



REQUEST FOR INFORMATION

RFI – PW 09-10-1

CONSTRUCTION DOCUMENT MANAGEMENT SOLUTIONS

**Responses Due on January 29, 2010
at 2:00 p.m. Pacific Time**

1. BACKGROUND

1.1 Vision and Mission

The vision of the Public Works Department at the City of San José is *"to be the national leader in building a smart and sustainable community"*. The vision will be accomplished by focusing on the mission – *"to build the best public facilities through collaboration and innovation"*.

1.2 Current Data and Document Management

Public Works has three primary areas of operation – Capital Projects, Private Development Projects and General Business. Documents related to Private Development Projects are captured in a large, multi-department database application on a FileNet platform. The Integrated Development Tracking System stores development information and is seen as a preferred alternative for automating permitting documents. IDTS enhancements will not be the subject of this RFI.

Public Works has two other databases with project and general function information. A small database called cFiles was developed in-house that contains record drawings of improvement plans for Capital Projects and early Development Projects as well as historical survey maps and subdivision maps. Currently the Capital Project Management System (CPMS) is an in-house developed application that captures information about all Public Works projects done for the citywide Capital Improvement Program (CIP). This database is based on an oracle platform. It is the desire of the City to examine how best to leverage existing systems as well as looking at new products and techniques:

General Business functions include Communication, Budget, Fiscal Operations, Legal Coordination, Human Resources, Staff Development and Labor Compliance. Examples of document types include City Council and City Manager memoranda, contracts and agreements, billing invoices and payment letters.

Inactive construction files, paper and alternate media such as CDs and videotape, are stored in the City's Records Center which has a recently upgraded database that tracks items stored, transactions and status of inactive files.

1.3 Commitment to Document and Process Improvement

In November of 2008, the City of San José's Information Technology Department hired a consultant and in-house manager to begin the process of analysis and

acquisition of an Enterprise Content Management System (ECM). Anticipating the value-added benefits available from full participation in the preliminary document, process and system inventory, Public Works spent considerable time training and supporting staff through this effort so that the data could be used for department process improvements as well as contributing to citywide data. Staff compiled and submitted data and met with ECM staff to provide business-specific description of their results. Recommendations of the ECM consultants are referenced in item 8.1.

Public Works is committed to process improvements for creation, storing, sharing, tracking and disposition of documents – both paper and electronic. Two of the many strategies created to achieve the mission are:

- Best utilize the talents of our skilled staff, and
- Maximize our ability to deliver exceptional customer service by managing information effectively and efficiently.

This Request for Information is one initiative of the Document Process Improvement Team with these goals in mind.

2. PURPOSE

The objective of this Request for Information (RFI) is to ascertain what solutions – i.e. software, organizational restructuring, etc. - and associated costs exist in the marketplace to provide construction document management for the Department of Public Works at the City of San José (City). Further, the purpose of this RFI is to gather information on existing Construction Document Management software or strategies with a focus on paper and paper to electronic document evolution. The information may be used as follows:

- 2.1** To determine which applications or strategies can best provide construction document management throughout its lifecycle from creation to archiving or purging.
- 2.2** To develop preliminary budgetary justification including rough estimates for further analysis on procurement of a construction document management application or alternative solution(s).
- 2.3** To assist in the development of specifications that may be used in a formal competitive procurement document, such as a Request for Proposal, if that solution is selected.

3. CONTACT INFORMATION

Please submit questions via BidSync, the City's Bid Management vendor at www.bidsync.com. As a City of San José customer, you do not have to pay a fee to use the BidSync system. You must register with BidSync but you can contact them to have the fee waived.

Submit final documents by email, courier or personal delivery to:

City of San José Department of Public Works
Attn: Gay Gale, Program Manager
200 E. Santa Clara St. 5th Fl.
San Jose, CA 95113-1905

Telephone: (408) 793-4135
Email: gay.gale@sanjoseca.gov

4. RFI TIMELINE

RFI Release Date	January 12, 2010
Deadline for supplier questions	January 19, 2010
City's Response to Questions published	January 22, 2010
RFI Responses Due	2:00 pm PT on January 29, 2010
Oral Presentations (if desired)	TBD

5. GENERAL INFORMATION

5.1 This RFI is issued solely for information and planning purposes and does not constitute a solicitation. Responses to this notice are not offers and cannot be accepted by the City to form a binding contract.

5.2 This RFI process will **not** result in the recommendation of or selection of any supplier, or the issuance of a purchase order or agreement of any type.

5.3 Confidential or proprietary information should not be included in your response.

5.4 Responders are solely responsible for any and all expenses that may be associated with responding to this RFI.

6. RESPONSE INFORMATION

Please provide the following information with your response:

6.1 Company Background

6.1.1 A brief description of your company, your products, services and other information you deem relevant (e.g. number of years in business, age of products).

6.1.2 Vendor contact information.

6.1.3 Information about customers currently using the software or solution being proposed including but not limited to organization's name, location, size, customer contact name, phone and email.

6.2 Product Functionality

6.2.1 Product literature describing how your product/solution meets the desire functionality outlined in Sections 7 and 8 of this RFI.

6.2.2 Optional: Additional product information that might be of interest given the functionality outlined in Sections 7 and 8 of the RFI. This information can be provided via specific website pages, CD or printed material.

6.3 Cost Estimates

Provide pricing information for the City to use for budgeting purposes. Please separate costs into non-recurring and annual costs for such items as licensing, hosting, initial setup, data migration, training, license maintenance, support and any other relevant categories. Please identify cost drivers and cost tradeoffs as appropriate.

6.4 Implementation Approach and Sample Schedule

6.4.1 Provide your strategic approach including methodology where appropriate for the following activities:

- Business Assessment
- Software Licensing or hosting
- Migration and Configuration/customization and setup
- Staff training
- Ongoing Maintenance and Support
- Any other categories that you think relevant

6.4.2 Provide a sample implementation schedule from typical lead-time to notice to proceed and including time estimates for any of the functions described in 6.4.1 above.

6.5 System Requirements and Options

6.5.1 Describe the minimum hardware requirements and operating platform options for server and desktop operations.

6.5.2 Describe any additional hardware and software required to implement the solution and/or product you propose.

6.6 Sample Documents

Provide a sample Software License Agreement and a sample Software Maintenance Agreement.

6.7 Any other materials, suggestion or discussion you deem appropriate.

7. MINIMUM CRITERIA

7.1 General

7.1.1 Web-based

7.1.2 User-friendly and intuitive

7.1.3 Strong technical support

7.1.4 Training program for new users and new features

7.1.5 ADA accessible

7.1.6 Potentially scalable to other departments or City

7.2 Functions

7.2.1 Ability to link and import documents and other media

7.2.2 Streamlined data entry

7.2.3 Security features allowing multiple level of access

8. ADDITIONAL INFORMATION

8.1 For Department of Public Works Enterprise Content Management recommendations see "PW ECM Recommendations.pdf".