.44	Ability to automatically generate a purchase order, with appropriate approval(s) when reorder points have been reached.				
7.4.45	Does the proposed solution provide a visual interface or image of the asset inventory such as street sign images, or equipment parts and pieces?				
Ability to maintain and track the following information for inventory items:					
7.4.46	Item description (short)				
7.4.47	Text description (long)				
7.4.48	Unit of measure				
7.4.49	Unit Cost				
7.4.50	State price				
7.4.51	Actual price				
7.4.52	Bulk Cost				
7.4.53	Average price (calculated value)				
7.4.54	Freight Cost				
7.4.55	Other costs as determined by user				
7.4.56	Vendor number				
7.4.57	Primary Vendors				
7.4.58	Min-Max Points				
7.4.59	Quantity on hand				
7.4.60	Quantity on order				
7.4.61	Quantity received on orders				

7.4.62	Quantity on back-order				
7.4.63	Ordered year-to-date				
7.4.64	Received year-to-date				
7.4.65	Issued current period				
7.4.66	Issued year-to-date				
7.4.67	Commodity code				
7.4.68	Item Number				
7.4.69	Shelf Life or Expiration Date				
7.4.70	Warranty term and expiration				
7.4.71	Location				
7.4.72	Component items (e.g. subtitles of a series of books)				
7.4.73	Text field for miscellaneous entry				
7.4.74	Other user defined fields				
Ability to update stock item data and maintain all the specific data for:					
7.4.75	Purchases				
7.4.76	Returns to stock				
7.4.77	Returns to supplier				
7.4.78	Adjustments				
7.4.79	Transfers				
7.4.80	Receipts				
7.4.81	Requisitions				
7.4.82	Backorders				
7.4.83	Defective or Damaged Parts Returned to Vendor				
7.4.84	Issuance of Inventory				
7.4.85	Surplus or Junk Items				
7.4.86	Recalls				
7.4.87	Other user defined items				
7.4.88	Ability to block inventory requisitions based on user-defined characteristics (e.g., location does not have tile so cannot request wax).				

7.4.89	Ability to prioritize the use of specific inventory items.				
7.4.90	Ability to provide on-line stock catalogs.				
7.4.91	Ability to accommodate a user-defined stock item table.				
7.4.92	Ability to automatically assign stock requisition numbers.				
7.4.93	Ability to maintain an audit trail of all automatic inventory processes.				
7.4.94	Ability to allow inventory to be classified by purchasing commodity code.				
7.4.95	Ability to merge multiple inventory items to a new or existing inventory item with an audit trail.				
7.4.96	Ability to verify that inventory parts to be merged have no associated open PO's.				
7.4.97	Ability to track expiration/spoil date by specific stock items				
7.4.98	Ability to track hazardous qualities of inventory items as identified by the hazardous material number.				
7.4.99	Ability to track Hazardous materials and MSDS information, provide remote access to MSDS information and integrate that information into scheduling and work order notifications.				
7.4.100	Ability to maintain a history of part number if the manufacturer's part number changes with ability to cross-reference manufacturer's part number (s) with City warehouse part number.				
Ability to track and produce a hard copy stock tag (barcode label) which includes the following information:					
7.4.101	Stock location				
7.4.102	Manufacturer's part number				
7.4.103	Distributor's part number				
7.4.104	Manufacturer name				
7.4.105	Distributor name				
7.4.106	Item number				
7.4.107	Unit of measure				
7.4.108	Issuing unit by location				
7.4.109	Cost				
7.4.110	Commodity Code				

7.4.111	Reference Field (user defined)				
7.4.112	Part Number				
7.4.113	Other fields as defined by users				
7.4.114	Ability to accommodate items with zero dollar value and/or zero quantity.				
7.4.115	Ability to provide a variable length field to contain requirements for maintaining or servicing an item (i.e. expiration date of a stock item, unused item must be serviced if idle for x amount of time, etc.).				
Ability to provide a multi-level location structure to include:					
7.4.116	Building, room, bin and/or desk				
7.4.117	Warehouse (for example - central supply)				
7.4.118	Storage Area (for example - 2nd floor NW quadrant)				
7.4.119	Aisle				
7.4.200	Bin				
7.4.201	Shelf				
7.4.202	Rack				
7.4.203	Cart				
7.4.204	Vehicle				
7.4.205	Required environmental conditions for the specific location				
7.4.206	Other fields as defined by user				
7.4.207	Ability to electronically determine most efficient pick-up location.				
7.4.208	Ability to schedule pick-up and transfer of inventory utilizing the most efficient process.				
7.4.209	Ability to allocate purchases and stock to various departments, warehouses, section of warehouse, cost center, etc. (i.e., drop shipping).				
7.4.210	Ability to charge parts to a specific fleet unit directly from the Inventory module, and ability to charge parts to fleet #, piece of equipment, physical address, building, etc.				
7.4.211	Ability to provide primary and multiple secondary locations of stocked items.				

7.4.212	Ability to indicate stock on hand by each location or multiple locations.				
7.4.213	Ability to record transfer of inventory stock among locations.				
7.4.214	Ability to allow users to specify a mark-up or overhead cost for each individual commodity code or item.				
7.4.215	Ability to provide the following inventory costing methods: actual cost, moving average, Last in Last out (LIFO), First in First out (FIFO) and replacement.				
7.4.216	Ability to provide user-defined costing methods.				
7.4.217	Ability to specify costing method by user defined criteria.				
7.4.218	Ability to automatically adjust item costs in the inventory system based upon adjustments made in accounts payable system.				
7.4.219	Ability to create issue tickets automatically with appropriate approval, based on electronic supply requisitions.				
7.4.220	Ability to generate issue tickets at prescheduled times.				
7.4.221	Ability to generate trip/delivery tickets.				
7.4.222	Ability to accommodate scheduling of deliveries.				
7.4.223	Ability to bundle items into "carts". A cart consists of items which are always ordered together.				
7.4.224	Ability to place a cap on the quantity and dollar amount of an item that can be issued to a requestor during a specified time period with override approval, with appropriate security				
7.4.225	Ability to compare stock items received to open requests for stock items to determine which requests (i.e., backorders) may be filled.				
7.4.226	Ability to provide an automatic reorder process for all, or selected, stock items including electronic request and approval.				
7.4.227	Ability to track item usage and provide automatic notification to appropriate user of all items under the minimum on-hand quantity or at the reorder point.				
7.4.228	Ability to define, by item, the variables used in determining reorder points and reorder quantities.				
7.4.229	Ability to provide for manual overrides of reorder points and reorder quantities.				

7.4.230	Ability to automatically update inventory on-order information at the time that a requisition is created.				
7.4.231	Ability to edit, return, cancel, or reject any stock requisition.				
7.4.232	Ability to provide on-line inventory adjustment capabilities with proper approval levels.				
7.4.233	Ability to provide automatic cycle count scheduling.				
7.4.234	Ability to select and sequence physical inventory and cycle count documents.				
7.4.235	Ability to archive history information for stock items with a zero on-hand quantity and no activity over a user-defined time period.				
7.4.236	Ability to sort and group inventory items by user selectable fields for display and printed reports.				
7.4.236.5	Has or is integrated with the Federal or State of Oregon approved sign inventory library (MUTCD, etc.)				
ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements – GIS functions Preface each requirement with “The proposed solution (has) ...”					
Locating Work Orders					
7.4.237	Allows the user to develop a work order that is attached to a specific facility shown on a map of the utility. The user must be able to select the utility feature on a display of the utility map.				
7.4.238	Allows the user to locate a work order on a map by an address.				
7.4.239	Allows the user to develop and locate a work order with a point on a map. The point does not have to be associated to a map feature of a utility facility.				
Allows the user to locate all other work orders on a map displayed within a user specified distance from the following:					
7.4.240	A point picked by the user				

7.4.241	A utility feature picked by the user				
7.4.242	A set of utility features picked by the user				
7.4.243	An existing work order				
7.4.244	Allows the user to select an area on the display of the utility map and the system will display all work order contained within the area				
7.4.245	Ability to display work order(s) on a GIS map.				
7.4.246	Ability to select assets on a map and create work order(s) from the GIS interface.				
Selecting Work Orders					
7.4.247	The proposed solution allows the user to select the type of work orders that will be displayed on a utility map display or printed in a utility map based on the following:				
7.4.248	Status of a work order such as pending, open, or closed work orders.				
7.4.249	Type of work orders such as planned maintenance or emergency work orders				
7.4.250	Age of work orders				
7.4.251	Date of work orders				
7.4.252	Work orders complete within a date range				
7.4.253	Work orders complete by a specific crew				
7.4.254	Work orders that have a cost within a user specified range				

7.4.255	Combinations of all the above factors				
Locating Facilities					
7.4.256	Allows the user to select a work order and the system will show the location of the facilities on a display of the utility map. The map display scale and display area will be adjusted to present the facilities in the selected work order in the center of the screen and at a readable scale.				
7.4.257	Allows the user to select a group of work orders and the system will show the location of all facilities in all of the selected work orders.				
7.4.258	Allows the user to specify an address and the system will show the utility features that serve the address.				
7.4.259	Allows the user to locate all utility features that are within a specified distance of an address.				
7.4.260	Allows the user to locate all other utilities within a specified distance of a selected facility or work order.				
7.4.261	Allows the user to specify the type, status, and age of the work orders to be mapped				
Identifying Utility Feature Characteristics					
7.4.262	The proposed solution allows the user to determine the following characteristics of all facilities in the vicinity of the work order that can be included in a work order:				
7.4.263	Size of facility				
7.4.264	Age of facility				
7.4.265	Material				
7.4.266	Depth				
7.4.267	Type of ground surface above an underground facility				

7.4.268	Past work orders associated with the facility				
Manage Work Crews					
7.4.269	Allows the user to use the system to route work crews to work orders				
7.4.270	Allows the user to use the system to schedule or assign work orders to work crews.				
7.4.271	Allows the users to identify the work crews that are assigned to work in an area or near a selected address or point.				
Network Tracing					
7.4.272	Allows the user to identify all sewer and storm lines that are upstream and downstream of a work order				
7.4.273	Allows the user to identify the customers that are in the area served by a sewer or storm line affected by a work order				
Water Main Isolation Management					
7.4.274	Allows the user to locate all valves that must be closed in order to isolate a water system facility				
7.4.275	Allows the user to identify all the customers that will be affected by the closure of a water system facility such as a water main, system valve, a water pump station, or a water reservoir.				
7.4.276	Allows the user to locate the water valves that must be closed to isolate a fire hydrant.				
7.4.277	Determines the location of an address from address points in the City's GIS system				

ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements - Work Order Management Preface each requirement with "The proposed solution (has) ..."					
7.4.278	Ability to receive, track and allocate customer inquiries, complaints and work requests via phone, in person, fax, mail, email, or website.				
7.4.279	Ability to track or search for requests based on caller name, date, location reported, time opened, or various other combinations of data.				
7.4.280	Ability to track or search for requests based on caller name, date, location reported, time opened, or various other .				
7.4.281	Allow work order to be initiated from the request if needed with data from the request populating the order.				
7.4.282	Allow multiple requests to be linked to an existing work order.				
7.4.283	Ability to assign a priority code to requests both automatically or manually and be able to escalate or reduce priority.				
7.4.284	Provide automatic and manual generation of correspondence and status of work to customers via email or letter.				
7.4.285	Closing of a work order also closes the associated customer inquiry or service request.				
7.4.286	Work orders can be initiated, tracked, monitored, searched, reported from initiation to completion.				
7.4.287	Must be able to query by type, asset, location, status, or any data parameter combination thereof.				
7.4.288	Allows for associated images, videos, or documents to be attached to a service request and work order.				
7.4.289	Ability to automatically notify technician when ordered material is available for pick-up.				
7.4.290	The system has integrated OSHA mandatory requirements into work orders.				

7.4.291	The system allows the user to duplicate the current work order (including history, costs, parts, and tasks), eliminating the need for repetitive data entry.				
7.4.292	The system allows the user to add information to a work order at any time without affecting the existing information.				
7.4.293	The system will display the total cost (personnel and resources) of a work order, both open and closed, at all times.				
7.4.294	The system allows for work tasks to be closed while keeping the work order open.				
7.4.295	The system allows the user to complete a group of selected work orders at one time.				
7.4.296	The system includes a comment field in the Work Order Generation form allowing users to add comments to all scheduled work.				
7.4.297	The Work Order Generation form allows the user to create a separate work order for each asset inventory item or a composite work order containing all asset inventory items.				
7.4.298	The Work Order Generation form allows the user to specify the opened date, required date, and priority as well as include additional comments in the generated work orders.				
7.4.299	The system allows the user to preview and print a summary list of generated scheduled work orders.				
7.4.300	The system shall allow the creation of Work Order Templates, which contain work order activities, costs, parts, tasks for a particular job type, and tools. The system allows a user to select a work order template, if required, when a new work order is created.				
7.4.301	The user shall have the ability to edit template information for a particular work order without affecting the original master template.				
7.4.302	The system will allow work orders to be copied into other work orders.				
7.4.303	The system will track the estimated vs. actual usage of work order items to be tracked.				
7.4.304	The system allows the user to enter data for a transaction type, location, bin number, unit of measure, transfer location, cost per unit, quantity, order number and comments.				

7.4.305	The system will automatically generate an appropriate work order number for a transaction as required and the total cost of the transaction (number of units multiplied by unit cost) will be calculated.				
7.4.306	The system automatically enters the transaction number, transaction date and user ID when a transaction detail line is entered.				
7.4.307	The system includes unit of measure, average cost, comments, obsolete, and minimum/maximum quantity information in the parts form.				
7.4.308	A Parts Inventory feature is offered as an integrated component of the proposed Work Management System. This feature has the ability to operate with work order processing and allow for parts allocated to open work orders to be removed from stock on-hand.				
7.4.309	The system notifies the user when parts inventory falls below pre-determined minimum quantity levels.				
7.4.310	Ability to track work performed for other agencies.				
7.4.311	Ability to track contracted services.				
7.4.312	System allows service requests to be tracked separately from work orders, allowing multiple requests to be tied to a single work order, records complete history of all maintain activities and accounts for those costs including personnel, materials, equipment and contractors. Manages the inventories of said equipment.				
7.4.313	System has the ability to provide technicians with detailed component information – mechanical, electrical, and instrumentation.				
7.4.314	Work order system identifies inventory (child assets) associate with components (parent assets) and their availability.				

ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements - Service Management/Scheduling/Preventative Maintenance Preface each requirement with "The proposed solution (has) ..."					
7.4.315	The System shows past activities and allows scheduling, generating and tracking of maintenance activities and maintains a history of all activities including all costs.				
7.4.316	The system keeps a complete maintenance history allowing for analysis of assets and performance of assets. It records and tracks customer service and is able to generate reports of various natures of services.				
7.4.317	The system tracks when and where parts & materials have been issued and posts the transaction against the appropriate inventory item.				
7.4.318	The system allows the entry and/or the selection of a time interval and/or milestone interval including years, months, weeks, days, hours (run time), number of uses, etc.				
7.4.319	The system must provide a single screen that aggregates all items requiring approval for easy access by the approver. This use of multiple screens to conduct basic functions (i.e. Work Order Creation, Approval, and/or Completion) is not desirable.				
7.4.320	The system allows the user to search and display scheduled work orders by a combination of criteria to include; type, item ID, user, value, work order template, location and scheduled date range.				
7.4.321	The system allows the user to link a scheduled work order to one or more asset inventory items, either by type, inventory ID, or user field and value.				
7.4.322	The system allows the user to link one or more addresses to a scheduled work order in lieu of, or in addition to, asset inventory.				

7.4.323	The system allows the user to specify one or more time periods during which the scheduled work orders should not be generated. The user is also given the option to specify that these dates should be enforced every year. For example, not scheduling Work Orders for specific people when they are on vacation.				
ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements - Usage/Tracking Logging Preface each requirement with "The proposed solution (has) ..."					
7.4.324	Allows the creation of preventative scheduled and reactive work order that can be scheduled for the future and/or on a recurring basis.				
7.4.325	The system provides for documenting equipment warranty information and tracking warranty periods with automated expiration reminders.				
7.4.326	The system allows the creation of Scheduled Work Orders based on any required elapsed period of time or user defined schedule type such as mileage, hours, event, etc.				
7.4.327	The system allows the user to specify a combination of scheduling criteria such as a number of miles or a period of time, whichever comes first.				
7.4.328	The system allows the user to link scheduled work orders to one another in a parent-child relationship (i.e. 15,000-mile service should also include work done as part of the 5,000-mile service), eliminating the need to enter redundant information.				
7.4.329	The system issues inspections, system operations, and repair/replacement work orders automatically via email or print to the assigned user.				

ID	Requirements	Yes	No	Available via 3rd Party or Workaround	Comments
Functional Requirements - Reporting / Querying Preface each requirement with "The proposed solution (has) ..."					
7.4.330	Ability to generate and print bin labels.				
7.4.331	Ability to provide inventory detail and summary reports sequenced by location.				
7.4.332	Ability to create physical inventory reports, including the following:				
7.4.333	Exception report of quantity variances				
7.4.334	Inventory value with value variance				
7.4.335	Ability to produce, scan and read bar codes and sku numbers.				
7.4.336	Does the proposed solution include reporting services?				
7.4.337	Does the proposed solution integrate with Microsoft SQL reporting services?				
7.4.338	Ability to copy data from any screen report and paste into any other application.				
Ability to produce the following reports by user selected criteria:					
7.4.339	Inventory stock catalog by user defined criteria (e.g. office supplies)				
7.4.340	Inventory Count report				
7.4.341	Inventory Status report				
7.4.342	Departmental Charge Summary Report				
7.4.343	Cumulative purchases				
7.4.344	Usage year-to-date or user defined period				
7.4.345	Inventory by Bin Location and Alternate Bin Location				
7.4.346	Inventory Item List by user selected fields				
7.4.347	Inventory Turnover Ratio by SKU, item, and/or item type				
7.4.348	Inventory Carrying Costs				
7.4.349	Receiving Activity by Receiver				

7.4.350	Delivery Time for Warehouse Requests				
7.4.351	Internal delivery performance				
7.4.352	Ability to produce ad hoc queries from any field within the inventory module.				
Functional Requirements - Project and Contract Management Preface each requirement with "The proposed solution (has) ..."					
7.4.353	Ability to track & report labor (fully Burdened), equipment, and materials costs for projects.				

Asset Management, Work Order, and Maintenance Management System

APPENDIX C - VENDOR QUESTIONNAIRE

Vendor and Technical Support	
7.5.1	Does the manufacturer maintain a support call-in center for problems? If yes, please list the days and hours and location of call centers.
7.5.2	Does the vendor provide on-site assistance if required?
7.5.3	Does the vendor have a published life-cycle policy for software? If so, please provide a copy.
System Application	
7.5.4	Is the system administration application accessible from any workstation on the LAN/WAN?
7.5.5	Is the system administration application performed through a standard web browser? If yes, what web browsers are supported and are any special third party tools required to run the application such as Java or Microsoft's .Net framework? If not, what are the equipment requirements to run the client?
7.5.6	Does the proposed solution require the installation of software on desktop PCs for end user use?
7.5.7	Can remote sites be managed from a centralized location?
7.5.8	Is a separate license required for each workstation that will need to administer the system?
7.5.9	Is there a time limit to the number of administrators that can be logged onto the system at one time?
7.5.10	Does the proposed solution have online help?
7.5.11	Does the proposed solution support a USB or a Bluetooth barcode scanner?
7.5.12	Please describe how your system tracks the full history of an asset, including disposition?
7.5.13	Does the work order interface allow a user to view all closed, open, and unassigned work in a single view (like in a list-like format)? If not, describe how it is viewed.

7.5.14	Does the proposed solution have a published API or SDK programmers/developers can develop against?
7.5.15	Does the proposed solution have a large network and community of developers who are certified to develop for the proposed solution?
7.5.16	What is the maximum number of users supported by the proposed system?
7.5.17	Does the proposed solution have a GIS interface that allows dynamic two-way data exchange with the work management and asset inventory modules? Can a user update asset or work order information from the GIS interface?
7.5.17.5	Is the proposed solution a Java or a .Net solution? Please explain what technologies your product is developed or architected on.
7.5.18	Does the proposed solution offer a mobile solution? If so, is it a wireless solution or a standalone solution? Does it allow synchronization when brought into the office, or real-time dynamic data exchange in the field? Does the mobile solution include GIS functionality? If so, what are the differences, if any, between the mobile GIS functionality and the non-mobile GIS functionality?
7.5.19	Please describe how your proposed enterprise solution separates assets, work orders, scheduling, etc for multiple Departments and/or Divisions? For example, Parks and Recreation equipment maintenance; Fleet maintenance, and Public Works/Operations Division sign maintenance.
7.5.20	Can a system administrator customize the interface to the end users needs? If yes, what tools are required and to what extent can the system be customized?
7.5.21	The system must be easy to use and understand, with the ability to customize everything from user interfaces for specific users to customizing workflow. In addition, the system must allow for customizable on-line help that illustrate custom configurations. Please describe how these features are developed, maintained, and secured within your enterprise system?
7.5.22	The system must provide a comprehensive set of "canned" reports. It must also have the ability to store and maintain custom reports available to selected end-users and/or groups. Please describe how reports are stored and managed within your system? It is highly desirable that reports utilize MS SQL Reporting Services (VB.NET).
System Maintenance and Upgrades	
7.5.23	When system updates are performed, must the system be shut down, restarted, or rebooted?
7.5.24	When a client or station software updates are performed, must the system be shut down or can these types of maintenance activities be performed while the system is online?
7.5.25	How frequent are your upgrades and what do they typically cost?

Vendor and Product Information	
7.5.26	How long has the manufacturer of the proposed solution been in business?
7.5.27	Does the manufacturer install the product or do they use business partners?
7.5.28	Is the proposed solution currently used in a Water or Sewer Treatment Plant environment? If yes, please provide a list of those clients with contact information.
7.5.29	Is the proposed solution presently in use in Public Works, Water, and Parks and Recreation departments in local governments with populations of 80,000 or more similar to the City of Hillsboro? If yes, please list clients.
7.5.30	Please describe the number of implementations conducted for customers in the last three years. Group these implementations by numbers of end-users, dollar cost of engagements, and scope of engagements.
7.5.31	Describe the market drivers most influencing your product development plans. Explain your company's vision and direction for your current product and service line, including plans for additional product lines and support for emerging technologies.
7.5.32	Provide a list of your future planned products and services with anticipated release dates.
7.5.33	Does your proposed solution product line have an integrated permitting and/or land use module?
7.5.34	Does your proposed solution product line have an integrated document management module?

APPENDIX D

Geographic Information System (GIS)

Asset Management, Work Order, and Maintenance Management System RFP

GIS Overview

The City has a mature Geographic Information System (GIS) based on Environmental Sciences Research Institute's (E.S.R.I.'s) ArcGIS and ArcSDE products. GIS is a functional component of the Utility Asset and Inventory Management and Work Order system. The source data for Sanitary, Storm, and Water asset inventory resides in our GIS. The functional areas of work management, service management, scheduling and calendaring, inventory control, and reporting must be highly integrated with our existing GIS Infrastructure and Data Sources. The system must be capable of two-way integration with the GIS for scheduling preventative maintenance and inspections, and generating and completing work orders. A mobile GIS component is also desired.

GIS Utility Data and Structure

Water GIS Features

Feature Classes:

Backflow Devices, Cathode Test Stations, Fittings, Hydrants, Interconnections, Mains, Services, Meters, Sample Stations, Valves, Vaults and Reservoirs

Common fields seen throughout the Water feature classes:

- Lifecycle status; user chooses from a list
- Data source; user chooses from a list
- User that entered the information
- Date the feature was entered into the system
- Date the feature was updated; data or geometry
- GPS information, as applicable

Backflow Devices (19 fields)

Major fields:

- Type; user chooses from a list
- Device serial number
- Device size; user chooses from a list
- Comments
- Size of the related vault containing the backflow device; user chooses from a list
- Vault entry permit requirements; user chooses from a list
- Safety notes for maintenance
- Information on any related meters associated with the backflow device
- Type of back flow assembly; user chooses from a list

Cathode Test Stations (13 fields)

Major fields:

- Comments
- Size
- Installation Date
- Anode station (Yes/No)
- Text entry for connections to lines, services, meters and valves

Fittings (10 fields)

Major fields:

- Type; user chooses from a list
- Comments

Hydrants (18 fields)

Major fields:

- Number of ports; users chooses from a list
- Hydrant ID number
- Owner; user chooses from a list
- Location status of the hydrant; user chooses from a list
- Comments
- ID number used in modeling software
- Public access hydrant number
- Flow testing; if the hydrant has been tested, and the date of the test
- Gauge Hydrant information (text)

Interconnections (13 fields)

Major fields:

- Jurisdiction connecting to; user chooses from a list
- Diameter of connection
- Comments
- Record Drawing number
- Meter Size

Mains (16 fields)

Major fields:

- Type; user chooses from a list
- Material; user chooses from a list
- Diameter; user chooses from a list
- Easement; user specifies yes or no
- Easement number, if the above is yes
- If the mainline is Cased

- Operation Date
- Record Drawing number
- ID number used in modeling software
- Owner; user chooses from a list

Services (9 fields)

Major fields:

- Type;
- Material
- Diameter
- Comments

Meters (21 fields)

Major fields:

- Meter ID
- Size
- Direction
- Address; text
- Comments
- Cycle
- Depth
- Related Vault Size; user chooses from a list
- Vault entry permit requirements; user chooses from a list
- Safety notes for maintenance
- ID number for automatic meter reading
- Customer classification; user chooses from a list

Sample Stations (11 fields)

Major fields:

- Comments
- Location description
- Station ID number

Valves (12 fields)

Major fields:

- Type of valve; user chooses from a list
- Diameter; user chooses from a list
- Location Status of the Valve; user chooses from a list
- Valve ID number
- Comments
- Depth

Vaults (18 fields)

Major fields:

- Type; user chooses from a list
- Comments
- Size; user chooses from a list
- Depth
- Vault entry permit requirements; user chooses from a list
- Safety notes for maintenance
- PRV Sizes (up to two)
- Meter Sizes (up to two)

Reservoirs (7 fields)

Major fields:

- Owner
- Size
- Elevation
- Comments
- Record Drawing number

Sanitary Sewer GIS Features

Feature Classes:

Mainlines, Manholes, Laterals, and Fittings

Common fields seen throughout the Sanitary Sewer feature classes:

- Record Drawing Number
- Owner; user chooses from a list
- Jurisdiction responsibility for maintenance; user chooses from a list
- Governing Jurisdiction's unique identification number

Mainlines (30 fields)

Major fields:

- Type; user chooses from a list
- Life Cycle Status; user chooses from a list
- Material; user chooses from a list
- Diameter; user chooses from a list
- Treatment plant that receives the flow; user chooses from a list
- Flag for the North Trunk line, for billing (yes/no)
- Rehabilitation flag (yes/no)
- Rehabilitation type; user chooses from a list
- Easement Flag (yes/no)
- Asset needs verification or research (yes/no)
- Distance between manholes
- Invert elevation at start
- Invert elevation at end
- Slope of the line
- Cleaning run ID number
- Drainage Basin; user chooses from a list
- Operation Month
- Operation Year
- TV Inspection Date

Manholes (21 fields)

Major fields:

- Type; user chooses from a list
- Description; user chooses from a list
- Size; user chooses from a list
- Asset needs verification or research (yes/no)
- Rim elevation
- Invert elevation of line leading into the manhole
- Invert elevation of line leading out of the manhole
- Depth

- Quarter section number (location)
- City ID number
- Date the feature was updated (data or geometry)
- Lifecycle Status
- GPS (yes/no)
- GPS Editor
- GPS Date
- Record Drawing number
- Comments
- Confined Space entry permit requirements; user chooses from a list
- Safety notes for maintenance

Service Laterals (6 fields)

Major fields:

- Distance from upstream manhole
- Date the feature was edited (data or geometry)
- Lifecycle status; user chooses from a list
- Material; user chooses from a list
- Diameter; user chooses from a list
- Comments

Fittings (7 fields)

Major fields:

- Fitting type; user chooses from a list
- Comments
- Date the feature was edited (data or geometry)
- City ID number

Storm Sewer GIS Features

Feature Classes:

Mainlines, Structures, Fittings, Laterals, Culverts, and Ditch lines

Common fields seen throughout the Storm Sewer feature classes:

- Owner; user chooses from a list
- Jurisdiction responsibility for maintenance; user chooses from a list
- Governing Jurisdiction's unique identification number

Mainlines (23 fields)

Major fields:

- Type; user chooses from a list
- Lifecycle Status
- Material; user chooses from a list
- Record Drawing number
- Diameter; user chooses from a list
- Distance between manholes
- Invert elevation at start
- Invert elevation at end
- Slope of the line
- Rehabilitation (yes/no)
- Easement flag (yes/no)
- Comments
- Cleaning Basin; user chooses from a list
- Date cleaned
- Feature edit date (data or geometry)
- Operation month
- Operation year
- TV Inspection Date

Structures (28 fields)

Major fields:

- Type; user chooses from a list
- Description; user chooses from a list
- Size; user chooses from a list
- Rim elevation
- Invert elevation of line leading into the structure
- Invert elevation of line leading out of the structure
- Quarter section number (location)
- City ID number
- Asset needs verification or research (yes/no)
- Comments

- Date the feature was updated (data or geometry)
- Sump flag (yes/no)
- GPS (yes/no)
- GPS Editor
- GPS Date
- Structure is flow-through (yes/no)
- Water Quality capable (yes/no)
- Record Drawing number
- Sump depth, if applicable
- Total Depth
- Confined Space entry permit requirements; user chooses from a list
- Safety notes for maintenance

Fittings (7 fields)

Major fields:

- Fitting type; user chooses from a list
- Comments
- Feature edit date, data or geometry
- City ID number

Laterals (6 fields)

Major fields:

- Lateral type; user chooses from a list
- Distance from upstream structure
- Comments
- Feature edit date, data or geometry
- Diameter; user chooses from a list
- Material; user chooses from a list

Culverts (12 fields)

Major fields:

- Type; user chooses from a list
- Description; user chooses from a list
- Diameter; user chooses from a list
- Length
- Material; user chooses from a list
- Comments
- Feature edit date, data or geometry

Ditch lines (9 fields)

Major fields:

- Elevation at start
- Elevation at end

- Comments
- Feature edit date, data or geometry

Water Quality GIS Features

Feature Classes:

Service Boundary, Facility Outline, Facility Point

Common fields seen throughout the Water Quality feature classes:

- Record Drawing Number
- Owner; user chooses from a list
- Jurisdiction responsibility for maintenance; user chooses from a list
- Governing Jurisdiction's unique identification number

APPENDIX E

System Integration Requirements

Asset Management, Work Order, and Maintenance Management System (Asset/MMS) RFP

SYSTEM INTERFACES

- A. MUNIS (ERP) Interface
 - 1) MUNIS to Asset/MMS –Resource Costing Interface
 - 2) MUNIS to Asset/MMS –Receiving/Inventory (Fixed Assets) Interface
- B. Wonderware (SCADA) Interface
- C. PipeTech (CCTV) Interface
- D. Time and Attendance interface
 - 1) Asset/MMS to MS Excel Timesheets
 - 2) Asset/MMS to Time and Attendance -Time, Rates, Cost Centers

A. MUNIS (ERP) Interface

The City utilizes Tyler Technologies' MUNIS as its Financial Management/ERP System. We are currently on MUNIS 7.4 with a Microsoft SQL 2005 Enterprise Edition backend database. The following link provides further details about our ERP System and Tyler.

Company: <http://www.tyler-munis.com/>

It is highly desirable for the selected Asset/MMS system to have the ability to track total costing for Work Order Management by providing the following two primary interfaces with MUNIS:

- 1) MUNIS to Asset/MMS Resource Costing, and
- 2) MUNIS to Asset/MMS Receiving/Inventory (Fixed Assets)

1) MUNIS to Asset/MMS Interface - Resource Costing

MUNIS provides the employee salary, benefits, and pay types (various overtime rates). Pay Types must be associated with specific tasks on Work Orders within the selected Asset/MMS. System must also be able to track Organization, Object, Project and/or Allocation codes for each Pay Type.

These accounting codes must be tracked in increments of 15 minutes for each Work Order/Task of the selected Asset/MMS. In addition, the Asset/MMS must have the ability to track multiple Accounting Codes for a single Work Order. For example, when a specific task overlaps into an overtime rate of pay, a new Pay Type would be applied.

The following tables represent data elements to be captured from MUNIS into an example Work Order. Everything highlighted in yellow must be derived from MUNIS.

101 Work Order Example: (Main Table)

Task ID	Activity	Task Description	Total Staff	Hours	Total Cost
1	1151	Clean Catch Basin	2	5	\$81.13
2	1154	Mosquito Treat	1	1	\$10.75
Task ID	Resource	Resource Description	Rate	Hours	Cost
1	99812 ¹	Vacuum Truck	\$32.75	2.5	\$81.88
2	99823	Spray Truck	\$21.50	1	\$21.50
				Total	\$195.26

¹. References Org, Object, and Project Codes from lookup table.

W/O	Task ID	Activity	Person ¹	Account Number ²	Allocation	Pay Type	Hours	Rate for Person and Pay Type	Total
101	1	1151	John Doe	20052403500012300		100	2	\$18.75	\$37.50
101	1	1151	John Doe	20052403500012300		200 (Base*1.82)	0.5	\$28.13	\$14.06
								Sub-Total	\$51.56
101	1	1151	Jane Doe	20052403500012300		150	2	\$10.75	\$21.50
101	1	1151	Jane Doe	20052403500012300		200	0.5	\$16.13	\$8.06
								Sub-Total	\$29.56
						Total Task 1		Total Task	\$81.13
101	2	1154	Bob Smith		2005	150	1	\$10.75	\$10.75
								Sub-Total	\$10.75
								Total Task	\$10.75
								Total WO	\$91.88

¹. Includes Employee Number, Employee Last Name, Employee First Name, Location, Position, Position Description, Risk, and Job Classification Codes

². Includes Org, Object, and Project Codes

The proposed MUNIS interface solution and the proposed Asset/MMS solution must be able to accept and handle the following data:

Items to be Received in Asset/MMS from MUNIS

- Employee Number
- Employee Last Name
- Employee First Name
- Position -Job Title
- Position Description
- Risk Code -Job Classification
- Location -*Often Division Code*
- Location Description
- Organization -*Department*
- Organization Description
- Object -*Pay Type Category*
- Object Description
- Project
- Project Description
- Allocation –Payroll account type splits
- Pay Type -*Pay Types/Codes*
- Pay Type Description
- Hourly Rate

2) MUNIS to Asset/MMS –Receiving (assets) to ASSET/MMS

A portion of the City's Purchasing process is conducted through MUNIS. For items over \$1,000 the City's policy is to create a Purchase Order through MUNIS. It is highly desirable to use some of these "fixed" assets as resources within the proposed Asset/MMS solution. The Asset/MMS solution must have the ability to assign hourly rates and overhead rates for each fixed asset used as a resource. The Vacuum and Spray Trucks in the table above is a good example of these asset types.

The proposed Asset/MMS solution must have the ability to import and/or link directly from the MUNIS SQL Database to populate assets by Organization and Object Codes (described above). These items must be indicated as inventoried items within the selected Asset/MMS.

B. Wonderware (SCADA) Interface

The City's and Joint Water Commission's Water Treatment Plant utilizes the Wonderware SCADA system for water treatment and distribution systems. Vital elements such as equipment status and runtime data are collected in an industrial SQL server. Wonderware can display GIS as well as asset management information on the Human Machine Interface. This allows operators to utilize a known interface for receiving and reporting maintenance data, reducing training requirements for the end user.

An interface with this system and the proposed Asset/MMS system will allow the City to extract equipment data for scheduling preventive and corrective maintenance. There exist standards for information exchange with Wonderware and other SCADA systems such as MIMOSA (<http://www.mimosa.org>).

Wonderware also offers toolkits that allow developers to exchange data with its systems. Information can be found at <http://global.wonderware.com/EN/Pages/WonderwareToolkits.aspx>.

The Wonderware interface solution is expected to come in one of the following formats:

1. Existing native data exchange with Wonderware (Historian or InTouch), or support of data exchange through an open protocol such as MIMOSA,
2. Vendor has an open API or SDK that allows customer to develop their own data exchange methodology, or
3. Vendor can develop active data interchange with Wonderware for a specified bid cost:
 - a. Exchange data between Wonderware Historian or InTouch and Vendor database on Delta or Cyclic data updates.
 - b. Unlimited number of tags can be exchanged and should be customer configurable.
 - c. Data exchange should be native and not require manipulation by customer such as exporting or importing XML or CSV files from Wonderware.

C. PipeTech (CCTV) Interface

The City's Public Works Department utilizes Peninsular Technologies' PipeTech product as its CCTV solution to video storm and sanitary lines.

Company: <http://www.pipetech.tv/>

The GIS layers exist for these assets; however, the link between the GIS layers and PipeTech videos (stored on a file server) does not exist. The proposed PipeTech interface solution should enable access to PipeTech video from the selected Asset/MMS system as well as enable data maintenance updates to assets in the Asset/MMS proposed solution from PipeTech in the field. Proposed solutions can be designed around a total GIS solution and/or the proposed Asset/MMS solution directly.

D. Time and Attendance Interface

Currently, the City does not have a Time and Attendance System. However, we are in the early planning phase for procuring a system and it's anticipated that the system will begin implementation by July 2010. We have two phases to the development of this interface:

- 1) Asset/MMS to Excel timesheets (The Asset/MMS Project must have the ability to export into MS Excel for individual time sheets), and
- 2) Asset/MMS to Time and Attendance -Time, Rates, Account Number (Org, Object, and Project). This is a possible future interface to be developed for a yet to be selected Time and Attendance System.

1) ASSET/MMS to Time and Attendance Interface –Timesheets

At the onset of the Asset/MMS Project, the selected Asset/MMS must have the ability to produce MS Excel Spreadsheet with the following properties:

- Employee Number (From MUNIS)
- Employee Name (First and Last)
- Organization (From MUNIS)
- Object (From MUNIS)
- Project (From MUNIS)
- Allocation (From MUNIS)
- Pay Type (From MUNIS)
- Date
- Hours

For example, the following spreadsheet indicates what this could look like:

EMPLOYEE NAME		John Smith							MONTH		JUNE 2008						
WORK WEEK		Starts Friday at noon and ends Friday at noon															
DATE		PR	PREV	1		7											
TOTALS		MO	2	3	4	5	6	6	8	9	10	11	12	13			
PROJECT NUMBER	WORK TYPE/COST CENTER/PROJECT#			SUN MON	TUES	WED	THUR	FRI AM	WEEK TOTALS	FRI PM	SAT SUN	MON	TUES	WED	THUR	FRI AM	WEEK TOTALS
HOME		44.00		5.00	2.00		3.00	4.00	14.00	4.00		4.00	8.00			CDO	16.00
1335	SE MAPLE & 21st	67.00		4.00	2.00				6.00			2.00		4.00			6.00
1315	Dairy Creek Park Pipe	13.00			2.00	8.00	3.00		13.00								
1357	Overlay Project	15.00			3.00	1.00	2.00		6.00			3.00	1.00	5.00			9.00
1720	E.Main & 9th St Sewer	1.00					1.00		1.00								
1740	Witch Hazel Phase II	16.00															
1420	SE Frances St - 73rd Ave	4.00															

2) ASSET/MMS to Time and Attendance Interface –Time, Rate, Cost Centers

Once a Time and Attendance application is selected, installed, and setup; the Asset/MMS must be integrated. The base information that needs to be transferred to a future system includes, but not limited to; the following:

Items to Transfer to Time and Attendance System

- Employee Number
- Position
- Risk Code
- Location
- Organization
- Object
- Project
- Allocation
- Pay Type

The following table represents data elements to be transported to a future Time and Attendance System. .

Work Order Example (Sub-Table)									
W/O	Task ID	Activity	Person ¹	Account Number ²	Allocation	Pay Type	Hours	Rate for Person and Pay Type	Total
101	1	1151	John Doe	20052403500012300		100	2	\$18.75	\$37.50
101	1	1151	John Doe	20052403500012300		200 (Base*1.82)	0.5	\$28.13	\$14.06
								Sub-Total	\$51.56
101	1	1151	Jane Doe	20052403500012300		150	2	\$10.75	\$21.50
101	1	1151	Jane Doe	20052403500012300		200	0.5	\$16.13	\$8.06
								Sub-Total	\$29.56
						Total Task 1		Total Task	\$81.13
101	2	1154	Bob Smith		2005	150	1	\$10.75	\$10.75
								Sub-Total	\$10.75
								Total Task	\$10.75
								Total WO	\$91.88

¹ Includes Employee Number, Employee Last Name, Employee First Name, Location, Position, Position Description, Risk, and Job Classification Codes

² Includes Org, Object, and Project Codes