



PURCHASING DEPARTMENT
33 East Broadway Avenue,
Meridian, ID 83642
Phone: (208) 489-0416
Fax: (208) 887-4813

REQUEST FOR PROPOSALS

RFP NO. PW-09-10074

REQUEST FOR PROPOSAL:

PROFESSIONAL SERVICES **HANSEN 8 IMPLEMENTATION**

PROPOSALS MUST BE RECEIVED PRIOR TO
4:00 P.M. Wednesday, June 17, 2009

DELIVER TO: CITY OF MERIDIAN, PURCHASING DEPARTMENT
33 EAST BROADWAY AVENUE
MERIDIAN, ID 83642

Pre-Proposal Conference
MANDATORY

[☐] YES

[☒] NO

Tuesday, June 2, 2009 10:00 am
Teleconference – see notes on
page 3 for instructions

Prepared by: KATHY WANNER

NAME AND ADDRESS OF VENDOR SUBMITTING PROPOSAL

NAME: _____ ADDRESS: _____

REQUEST FOR PROPOSALS

**CITY OF MERIDIAN
Meridian, Idaho 83642**

RFP # PW-09-10074

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PART I

NOTICE CALLING FOR PROPOSALS

PURPOSE

The City of Meridian, Idaho is seeking proposals from firms to provide professional services to provide training and technical consulting for a successful implementation of Hansen 8 Asset Management Software. The City of Meridian's goals in using contracted professional services for this work are to develop in-house knowledge to configure and support the software, to reduce risk, and to seek recommendations based on industry standards and best practices used by other government agencies to implement asset management programs.

PROJECT OVERVIEW

A new installation of the newest version of the Hansen software, Hansen 8 will be utilized for the asset management of sewer, plant and water assets. Implementation will involve asset inventory for plant and sewer assets, PM (preventative maintenance) creation, work order management, workflow creation, sewer inspections, Neztex interface to CUES TV van. Existing sewer asset data is stored in the City of Meridian GIS database and will be populated in the Hansen 8 software using the Hansen GeoAdministrator tool.

The City of Meridian has partnered with the City of Boise to create an implementation team that has extensive knowledge of Hansen 7, procedural documentation, database naming conventions, Crystal Reports, and end user training. Based on this knowledge and skill set, the implementation team is planning on receiving Hansen 8 specific training and performing the configuration of the software in-house with assistance as needed from the successful respondent of this RFP.

PRE- PROPOSAL INFORMATION

A non-mandatory pre-proposal conference is scheduled for Tuesday, June 2, 2009 at 10:00 a.m., Mountain Time. This is set up as a teleconference. To take part in the teleconference, please call (208)489-0416 or e-mail Kathy Wanner at kwanner@meridiancity.org by May 29, 2009 at 4:00 pm

PRESENTATIONS

Those respondents which are determined to be best qualified to undertake the services required under this Request for Proposals may be invited to make a presentation to the City. Further information may be provided to the prospective respondents after the initial selection.

SUBMITTAL REQUIREMENTS

One (1) original (clearly labeled "original") and eight (8) copies of the respondents sealed proposal will be received by the City until Wednesday, June 17, 2009 4:00 p.m., MT at the office of the Purchasing Agent, City of Meridian, 33 East Broadway Avenue, Meridian, Idaho 83642.

The Proposal must contain, but is not limited to the following information:

1. Completed proposal form submitted on PART III-A PROPOSAL FORM.
2. A summary of the respondents experience with projects similar to the types of work stated in this Request for Proposals, submitted on PART III-B, RESPONDENT'S EXPERIENCE STATEMENT.
3. Total proposed cost of respondent's services (**IN A SEPARATE SEALED ENVELOPE**) in response to and in compliance of this Request for Proposals. Proposal costs shall be detailed and are to include all labor, material, travel, related expenses, equipment, etc. Pricing response must be completed on Part III Attachment C Pricing Schedule attached.
4. Any additional information which the respondent deems appropriate.

PROPOSAL FORMAT:

To assist in the evaluation process, statements should contain the following information. Emphasis will be placed on qualifications of persons that will actually perform the work, including sub-consultants. Proposals are limited to 30 one-sided pages excluding standard corporate brochures and personnel resumes. In a separate sealed envelope, also provide the cost of your professional services. Proposal content shall include the following in the completed forms provided:

- A. **Letter of Introduction** – Introduction of firm, location, current staff mix and contact person who would be responsible for the project.
- B. **Basic Qualifications** – General background and experience of firm (Vendor Questionnaire & Vendor Information).
- C. **Project Approach** – A brief narrative of your understanding of this project (Statement of Work, Training and Documentation).
- D. **Key Personnel** – List the team members expected to perform the work, with a resume of experience (Vendor Project Team Information).
- E. **Portfolio of Similar Work** – A list of similar projects, listing the owners, contact person, address and phone numbers must be included (Vendor References).

CITY'S REPRESENTATIVES

Purchasing Representative

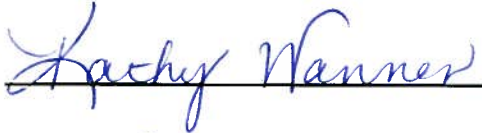
Kathy Wanner, Purchasing Assistant
33 East Broadway
Meridian, ID 83642
(208) 489-0416
Fax (208) 887-4813
kwanner@meridiancity.org

Technical Representative

Kathi Buttars
3401 N Ten Mile Rd
Meridian, ID 83642

Any and all explanations desired by a respondent regarding the meaning or interpretation of this Request for Proposals or any part thereof must be requested in writing and directed to the person named as the Purchasing Representative and in accordance with section 1 "EXPLANATIONS TO RESPONDENTS". Violation(s) of this process may be caused for rejection of the proposal.

CITY OF MERIDIAN



Dated: 

PART II

INSTRUCTIONS TO RESPONDENTS

1. EXPLANATIONS TO RESPONDENTS

There are thirty-six (36) total pages in this Request for Proposals. It is the respondent's responsibility to ensure that all pages are included. If any pages are missing, immediately request a copy of the missing page (s) by e-mailing your request to Kathy Wanner, Purchasing Assistant at kwanner@meridiancity.org , RFP # PW-09-10074.

Any explanation desired by a respondent regarding the meaning or interpretation of the Request for Proposals, or any part thereof, must be requested in writing (via fax or e-mail) no later than 3 days prior to the due date and time to allow sufficient time for a reply to reach respondent before the submission of their proposal. Any Request of a technical nature should be sent to BOTH the Purchasing Representative and Technical Representative. Any interpretation made will be in the form of an addendum to the Request for Proposals, issued by the Purchasing Agent, and will be furnished to all prospective respondents of record. Oral explanations or instructions given before proposal opening will not be binding.

2. CONDITIONS AFFECTING THE WORK

Before submitting a proposal, each respondent must (1) examine the Request for Proposals documents thoroughly, (2) familiarize himself/herself with Federal, State and Local laws, ordinances, rules and regulations that may, in any manner, affect cost, progress or performance of the work; and (3) study and carefully correlate respondent's observations with the Request for Proposal's. Failure to do so will not relieve respondent from responsibility for estimating properly the difficulty or cost of successfully performing the work. The City will assume no responsibility for any understanding or representations concerning conditions made by any of it's officers or agents prior to the execution of the contract, unless included in the Request for Proposal's, or any addendum.

3. SUBMISSION OF PROPOSALS

Interested firms shall submit one (1) original and eight (8) copies of their response in Accordance with this Request for Proposals and must be sealed and addressed as directed below. Failure to do so may result in a premature opening of, or a failure to open, such proposals. Such premature or late opening, or failure to open, may result in disqualification of the proposal. The outside of the submittal envelope/package must bear the notation:

**RFP # PW-09-10074
PROFESSIONAL SERVICES HANSEN 8 IMPLEMENTATION
JUNE 17, 2009 4:00 P.M.**

The envelope must be addressed and delivered to: City of Meridian, Purchasing Department, 33 East Broadway Avenue, Meridian, Idaho 83642.

3a. PRICING SCHEDULE

The Pricing schedule shall be included in a separate sealed envelope. The envelope containing the Pricing Schedule shall be addressed as follows:

**Pricing Schedule
RFP PW-09-10074
Professional Services Hansen 8 Implementation
June 17, 2009 4:00 p.m.**

4. LATE PROPOSALS AND MODIFICATIONS

Proposals and modifications thereof received after the exact time of closing of proposals which is **4:00 p.m. June 17, 2009** will not be considered.

5. WITHDRAWAL OF PROPOSALS

Unless otherwise specified, proposals may be withdrawn by written request, received from respondent prior to the time set for closing of proposals.

6. ADDITIONAL PROPOSAL REQUIREMENTS

To receive consideration, the proposal must comply with the following additional requirements:

- a. The proposal and all other documents or material submitted will be deemed to constitute part of the proposal.
- b. Proposals must be valid for a period of sixty (60) calendar days from the date of opening.

7. INTENT OF THE CITY

The objective of this Request for Proposals is to provide sufficient information to enable qualified respondents to submit written proposals. This Request for Proposals is not a contractual offer or commitment to purchase services. Contents of this Request for Proposals and respondent's proposal will be used for establishment of final contractual obligation. It is to be understood that this Request for Proposals and the respondent's proposal may be attached or included by reference in an agreement between the City and successful respondent.

8. BASIS FOR SELECTION AND AWARD

This Request for Proposals will be evaluated utilizing the percentages and criteria listed below.

Primary factors affecting evaluation of RFP include:

- The quality of the Respondent's approach and work plan.
- The quality and experience of staff proposed to be used on this project.
- The relevance of prior and related experience.
- The Compatibility of timeline and commitments to the needs of the City of Meridian Implementation Team.

RFP responses will be evaluated by a team of evaluators. The evaluation team consists of the Utilities Operations Manager, two (2) Implementation Team Members, IT Manager, and two (2) Plant Co-Managers.

Proposals will be evaluated based on the answers provided in Part III of this RFP, with each of the items within those various sections having a specific weight assigned to them, as detailed in the chart below.

Description	Points
Vendor Information	10
Vendor Project Team Information	15
Vendor References	10
Statement of Work	35
Training Documentation	20
Pricing/Cost	10
	100

Evaluators will review responses to determine how well the respondent has addressed the selection criteria. Each item will be given a point value that indicates its importance to the City of Meridian. The evaluators may award all the points, none of the points, or some of the points, depending upon how the evaluator rates the response. Evaluator ratings will be averaged to obtain the average points awarded for each item for each

respondent. The points will then be added to obtain the total score for each responsible respondent.

The City reserves the right to reject any or all proposals, to make an award on the basis of suitability to purpose or superior quality.

After the City has identified the highest ranked proposal, the City shall have the right to negotiate with the respondent over the final terms and conditions of the contract. These negotiations may include bargaining. The primary objective of the negotiations is to maximize the City's ability to obtain best value, based on the requirement and the evaluation factors set forth in the Request for Proposals. If an agreement cannot be reached, the negotiation will be terminated and similar negotiations will occur with the second ranked firm.

9. REQUIRED INSURANCE

Insurance requirements are listed in Section 5 of the attached sample agreement.

10. BONDS

The respondent to whom the contract is awarded shall furnish to the City a Performance Bond and Payment Bond if the contract price is \$25,000 or more, executed by a corporate surety acceptable to the City and authorized to do business in the State of Idaho. The bonds shall be equal to One Hundred Percent (100%) of the contract price individually. The entire cost of the bonds shall be borne by the successful respondent.

11. CONTRACT COMPLETION DATE

The successful respondent shall be required to (a) sign a City contract (b) commence work under the contract within seven (7) calendar days after the date the successful respondent receives the Notice of Award, (c) perform the work diligently, and (d) complete the work by the completion date negotiated.

12. EXPECTED PROJECT SCHEDULE

Expected Hansen 8 Implementation Timeline	
Installation and Training services provided by Infor	July 2009
Overview Training for Core Implementation Team	Mid July 2009
Initial Advanced Training for Core Implementation Team	August 2009
Configuration and Documentation	September 2009
Testing, Report Writing	October 2009
Additional Advanced Configuration Training	November 2009

GENERAL TERMS AND CONDITIONS

Mistakes must be corrected and the correction inserted; correction must be initialed in ink by the person signing the Proposal.

Alternate Proposals will not be considered unless otherwise stipulated.

If required, before award or execution of the contract by the City, the Contractor shall file with the City a surety bond satisfactory to the City in the amounts and for the purpose noted. Bonds shall be duly executed by a responsible corporate surety, authorized to issue such bonds in Idaho and secured thorough an authorized agent with an office in Idaho. Contractor shall pay all bond premiums, costs and incidentals.

The City reserves the right to waive any informalities or minor irregularities in connection with the Proposals received.

All provisions of the City code are applicable to any Proposal submitted or contract awarded pursuant thereto.

Within thirty (30) days after the Proposal opening, a contract may be awarded by the City to highest ranked Proposer, subject to the right of the City to reject all Proposals, as it may deem proper in its absolute discretion. The time for awarding a contract may be extended at the sole discretion of the City, if required, to evaluate Proposals or for such other purposes as the City may determine, unless the Proposer objects to such extension in writing with his Proposal.

The City of Meridian does not discriminate on the basis of race, religion, sex, national origin, marital status, age, physical handicap, ownership by women or minorities or sexual orientation.

ADDITIONAL TERMS AND CONDITIONS

EXAMINATION OF CONTRACT DOCUMENTS

The Proposer's shall carefully examine the specifications, and satisfy themselves as to their sufficiency, and shall not at any time after submission of the Proposal, dispute such specifications and the directions explaining or interpreting them.

PURCHASE AGREEMENT DOCUMENTS

A copy of the Notice Inviting Proposals, General Conditions and Instructions to Proposal's, Special Conditions, Additional Terms and Conditions, Specifications, Plans and / or Drawings, Proposal's Submittal, and any other related documents will remain on file in the office of the City Purchasing Agent. It is understood that these documents will form the basis of the purchase agreement upon award of the contract. All materials or services supplied by the Contractor shall be in conformance with all the specifications contained herein and shall be in compliance with any applicable Local, State, and Federal Laws and regulations.

PUBLIC AGENCY CLAUSE

Contract prices, terms, and conditions may be extended to other Public Agencies as defined in Section #67-2327 of the Idaho Code.

PART III
PROPOSAL DOCUMENTS
A - PROPOSAL FORM

In response to the Request for Proposals, the undersigned respondent hereby proposes to furnish labor, material, travel, professional services, permits, supervision, equipment and equipment rental and all related expenses, and to perform all work necessary and required to complete the following project in strict accordance with the terms of this Request for Proposals and the final contract for the prices specified by the respondent for:

RFP # PW-09-10074

PROFESSIONAL SERVICES FOR HANSEN 8 IMPLEMENTATION

Respondent certifies that he/she has examined and is fully familiar with all of the provision of the Request for proposals and any addendum thereto; that he/she is submitting a proposal in strict accordance with the Instructions to Respondents; and that he/she has carefully reviewed the accuracy of all attachments to this proposal.

Respondent certifies that he/she has examined the proposal documents thoroughly, studied and carefully correlated respondent's observations with the proposal documents, and all other matters which can in any way affect the work or the cost thereof.

Respondent agrees that this proposal constitutes a firm offer to the City which cannot be withdrawn by the respondent for sixty (60) calendar days from the date of actual opening of proposals. If awarded the contract, respondent agrees to execute and deliver to the City within seven (7) calendar days after receipt of City's Conditional Notice of Award, the applicable Contract form, insurance certificates and bonds (if required).

Attached is the Respondent's Experience Statement (Part III, B) which has been completed by respondent and made a part of this proposal.

Respondent also acknowledges receipt of the following addendum to the Request for Proposals which addendum have been considered by respondent in submitting this proposal (if none, state "NONE"):

Addendum No. 1 _____

Addendum No. 2 _____

Submitted by,

RESPONDENT'S BUSINESS NAME (type or print)

By: _____
(signature in ink)

Date: _____

Name: _____

Title: _____

RESPONDENT'S BUSINESS ADDRESS/PHONE/FAX/E-MAIL

(address)

(address)

(address)

(phone number)

(fax number)

(email address)

(Business Website)

Note: If respondent is a corporation, give State of incorporation; if a partnership or joint venture, give full names of all partners or joint ventures.

DECLARATION UNDER PENALTY OF PERJURY

The undersigned declares: that he/she holds the position indicating below as a corporate officer or the owner or a partner in the business entity submitting this Proposal; that the undersigned is informed of all relevant facts surrounding the preparation and submission of this Proposal, that the undersigned knows and represents and warrants to the City of Meridian that this Proposal is prepared and submitted without collusion with any other person, business entity, or corporation with any interest in this Proposal.

I declare under penalty of perjury that the foregoing is true and correct.

PROFESSIONAL SERVICES HANSEN 8 IMPLEMENTATION

REQUEST FOR PROPOSAL NO. PW-09-10074

CONTRACTOR/FIRM: _____

BY: _____

TITLE: _____

ADDRESS: _____

DATE: _____

PART III

PROPOSAL DOCUMENTS B-RESPONDENT'S EXPERIENCE STATEMENT

The respondent submits as a part of its proposal, the following information as to its experience and qualifications:

- a. The respondent has been engaged in the Hansen 8 Asset Management Implementation business under its present business name for _____ years.
- b. Experience in work of a nature similar in type and magnitude to that set forth in the request for proposal extends over a period of _____ years.
- c. The respondent has satisfactorily completed all contracts awarded to it, except as follows: (name any and all exceptions and reasons therefore).

- d. List all work completed within the last ten (10) years of similar type and magnitude as set forth in this Request for Proposals. Please include a sheet with all contact information and details of the project on a separate sheet.

OWNER	YEAR COMPLETED	TYPE OF WORK	CONTRACT AMOUNT

I certify that the above information is true and correct to the best of my knowledge.

Signed this _____ day of _____, _____ at _____
(date) (month) (year) (city, state)

NAME OF RESPONDENT: _____

(title)

VENDOR QUESTIONNAIRE (Attach additional pages as necessary)**Vendor Information**

	Vendor Information	Response
1	What is your total number of employees?	
2	Where is the project team that would be assigned to this project located geographically?	
3	What is your company's specialty or primary service?	
4	How long has your company been in business?	
5	Describe the extent of your company's experience in providing Hansen 8 implementation services.	
6	How many new implementations of Hansen 8 has your company been involved with in the last 36 months that involved sewer or plant assets?	
7	How many conversions to Hansen 8 has your company been involved with in the last 36 months that involved sewer or plant assets?	
8	Are you a Certified Hansen Consulting Partner or do you have any existing business relationship with Infor? Please describe any business relationship and how it would be beneficial in this scope of work.	
9	What makes your service different/better than your competitors? Discuss your approach:	
10	Describe any relevant experience of your company as it relates to the scope of services contemplated by the RFP.	

Vendor Project Team Information (Attach additional pages as necessary)

1	Identify the Project Leader(s) to be committed to this project. Once identified, the project leader(s) cannot be changed without the approval of the City of Meridian.	
2	Identify the project members to be committed to this project.	
3	Describe in detail each person's background, including their educational and professional background, their professional certifications, and their knowledge of and experience in working with government operations and administrative services.	
4	Provide a staffing plan for work under this RFP, and indicate the roles and responsibilities of each assigned individual.	

Vendor References

Please provide four names and contact phone numbers of sites that have employed your professional services in this capacity, based on the items below, if possible:

- Services were related to Hansen 8 software
- Services were provided by project manager also identified for this project
- Reference is local government municipality
- Reference has had Hansen 8 running in their production environment for more than 6 months

Reference 1

Organization Name:	
Contact Name:	
Contact Title/Role:	
Contact Phone Number:	
Web URL:	
Project Manager:	
Software Modules Implemented:	

Reference 2

Organization Name:	
Contact Name:	
Contact Title/Role:	
Contact Phone Number:	
Web URL:	
Project Manager:	
Software Modules Implemented:	

Reference 3

Organization Name:	
Contact Name:	
Contact Title/Role:	
Contact Phone Number:	
Web URL:	
Project Manager:	
Software Modules Implemented:	

Reference 4

Organization Name:	
Contact Name:	
Contact Title/Role:	
Contact Phone Number:	
Web URL:	
Project Manager:	
Software Modules Implemented:	

Statement of work (Attach additional pages as necessary)

Statement of Work		Response
1	Provide a statement of the work to be accomplished. Describe the approach and timeline that you propose to meet the objectives described in the Service specifications listed in Scope of Services (Attachment A).	
2	Include a summary of any services that are recommended by your company that have not been specifically stated in this RFP.	
3	Do you anticipate any problems in meeting the expected implementation timeline?	

Training and Documentation (Attach additional pages as necessary)

Training and Documentation		Response
1	Describe the available training resources and documentation that would be used in the training you provide.	
2	Provide an example of a typical training document that would be used for training classes.	
3	Please attach an example of a typical training plan that would be used for training classes.	
4	Describe the methods used to distribute training documentation.	
5	Can we copy any written user documentation and make it available to our end users on our Intranet?	

ATTACHMENT A

SPECIFICATIONS / SCOPE OF WORK

Project Background Information

The City of Meridian Public Works Department Wastewater Division serves 70,000 customers in providing sewer collection and wastewater processing services. The City has over 492 miles of sewer collection system pipe with 8,840 manholes. Routine maintenance of the collection system was previously contracted out to private companies. In 2008, the City of Meridian began developing an in-house sewer inspection & cleaning program. The program will involve City staff cleaning the collection system, televising the collection system and performing manhole inspections for all sewer infrastructures.

The City Wastewater Treatment Facility processes an average of 5 MGD of sewer per day. As the treatment plant is regulated by a NPDES (National Pollutant Discharge Elimination System) permit issued by EPA (Environmental Protection Agency), the organization mandates "The permittee properly operate and maintain all facilities of treatment and control (and related appurtenances) which are installed or used by the permittee to achieve compliance with conditions of this permit."

In order to meet the NPDES permit requirements and to effectively manage the maintenance and repair of infrastructure of both the collection system and the wastewater treatment plant, the City of Meridian has determined that a computerized infrastructure management system needs to be utilized.

The City of Meridian currently owns the Hansen 7.7 Asset Management Software and has maintained the annual software support. However, the software has been minimally used for the collection system and was implemented without any data structure or naming conventions and is not currently usable. A new installation of the newest version of the Hansen software, Hansen 8 will be utilized for the asset management of sewer, plant and water assets. No data conversion from the Hansen 7 database will occur.

Implementation will involve asset inventory for plant and sewer assets, PM (preventative maintenance) creation, work order management, workflow creation, Sewer Inspections, Neztel interface to CUES TV van. Existing sewer asset data is stored in the City of Meridian GIS database and will be populated in the Hansen 8 software using the Hansen GeoAdministrator tool. Water assets will not be included as part of the initial implementation project, but are expected to be implemented by the City of Meridian at a later date.

Project Approach

The City of Meridian has partnered with the City of Boise to create an implementation team that has extensive knowledge of Hansen 7, procedural documentation, database naming conventions, Crystal Reports, and end user training. Based on this knowledge and skill set, the implementation team is planning on receiving Hansen 8 specific training and performing the configuration of the software in-house with assistance as needed from the successful respondent of this RFP. The Hansen 8 software, GeoAdministrator, and Neztex will be installed by the software vendor, Infor, under a separate contract.

Department Existing Environment

Organization Information	
Number of end users:	25
Number of data analysts/system administrators:	1
Number of staff on implementation team:	2 – Hansen Data Analysts 2 – IT staff 2 – GIS staff
Hansen 8 Licensing Information	
Versions/Specifics	
# of Hansen 8 Plant Licenses purchased/owned	4 concurrent
# of Hansen 8 Sewer Licenses	7 concurrent
# of Hansen 8 Water Licenses Owned	6 concurrent
# of Hansen 8 Customer Service Licenses	4 concurrent
# of Neztex licenses owned	1
# of GeoAdministrator licenses owned	1

Scope of Services

Professional Services Requested:

1) Limited Level of Project Management

Focus shall include, but will not be limited to

- i. Providing input to project plans
- ii. Coordinating project activities between contractor & City of Meridian
- iii. Managing project resources of contractor
- iv. Coordinating project resources of City of Meridian as needed
- v. Monitor project activities and resources to mitigate risk
- vi. Communicating with all necessary parties
- vii. Provide project documentation as required
- viii. Participate in project reviews

2) Hansen 8 Core Team Training

Core Team Training will consist of workshops facilitated in Meridian, Idaho for the City of Meridian's Hansen 8 Implementation Team and additional staff, not to exceed 15 participants.

Hansen 8 Overview

Focus to be on the differences between Hansen 7 and Hansen 8 and features new to Hansen 8.

- SOPs
- Technology of Hansen 8 software
- Searches
- Resources
- Reports
- My Hansen
- Help Files

Hansen 8 Modules

To include a review of the City of Meridian's implementation plan for each module. Focus to be on providing recommendations on industry standard best practices as well as Hansen 8 software features to employ to optimize implementation of each module.

- Asset Management for Plant
- Asset Management for Sewer
- Inspections
- Work Order Management
- Preventative Maintenance Schedules

2) Hansen 8 Initial Advanced Configuration Training

Advanced Configuration Training will consist of instructor led classes in Meridian, Idaho for the City of Meridian's Hansen 8 Implementation Team. Training should be comprehensive enough to allow class attendees to competently use the identified tools/features of the Hansen 8 software at completion of the training. Training documentation must be provided for each participant. Classes will include, at a minimum, the following:

Configuration Tools

- Activity Workflow Manager
- Work Flow Manager
- Content Manager
- Edit My Hansen.

Administrative Tools

- Access Control
- Schema Manager
- Migration Tool

3) Hansen 8 Additional Advanced Configuration Training

Advanced Configuration Training will consist of instructor led classes Meridian, Idaho for the City of Meridian's Hansen 8 Implementation Team. Training should be comprehensive enough to allow class attendees to competently use the identified tools/features of the Hansen 8 software at completion of the training. Training documentation must be provided for each participant. Classes will include, at a minimum, the following:

Configuration Tools

- Detail Page Wizard
- Formula Editor
- Custom Variables Manager

Administrative Tools

- Business Object Model
- Batch Manager

4) Technical Consulting

Additional technical consulting throughout the implementation of the project will be required on an as needed basis. Respondent should be available to provide the following services as needed:

- Project Plan Review/Assistance
- Configuration Consulting
- Report Development Assistance
- Technical Assistance for migration to production
- General Assistance

Examples of technical consulting that may be requested include:

- Assess the Department's readiness to implement Hansen 8 asset management software.
- Define where the Department requires additional education, policies, resources and/or skill sets.
- Develop and Review clearly defined goals and objectives for the implementation planning effort.
- Assessment of existing and planned practices and business processes related to asset management at City of Meridian.
- Perform configuration of sewer main line inspection.

ATTACHMENT B

MILESTONE DATES & DELIVERABLES

Expected Hansen 8 Implementation timeline	
Installation and Training services provided by Infor	July 2009
Overview Training for Core Implementation Team	July 2009
Initial Advanced Training for Core Implementation Team	August 2009
Configuration and Documentation	September 2009
Testing, Report Writing	October 2009
Additional Advanced Configuration Training	November 2009

Project Deliverables

Deliverable	Date Due
Implementation plan review	1 week after initial meeting
Training Documentation	Start of training
Written summary of any facilitated workshops	1 week after workshop
Written review of City of Meridian's readiness To implement Hansen 8	1 week after completion of Initial Advanced Configuration Training

ATTACHMENT C
PRICING SCHEDULE

TO BE SUBMITTED IN A SEPARATE SEALED ENVELOPE

Envelope to be labeled as follows:

PRICING SCHEDULE
RFP PW-09-10074
PROFESSIONAL SERVICES HANSEN 8 IMPLEMENTATION
DUE DATE: June 17, 2009 4:00 p.m.

Pricing Schedule

This contract will be awarded on a not-to-exceed basis. Respondent will submit evidence of time and materials expended in the performance of all tasks identified in this agreement.

Pricing Schedule		Response
1	Provide your standard billing rate sheet.	
2	Provide your rates and policies for reimbursable Expenses	
3	Provide your policies for invoicing	
4	Provide a total project cost for the work plan. For each primary element of the statement of work, detail the staff required, estimated hours, hourly rate, and total rate.	

Professional Services Description	Staff required	Estimated Hours	Hourly Rate	Rate
Project Management				
Core Team Training				
Initial Advanced Configuration Training – Configuration Tools				
Initial Advanced Configuration Training – Administrative Tools				
Additional Advanced Configuration Training – Configuration Tools				
Additional Advanced Configuration Training – Configuration Tools				
Technical Consulting Services				
Travel expenses				
Other Expenses				
Total				

EXHIBIT A1
SAMPLE AGREEMENT

SAMPLE AGREEMENT ONLY

NOT TO BE FILLED OUT

AGREEMENT FOR PROFESSIONAL SERVICES

THIS AGREEMENT FOR PROFESSIONAL SERVICES is made this 7th day of July, 2009, and entered into by and between the City of Meridian, a municipal corporation organized under the laws of the State of Idaho, hereinafter referred to as "CITY", 33 East Broadway Avenue, Meridian, Idaho 83642, and XXXXXXXXXXXXXXXXXX, hereinafter referred to as "CONSULTANT", whose business address is XXXXXXXXXXXXXXXXXXXXXXXXXXXX.

INTRODUCTION

Whereas, the City has a need for services involving XXXXXXXXXXXXXXXXXXXXXXXXXXXX; and

WHEREAS, the Consultant is specially trained, experienced and competent to perform and has agreed to provide such services;

NOW, THEREFORE, in consideration of the mutual promises, covenants, terms and conditions hereinafter contained, the parties agree as follows:

TERMS AND CONDITIONS

1. Scope of Services:

1.1 CONSULTANT shall perform and furnish to the City upon execution of this Agreement and receipt of the City's written notice to proceed, all services, and comply in all respects, as specified in the document titled "Scope of Services" a copy of which is attached hereto as Exhibit "A" and incorporated herein by this reference, together with any amendments that may be agreed to in writing by the parties.

1.2 All documents, drawings and written work product prepared or produced by the Consultant under this Agreement, including without limitation electronic data files, are the property of the Consultant; provided, however, the City shall have the right to reproduce, publish and use all such work, or any part thereof, in any manner and for any purposes whatsoever and to authorize others to do so. If any such work is copyrightable, the Consultant may copyright the same, except that, as to any work which is copyrighted by the Consultant, the City reserves a

royalty-free, non-exclusive, and irrevocable license to reproduce, publish and use such work, or any part thereof, and to authorize others to do so.

1.3 The Consultant shall provide services and work under this Agreement consistent with the requirements and standards established by applicable federal, state and city laws, ordinances, regulations and resolutions. The Consultant represents and warrants that it will perform its work in accordance with generally accepted industry standards and practices for the profession or professions that are used in performance of this Agreement and that are in effect at the time of performance of this Agreement. Except for that representation and any representations made or contained in any proposal submitted by the Consultant and any reports or opinions prepared or issued as part of the work performed by the Consultant under this Agreement, Consultant makes no other warranties, either express or implied, as part of this Agreement.

1.4 Services and work provide by the consultant at the City's request under this Agreement will be performed in a timely manner in accordance with a Schedule of Work, which the parties hereto shall agree to. The Schedule of Work may be revised from time to time upon mutual written consent of the parties.

2. Consideration

2.1 The Consultant shall be compensated on a Time & materials/Lump Sum basis as provided in Exhibit B "Payment Schedule" attached hereto and by reference made a part hereof.

2.2 The Consultant shall provide the City with a monthly statement , as services warrant, of fees earned and costs incurred for services provided during the billing period, which the City will pay within 30 days of receipt of a correct invoice and approval by the City. The City will not withhold any Federal or State income taxes or Social Security Tax from any payment made by City to Consultant under the terms and conditions of this Agreement. Payment of all taxes and other assessments on such sums is the sole responsibility of Consultant.

2.3 Except as expressly provided in this Agreement, Consultant shall not be entitled to no receive from the City any additional consideration, compensation, salary, wages, or other type of remuneration for services rendered under this Agreement., including , but not limited to, meals, lodging, transportation, drawings, renderings or mockups. Specifically, Consultant shall not be entitled by virtue of this Agreement to consideration in the form of overtime, health insurance benefits, retirement benefits, paid holidays or other paid leaves of absence of any type or kind whatsoever.

3. Time of Performance:

This agreement shall become effective upon execution by both parties, and shall expire upon completion of the agreed upon services, September 30, 2009 or unless sooner terminated as provided below or unless some other method or time of termination is listed in Exhibit A. This Agreement shall terminate automatically on the occurrence of (a) bankruptcy or insolvency of either party, or (b) sale of Consultants business.

4. Independent Contractor:

4.1 In all matters pertaining to this agreement, CONSULTANT shall be acting as an independent contractor, and neither CONSULTANT nor any officer, employee or agent of CONSULTANT will be deemed an employee of CITY. Except as expressly provided in Exhibit A, Consultant has no authority or responsibility to exercise any rights or power vested in the City. The selection and designation of the personnel of the CITY in the performance of this agreement shall be made by the CITY.

4.2 Consultant shall determine the method, details and means of performing the work and services to be provided by Consultant under this Agreement. Consultant shall be responsible to City only for the requirements and results specified in this Agreement and, except as expressly provided in this Agreement, shall not be subjected to City's control with respect to the physical action or activities of Consultant in fulfillment of this Agreement.

5. Indemnification and Insurance:

CONSULTANT shall indemnify and save and hold harmless CITY from and for any and all losses, claims, actions, judgments for damages, or injury to persons or property and losses and expenses and other costs including litigation costs and attorney's fees, arising out of, resulting from, or in connection with the performance of this Agreement by the CONSULTANT, its servants, agents, officers, employees, guests, and business invitees, and not caused by or arising out of the tortuous conduct of CITY or its employees. CONSULTANT shall maintain, and specifically agrees that it will maintain, throughout the term of this Agreement, liability insurance, in which the CITY shall be named an additional insured in the minimum amounts as follow: General Liability One Million Dollars (\$1,000,000) per incident or occurrence, Professional Liability / Professional errors and omissions One Million Dollars (\$1,000,000) aggregate, Automobile Liability Insurance One Million Dollars (\$1,000,000) per incident or occurrence and Workers' Compensation Insurance , in the statutory limits as required by law.. The limits of insurance shall not be deemed a limitation of the covenants to indemnify and save and hold harmless CITY; and if CITY becomes liable for an amount in excess of the

insurance limits, herein provided, CONSULTANT covenants and agrees to indemnify and save and hold harmless CITY from and for all such losses, claims, actions, or judgments for damages or injury to persons or property and other costs, including litigation costs and attorneys' fees, arising out of, resulting from , or in connection with the performance of this Agreement by the Consultant or Consultant's officers, employs, agents, representatives or subcontractors and resulting in or attributable to personal injury, death, or damage or destruction to tangible or intangible property, including use of. CONSULTANT shall provide CITY with a Certificate of Insurance, or other proof of insurance evidencing CONSULTANT'S compliance with the requirements of this paragraph and file such proof of insurance with the CITY at least ten (10) days prior to the date Consultant begins performance of it's obligations under this Agreement. In the event the insurance minimums are changed, CONSULTANT shall immediately submit proof of compliance with the changed limits. Evidence of all insurance shall be submitted to the City Purchasing Agent with a copy to Meridian City Accounting, 33 East Broadway Avenue, Meridian, Idaho 83642.

- 6. **Notices:** Any and all notices required to be given by either of the parties hereto, unless otherwise stated in this agreement, shall be in writing and be deemed communicated when mailed in the United States mail, certified, return receipt requested, addressed as follows:

City of Meridian
Purchasing Agent
33 E. Broadway Avenue
Meridian, Idaho 83642

XXXXXXXXXXXXXXXXXXXXX
Attn: _____

Either party may change their address for the purpose of this paragraph by giving written notice of such change to the other in the manner herein provided.

- 8. **Attorney Fees:** Should any litigation be commenced between the parties hereto concerning this Agreement, the prevailing party shall be entitled, in addition to any other relief as may be granted, to court costs and reasonable attorneys' fees as determined by a Court of competent jurisdiction. This provision shall be deemed to be a separate contract between the parties and shall survive any default, termination or forfeiture of this Agreement.
- 9. **Time is of the Essence:** The parties hereto acknowledge and agree that time is strictly of the essence with respect to each and every term, condition and provision hereof, and that the failure to timely perform any of

the obligations hereunder shall constitute a breach of, and a default under, this Agreement by the party so failing to perform.

10. **Assignment:** It is expressly agreed and understood by the parties hereto, that CONSULTANT shall not have the right to assign, transfer, hypothecate or sell any of its rights under this Agreement except upon the prior express written consent of CITY.
11. **Discrimination Prohibited:** In performing the Services required herein, CONSULTANT shall not unlawfully discriminate in violation of any federal, state or local law, rule or regulation against any person on the basis of race, color, religion, sex, national origin or ancestry, age or disability.
12. **Reports and Information:**
 - 12.1 At such times and in such forms as the CITY may require, there shall be furnished to the CITY such statements, records, reports, data and information as the CITY may request pertaining to matters covered by this Agreement.
 - 12.2 Consultant shall maintain all writings, documents and records prepared or compiled in connection with the performance of this Agreement for a minimum of four (4) years from the termination or completion of this or Agreement. This includes any handwriting, typewriting, printing, photo static, photographic and every other means of recording upon any tangible thing, any form of communication or representation including letters, words, pictures, sounds or symbols or any combination thereof.
13. **Audits and Inspections:** At any time during normal business hours and as often as the CITY may deem necessary, there shall be made available to the CITY for examination all of CONSULTANT'S records with respect to all matters covered by this Agreement. CONSULTANT shall permit the CITY to audit, examine, and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls, records of personnel, conditions of employment and other data relating to all matters covered by this Agreement.
14. **Publication, Reproduction and Use of Material:** No material produced in whole or in part under this Agreement shall be subject to copyright in the United States or in any other country. The CITY shall have unrestricted authority to publish, disclose and otherwise use, in whole or in part, any reports, data or other materials prepared under this Agreement.
15. **Compliance with Laws:** In performing the scope of services required hereunder, CONSULTANT shall comply with all applicable laws, ordinances, and codes of Federal, State, and local governments.
16. **Changes:** The CITY may, from time to time, request changes in the Scope of Services to be performed hereunder. Such changes, including

any increase or decrease in the amount of CONSULTANT'S compensation, which are mutually agreed upon by and between the CITY and CONSULTANT, shall be incorporated in written amendments to this Agreement.

17. **Termination:** If, through any cause, CONSULTANT, its officers, employees, or agents fails to fulfill in a timely and proper manner its obligations under this Agreement, violates any of the covenants, agreements, or stipulations of this Agreement, falsifies any record or document required to be prepared under this agreement, engages in fraud, dishonesty, or any other act of misconduct in the performance of this contract, or if the City Council determines that termination of this Agreement is in the best interest of CITY, the CITY shall thereupon have the right to terminate this Agreement by giving written notice to CONSULTANT of such termination and specifying the effective date thereof at least fifteen (15) days before the effective date of such termination. CONSULTANT may terminate this agreement at any time by giving at least sixty (60) days notice to CITY.

In the event of any termination of this Agreement, all finished or unfinished documents, data, and reports prepared by CONSULTANT under this Agreement shall, at the option of the CITY, become its property, and CONSULTANT shall be entitled to receive just and equitable compensation for any work satisfactorily complete hereunder.

Notwithstanding the above, CONSULTANT shall not be relieved of liability to the CITY for damages sustained by the CITY by virtue of any breach of this Agreement by CONSULTANT, and the CITY may withhold any payments to CONSULTANT for the purposes of set-off until such time as the exact amount of damages due the CITY from CONSULTANT is determined. This provision shall survive the termination of this agreement and shall not relieve CONSULTANT of its liability to the CITY for damages.

18. **Construction and Severability:** If any part of this Agreement is held to be invalid or unenforceable, such holding will not affect the validity or enforceability of any other part of this Agreement so long as the remainder of the Agreement is reasonably capable of completion.
19. **Advice of Attorney:** Each party warrants and represents that in executing this Agreement. It has received independent legal advice from it's attorney's or the opportunity to seek such advice.
19. **Entire Agreement:** This Agreement contains the entire agreement of the parties and supersedes any and all other agreements or understandings, oral or written, whether previous to the execution hereof or contemporaneous herewith.

20. **Applicable Law:** This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of Idaho, and the ordinances of the City of Meridian.
21. **Approval Required:** This Agreement shall not become effective or binding until approved by the City of Meridian.

CITY OF MERIDIAN

CONSULTANT

BY: _____
TAMMY de WEERD, MAYOR

BY: _____

Attest:

JAYCEE HOLMAN, CITY CLERK

Approved as to Content

BY: _____

KEITH WATTS, PURCHASING AGENT

Dated: _____

Department Approval

BY: _____

NAME: _____

TITLE: _____

Dated: _____

Approved as to Form

CITY ATTORNEY

Attachment A

SCOPE OF SERVICES
(SAMPLE)

Attachment B

PAYMENT SCHEDULE

(SAMPLE)

A. Total and complete compensation for this Agreement shall not exceed \$XXXX.XX excluding travel expenses.

TASK	DESCRIPTION	AMOUNT
A.		
B.		
C.		
D.		
E.		
F.		
G.		
H.		
TOTAL		\$

Travel expenses will be paid at no more than the City of Meridian's Travel and Expense Reimbursement Policy.