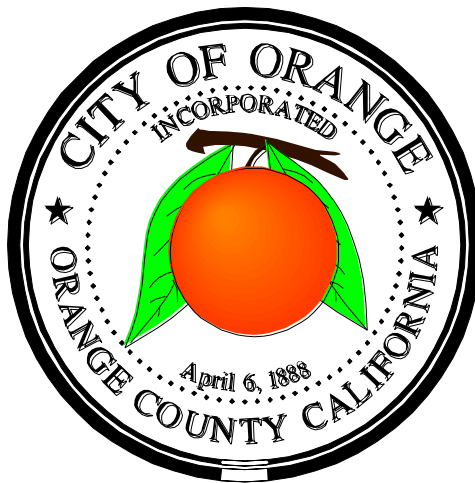


REQUEST FOR PROPOSAL No. 20-21.15
FOR
Work Order and Asset Management System
and
Implementation Services



Issue Date
Thursday, September 24, 2020

Response Due Date/Time
Thursday, November 5, 2020, by 2:00 PM PDT

CAUTION

THIS DOCUMENT MUST REMAIN INTACT



TABLE OF CONTENTS

1.	RFP Overview	1
1.1	Purpose of RFP	1
1.2	RFP Timeline	2
1.3	RFP Amendment and Cancellation.....	2
1.4	Questions Pertaining to the RFP	3
1.5	Proposal Submittal	3
1.6	Public Records Law.....	5
2.	Project Overview.....	6
2.1	Project Objectives / General User Requirements.....	6
3.	Background	7
3.1	City Overview	7
3.2	Public Works	7
3.2.1	Engineering Division.....	7
3.2.2	Street Maintenance and Operations Division.....	8
3.2.3	Traffic Engineering and Operations Division.....	8
3.2.4	Water Division	8
3.3	Community Services	9
3.3.1	Environmental Services Division (Parks and Park Facilities)	9
3.4	Key Operating Statistics	10
4.	City Assets.....	11
4.1	City Buildings and Facilities	11
4.2	City-owned Fleet / Vehicle Assets	11
4.3	Water Services Assets	12
4.4	Stormwater Assets	13
4.5	Wastewater Assets.....	13
4.6	Park Assets	14
4.7	Streets and Traffic Assets	15
5.	Current Environment.....	17
5.1	Information Technology Organization	17
5.2	Current City Technology Standards.....	17
5.3	Integrations	17
5.4	Data Conversion.....	18
6.	Proposal Submission Requirements	19
6.1	General Instructions	19
6.2	Proposal Format.....	19
6.2.1	Cover Letter	19
6.2.2	Table of Contents.....	20
6.2.3	Section 1 – Executive Summary.....	20
6.2.4	Section 2 – Company Details	20
6.2.5	Section 3 – Company Qualifications.....	21
6.2.6	Section 4 – References	21
6.2.7	Section 5 – Proposed Solution	22
6.2.8	Section 6 – Implementation Approach and Work Plan	23
6.2.9	Section 7 – Other Requirements	23

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



6.2.10	Section 8 – Pricing	24
6.2.11	Section 9 – Software Licensing and Maintenance Agreements	26
7.	Proposal Evaluation	27
8.	General Requirements	28
8.1	Collusion	28
8.2	Gratuities	28
8.3	Required Review and Waiver of Objections by Proposers	28
8.4	Nondiscrimination	28
8.5	Proposal Withdrawal	29
8.6	Proposal Errors	29
8.7	Incorrect Proposal Information	29
8.8	Prohibition of Proposer Terms and Conditions	29
8.9	Assignment and Subcontracting	29
8.10	Right to Refuse Personnel	29
8.11	Proposal of Additional Services	29
8.12	Licensure	30
8.13	Conflict of Interest and Proposal Restrictions	30
8.14	Contract Negotiations	30
8.15	Execution of Contract	30
8.16	Right of Rejection	30
8.17	Disclosure of Proposal Contents	31
8.18	Proprietary Information	31
8.19	Severability	31
8.20	RFP and Proposal Incorporated into Final Contract	31
8.21	Proposal Amendment	31
8.22	Consultant Participation	32
8.23	Warranty	32
8.24	Rights of the City	32
	Appendix A – Standard Terms and Conditions	33
	Appendix B – Insurance Requirements	39
	Appendix C – Requirements Checklist	41
	Appendix D – Mandatory Pricing Sheets	42
	Appendix E – Certificate of Non-Collusion	43



1. RFP Overview

1.1 Purpose of RFP

The purpose of this RFP is to solicit responses from qualified vendors offering a software solution that includes functionality and features to meet the City's identified requirements for an integrated Work Order and Asset Management System (WAMS). The City will also be looking to partner with the selected vendor to provide the associated professional services to complete implementation.

The City is interested in a solution that provides all the functionality identified below by a single proposer. Detailed functional requirements are provided in Appendix C – Requirements Checklist. At a **minimum**, the proposed solution should include the following integrated functions:

- Asset Management
- Service Requests
- Work Orders
- Preventative Maintenance
- Inventory Management
- GIS Integration
- Reporting and Analysis

In addition to the software functionality identified above, the City is seeking a Proposer to provide professional services that will ensure a successful implementation. The professional services should include the following:

- Project Management
- Software Installation and Configuration
- Business Process Review and Redesign
- Implementation Consulting
- Conversion Services
- Acceptance Testing Support
- Training
- Documentation
- Report Writing
- Software Maintenance and Support

The City is interested in evaluating both on-premises solutions and alternative cloud-based service and support models. Proposers are encouraged to offer alternatives to the traditional license purchase approach. If alternatives are offered, the Proposer should clearly identify what is being offered and the pricing to allow the City to fully evaluate the offering as compared to all vendor proposals.

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



The City expects respondents to this RFP to propose and provide all materials and services that will be required to fulfill or exceed the requirements and conditions set forth in this RFP.

1.2 RFP Timeline

Table 1, RFP Schedule of Events, identifies the RFP schedule that will be followed; dates are subject to change.

Table 1 – RFP Schedule of Events

RFP EVENT	DATE / TIME
City Issues RFP	Thursday, September 24, 2020
Deadline for Proposer Questions	Thursday, October 8, 2020 By 2:00 PM PDT
City Responses to All Questions	Thursday, October 15, 2020
Deadline for Proposal Submission	Thursday, November 5, 2020 By 2:00 PM PDT
City Completes Evaluations	December 2020
Finalist(s) Notified & Proof of Capabilities (POC) Packet Provided	January 2021
POC Demonstration(s) & Final Due Diligence	February 2021
Select Vendor & Begin Negotiations	March 2021
Council Approval / Award of Contract	TBD
Final Negotiation & Contract Execution	TBD
Project Kickoff	TBD

Proposers should be aware that finalist(s) will be required to participate in a scripted proof-of-capabilities (POC) demonstration to allow staff to fully understand the proposed solution. A determination will be made in whether the POC will be requested to be onsite or if a remote-hosted POC will be allowed. The POC is not intended to be a generic demonstration of the application, but rather a demonstration of specific product functionality deemed most critical to the City using scenarios provided by the City. Proposers must be prepared to invest the time and resources in preparation for the POC to be successful on this procurement.

The City reserves the right, at its sole discretion, to adjust this schedule as it deems necessary. Notification of any adjustment to the RFP Schedule of Events will be posted on the City's website.

1.3 RFP Amendment and Cancellation

The City reserves the unilateral right to amend this RFP in writing at any time. The City also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued, it will be posted to the City website; it will be the responsibility of respondents to monitor the City website for updates to this RFP. Interested responders should subscribe to receive RFP updates and notifications via the City's website at <https://www.cityoforange.org/Bids.aspx?CatID=17> in order to receive email updates of any revised/additional information and addenda. Proposers will respond to the final written RFP and any exhibits, attachments, and amendments.



1.4 Questions Pertaining to the RFP

All questions and inquiries related to contract terms and conditions, and scope of work requirements contained within this Request for Proposal ("RFP") should be submitted by email to Wanda Alvarez, Purchasing Officer at walvarez@cityoforange.org.

The City Purchasing Officer will initiate all official communications concerning this RFP. Any city response relevant to this RFP other than through, or approved by, the City's Purchasing Officer is unauthorized and will be considered invalid.

1.5 Proposal Submittal

Proposals are to be properly identified on the outside and are due by 2:00 P.M. PDT on the date identified in Table 1 – RFP Schedule of Events, and shall be delivered in a sealed package(s) to:

RE: RFP No. 20-21.15
City Clerk – Purchasing Division
City of Orange
300 E. Chapman Avenue
Orange, California 92866

Proposals must be clearly identified by proposal number and sent in a sealed package. **It is the responsibility of the Responder to ensure timely delivery is made to the City Clerk in the City of Orange.**

1. Proposals must be valid for a period of 120 calendar days from the Closing Date and Time for Receipt of Proposals. No Proposal may be withdrawn after the submission date.
2. Each Responder must provide **five (5) bound copies and one (1) unbound copy** of its proposal, including a completed copy of the Requirements document; the Proposer's completed Vendor Cost Worksheet should be provided as a separate document (not bound with the other documents). **One (1) bound copy is to be clearly marked as "original" on the outside cover and contain an original signature.** An electronic (soft) copy on a USB drive or other standard digital storage device is also required, including all submission components; the Vendor Cost Worksheet must be provided in native Excel format (not PDF).
3. All Proposals shall be submitted on standard 8.5 x 11-inch paper. All pages should be numbered and identified sequentially by section. Proposals must be tabbed and indexed in accordance with the information requested in Section 6.2 of this document. *It is imperative that all Responders responding to this RFP comply exactly and completely with the instructions set forth herein; Proposals which do not comply may be deemed nonresponsive.*
4. The Responder's Proposal must not be marked as confidential or proprietary. The City may refuse to consider a Proposal if marked. Information in Proposals shall become public property and subject to disclosure laws. All Proposals shall become the property of the City. The City reserves the right to make use of any information or ideas in the Proposals.

**Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services**



5. By submitting a Proposal, the Responder represents that it has thoroughly examined and become familiar with the work required under this RFP and that it can provide and performing quality work to achieve the City objectives.
6. Pre-contractual expenses are defined as expenses incurred by the Responder in:
 - preparing its Proposal in response to this RFP;
 - submitting that Proposal to the City;
 - negotiating with the City any matter related to the Responder's Proposal; and
 - any other expenses incurred by the Responder prior to the date of award and execution, if any, of the Agreement.

The City shall not, in any event, be liable for any pre-contractual expenses incurred by Responders in the preparation of their Proposal.

7. Each Responder must submit its Proposal in strict accordance with all requirements of this RFP and compliance must be stated in the Proposal. Deviations, clarifications, and/or exceptions must be clearly identified and listed separately as alternative items for the City's consideration.
8. Each Responder is encouraged to be responsive to the requirements stated in this RFP. If, however, any Responder feels that it can offer substantial cost/benefit and/or performance advantages, the City of Orange will consider and may accept *alternate* Proposals. *Alternate Proposals must specify how they deviate from the requirements and describe cost reduction or other benefits to be achieved. Alternate Proposals must be submitted as separate Proposals clearly marked "alternate" on the outside cover.*
9. After the Closing Date and Time for Receipt of Proposals, evaluation and proposal clarification will commence.
10. In the event the City deems it necessary to clarify or make any changes to this RFP, these changes shall be made in the form of a written addendum authorized and issued only by the City Purchasing Officer or authorized designee.
11. The City reserves the right to negotiate modifications with any Responder as necessary to serve the best interest of the City. Any Proposal may be rejected if it is conditional, incomplete or deviates from specifications in this request. The City reserves the right to waive, at its discretion, any procedural irregularity, immaterial defects, or other improprieties which the City deems reasonably correctable or otherwise not warranting rejection of the Proposal. Any waiver will not excuse a proponent from full compliance.
12. The City reserves the right to:
 - negotiate the final Agreement with any Responder(s) as necessary to serve the best interest of the City;
 - withdraw this RFP at any time without prior notice and, furthermore, makes no representations that any contract will be awarded to any Responder responding to this RFP; or
 - award its total requirements to one Responder or to apportion those requirements among two or more Responders as the City may deem to be in its best interest.

**Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services**



In addition, negotiations may or may not be conducted with Responders; therefore, the Proposal submitted should contain the Responder's most favorable terms and conditions, since the selection and award may be made without discussion with any Responder.

13. Where two or more Responders desire to submit a single proposal in response to this RFP, they should do so on a prime/sub-contractor basis rather than as a joint venture. The City intends to contract with a single firm and not with multiple firms doing business as a joint venture.
14. The City requires the Responder to include the following form to be submitted with their Proposal:
 - **Certificate of Non-Collusion Affidavit:** Responder, as part of its proposal, must submit the completed Certificate of Non-Collusion form (Appendix E).

1.6 Public Records Law

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to this code section. See Section 8.18 regarding proprietary response content.



2. Project Overview

2.1 Project Objectives / General User Requirements

The City seeks a proven, fully integrated (i.e., data entered in one proposed solution module is available as appropriate in other proposed solution modules) WAMS solution. It is willing to modify existing business processes to accommodate best practices and will be looking to select a system that drives the implementation of those best practices. Proposed solutions should provide the following capabilities in terms of its user interface and other general system characteristics:

- ♦ Prolongs asset life to achieve the maximum return on investment
- ♦ Aids decision making related to asset rehabilitation, repair, or replacement
- ♦ Supports financial and capital planning and long-term funding strategy development
- ♦ Supports the planning, engineering, and construction of new assets
- ♦ Provides appropriate updates to fixed assets
- ♦ Ensures meeting public service expectations
- ♦ Promotes the move from reactive to predictive maintenance activities
- ♦ Supports regulatory requirements reporting and ensures regulations are met including providing the means to charge costs to appropriate regulatory accounts
- ♦ Improves inventory and warehouse management to reduce cost
- ♦ Supports job and activity costing to determine the true cost of asset management
- ♦ Increases staff productivity through improved access to information and better coordinated work plans
- ♦ Increases capability and transparency throughout the organization about asset management
- ♦ Improves understanding of asset condition and improves the integrity of asset related data
- ♦ Supports the development of performance measures and promotes continuous improvement



3. Background

3.1 City Overview

The City of Orange, with a population of 138,640, is situated in Central Orange County, approximately 32 miles southeast of Los Angeles. The City's land area is 27 square miles, and the City's planning area is 38 square miles, with a "Sphere of Influence" area of 55 square miles. Included in the City's Sphere of Influence are 18,500 acres of undeveloped land owned by The Irvine Company.

Under a council-manager form of government, a mayor is elected every two years and four council members are elected to four-year terms alternating on a two-year basis. The City Manager, who is the administrative official of the City, is appointed by the City Council.

The City provides a full range of services for its citizens. These services include:

- ◆ Emergency transportation
- ◆ Fire
- ◆ General administration
- ◆ Library
- ◆ Paramedic
- ◆ Planning and development
- ◆ Police
- ◆ Recreation and park
- ◆ Street improvements and lighting
- ◆ Water utility
- ◆ Refuse collection and sanitation

3.2 Public Works

The Public Works Department provides for the city's infrastructure, including traffic and engineering, sewers and storm drains, water service, street maintenance, and more. The Department is comprised of the Engineering Division, Street Maintenance and Operations Division, Traffic Engineering and Operations Division, and the Water Division.

Note that the City's trash, recyclables, and organics (green waste and food waste) are collected under contract by CR&R Incorporated; street sweeping is also contracted out.

3.2.1 Engineering Division

The Engineering Division provides the following engineering related functions:

- ◆ Design and Construction Management
 - This section is responsible for the design of most of the City's major infrastructure improvements including streets, sewers, storm drains, and buildings. Once



contracts are awarded, this section manages and inspects active construction projects, verifying that projects are built to the required specifications.

- ♦ Development Services
 - This section provides engineering services for public and private improvements, issuing permits for grading and encroachments, checking plans, and assuring conformance with requirements for public improvements including streets, alleys, sidewalks, curbs and gutters, sewers and storm drains.
- ♦ Environmental and Water Quality
 - This section provides enforcement of current water quality regulations, review and site inspection of water quality, and storm water runoff.
- ♦ Real Property
 - The section is responsible for the processing of all property transactions including easements, rights-of-way, and condemnations. The Real Property Section also disposes of excess property.
- ♦ Geographic Information Systems (GIS)
 - This section maintains infrastructure databases and public works records, This information is available to builders, contractors, developers and the general public.

3.2.2 Street Maintenance and Operations Division

The Street Division is responsible for the maintenance and repair of the City's roadways, sidewalks, sewer, and storm drain systems, roadway striping, street signs and markers, City facilities including public parking lots and structure, as well as being responsible for parkway trees, and sanitation code compliance. Additionally, the Street Maintenance Division oversees the Graffiti and Abandoned Shopping Cart Hotline.

3.2.3 Traffic Engineering and Operations Division

This division combines traffic engineering and traffic field operations. Traffic engineering designs, analyzes, and plans for traffic capacities and safe traffic movement throughout the City. Traffic Operations designs, constructs, and maintains various facilities including traffic signals, streetlights, roadway striping, traffic control signs and pavement markers.

The Traffic Engineering and Operations Division provides the following related functions:

- ♦ The safe and efficient movement of traffic within the city is Traffic Engineering's primary responsibility. Additionally, Traffic Engineering designs, constructs, and maintains the traffic signal and the streetlight systems.
- ♦ Traffic Engineering is responsible for the issuance of traffic permits, dirt hauling permits, transportation, and parking permits.

3.2.4 Water Division

The Water Division is responsible for providing a clean, safe, potable water supply to the City of Orange. The Division designs, constructs, and maintains wells, water lines, booster pumps, and



reservoirs that serve the residents and businesses with water for domestic use and for fire protection.

The Water Division provides the following related functions:

- ♦ Water Services
 - The Water Division is responsible for providing clean, safe water to the City of Orange and for designing and constructing the system that supplies the residents and businesses with water.
- ♦ Water Quality
 - The routine monitoring and testing of water to ensure conformance to state and federal regulations, and to provide the highest-quality water to City residents.
- ♦ Hydrant Flushing
 - Hydrant flushing is necessary to test the hydrants to make sure adequate flow and pressure is available. Flushing is also done to remove sediment from the pipes to maintain water clarity and quality in the distribution pipes.
- ♦ Water Conservation

3.3 Community Services

The Community Services Department is responsible for all City parks and trails. The Department includes Administration, Recreation and Environmental Services (Parks and Park Facilities).

3.3.1 Environmental Services Division (Parks and Park Facilities)

- ♦ Environmental Services Division (Parks and Park Facilities) maintains all public landscapes in the City; included in that inventory are:
 - Landscape medians, parkways and planter areas in the road right of way, the Main Library and branch libraries, Civic Center facilities, Fire stations, Orange Senior Center, Police Headquarters, public parking lots, Orange train Depot and Parking Lots, Parking Structure, City water well and reservoir sites, and other City owned properties.
 - 22 parks, each with unique amenities.
- ♦ The following Assessment Districts are in the City of Orange: Santiago Hills Landscape Assessment District, Sycamore Crossing Landscape Assessment District, Del Rio Community Facilities District.
 - The City is responsible for maintaining landscape and greenbelt areas, irrigation systems, walks and walkway lighting in these districts
- ♦ Recreational trails
 - Many recreational and equestrian trails as well as on street and off-street bikeways.



- The Santiago Creek Bike Trail (SCBT), which consists of a paved trail spanning six miles along the Santiago Creek, and linking four City of Orange Parks.

3.4 Key Operating Statistics

Table 2, Key Statistics, provides proposers with statistical information that will help promote an understanding of the current environment.

Table 2 – Key Statistics

CATEGORY	COUNT
Department Users (active and casual)	25
Field Support Staff	80
Citizen Complaints / Work Orders / Service Requests	Approximately 6,000



4. City Assets

The following tables identify City assets that are likely to be included in the City's planned implementation of a Work Order and Asset Management System.

4.1 City Buildings and Facilities

Table 3, City Buildings and Facilities, identifies current City of Orange buildings and facilities, including corresponding addresses and GIS layer, if any.

Table 3 – City Buildings and Facilities

BUILDING / FACILITY	ADDRESS	GIS LAYER
City Hall	300 E. Chapman Avenue	ReferenceData/FacilitySite
Community Services	230 E. Chapman Avenue	ReferenceData/FacilitySite
Fire Headquarters	176 S. Grand Street	ReferenceData/FacilitySite
Fire Station # 2	2900 E. Collins Avenue	ReferenceData/FacilitySite
Fire Station # 3	1910 N. Shaffer Street	ReferenceData/FacilitySite
Fire Station # 4	210 S. Esplanade	ReferenceData/FacilitySite
Fire Station # 5	1345 W. Maple Street	ReferenceData/FacilitySite
Fire Station # 6	345 City Drive South	ReferenceData/FacilitySite
Fire Station # 7	7401 Fort Road	ReferenceData/FacilitySite
Fire Station # 8	5725 E. Carver Lane	ReferenceData/FacilitySite
Library - Main	407 E. Chapman Avenue	ReferenceData/FacilitySite
Library - El Modena Branch	380 S. Hewes Street	ReferenceData/FacilitySite
Library - Taft Branch	740 E. Taft Avenue	ReferenceData/FacilitySite
Police Headquarters	1107 N. Batavia Street	ReferenceData/FacilitySite
Police Sub-Station	8525 E. Fort Road	ReferenceData/FacilitySite
Public Works Corporation Yard	637 W. Struck Ave.	ReferenceData/FacilitySite
The Block at Orange Police Substation	20 City Blvd.	ReferenceData/FacilitySite
Water Plant	189 S. Water Street	ReferenceData/FacilitySite
Old Towne West Metrolink Parking Structure	130 N. Lemon Street	ReferenceData/FacilitySite
Santa Fe Depot	186 N. Atchison Street	ReferenceData/FacilitySite

4.2 City-owned Fleet / Vehicle Assets

Table 4, City-owned Fleet / Vehicles, provides current counts by type of City of Orange vehicles.

Table 4 – City-owned Fleet / Vehicles

VEHICLE TYPE	COUNT
Police vehicles	65

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



VEHICLE TYPE	COUNT
Sedans / small vans / wagons	112
Pick-up Trucks (less than 1 ton)	68
Pick-up Trucks (more than 1 ton)	42
Tanker Trucks	3
Street Sweepers	2
Light Equipment (i.e., forklifts, trailers, etc.)	40
Fire vehicles	59
Heavy equipment (i.e., scrapers, backhoes, loaders, generators, etc.)	18
Police Motorcycles	15

4.3 Water Services Assets

Table 5, Water Services Assets, provides metrics by asset class; the corresponding GIS layer, if any, is also indicated.

Table 5 – Water Services Assets

ASSET CLASS	METRIC	GIS LAYER
Water Mains	446 miles	wMain
Service Laterals	TBD	Future Layer
Water System Fittings	13,214	wFitting
Water System Casings	0	wCasing
Water Meters	0	Future Layer
Meter Reading Devices	0	None
Water System Pumps	26	wPump
Chemical Storage Tanks	0	None
Hydro-pneumatic Tanks	0	None
Control Valves	286	wControlValve
Backflow Devices	0	None
Control Valves	286	wControlValve
Air Release Valves	182	wControlValve
Pressure Reducing Valves	42	wControlValve
Pressure Reducing Stations	0	None
Water Meter Boxes	0	None
SCADA Sensors	0	None
Network Structures	1	wNetworkStructure
Water System Structures	0	Future Layer
Communication Towers	0	None
Fire Hydrants	5,624	wHydrant
Production Well	18	wProductionWell
Reservoir	19	wReservoir



4.4 Stormwater Assets

Table 6, Stormwater Assets, provides metrics by asset class; the corresponding GIS layer, if any, is also indicated.

Table 6 – Stormwater Assets

ASSET CLASS	METRIC	GIS LAYER
Stormwater Casings	0	swCasing
Stormwater Cleanouts	1	swCleanOut
Stormwater Control Valves	0	swControlValve
Inlets	2,448	swInlet
Stormwater Detention Basins	0	swDetention
Stormwater Discharge Points	360	swDischargePoint
Stormwater Fittings	82	swFitting
Stormwater Gravity Mains	108.8 miles	swGravityMain
Stormwater Manholes	1,005	swManhole
Stormwater Network Structures	48	swNetworkStructure
Stormwater Open Drains	4.8 miles	swOpenDrain
Stormwater Pressure Pipes	4.8 miles	swOpenDrain
Stormwater System Valves	0	swPressurePipe
Stormwater Weir Structures	0	swWeirStructure
Stormwater / Trash Capture Devices	0	swSystemValve

4.5 Wastewater Assets

Table 7, Wastewater Assets, provides metrics by asset class; the corresponding GIS layer, if any, is also indicated.

Table 7 – Wastewater Assets

ASSET CLASS	METRIC	GIS LAYER
Sanitary Sewer Cleanouts	50	ssCleanOut
Sanitary Sewer Control Valves	1	ssControlValve
Sanitary Sewer Discharge Point	0	ssDischargePoint
Sanitary Sewer Fittings	763	ssFitting
Sanitary Sewer Gravity Mains	313 miles	ssGravityMain
Sanitary Sewer Inlets	0	ssInlet
Sanitary Sewer Lateral Lines	367	ssLateralLine
Sanitary Sewer Manholes	7,058	ssManhole
Sanitary Sewer Network Structures	6	ssNetworkStructure
Sanitary Sewer Pressurized Mains	2	ssPressurizedMain
Sanitary Sewer Pumps	0	ssPump
Sanitary Sewer System Valves	0	ssSystemValve
Sanitary Sewer Vaults	0	ssVault



ASSET CLASS	METRIC	GIS LAYER
Lift Stations	2	ssPump

4.6 Park Assets

Table 8a, Parks, identifies current City of Orange parks and related facilities, including corresponding addresses and GIS layer, if any; Table 8b, Parks Assets, identifies current Parks assets, including corresponding addresses/metrics and GIS layer, if any.

Table 8a – Parks

PARK	ADDRESS / METRIC	GIS LAYER
Steve Ambriz Memorial Park	611 W. Riverbend Parkway	ReferenceData/Park
Fred Barrera Park	8380 E. Serrano Avenue	ReferenceData/Park
Belmont Park	4536 E. Via Escola Avenue	ReferenceData/Park
Eisenhower Park	2864 N. Tustin Avenue	ReferenceData/Park
El Camino Park	400 N. Main Street	ReferenceData/Park
El Modena Basin	4343 E. Jordan Avenue	ReferenceData/Park
El Modena Park	555 S. Hewes Street	ReferenceData/Park
Grijalva Park @ Santiago Creek	368 N. Prospect Street	ReferenceData/Park
Handy Park	2143 E. Oakmont Avenue	ReferenceData/Park
Hart Park	701 S. Glassell Street	ReferenceData/Park
Killefer Park	615 N. Lemon Street	ReferenceData/Park
La Veta Park	3705 E. La Veta Avenue	ReferenceData/Park
McPherson Athletic Center	333 S. Prospect Street	ReferenceData/Park
Olive Park	2841 N. Glassell Street	ReferenceData/Park
Pitcher Park	204 S. Cambridge Street	ReferenceData/Park
Plaza Park	Plaza Square	ReferenceData/Park
Santiago Hills Park	8040 E. White Oak Ridge	ReferenceData/Park
Serrano Park	2349 Apache Creek Drive	ReferenceData/Park
Shaffer Park	1930 N. Shaffer Street	ReferenceData/Park
Veterans Memorial at Depot Park	100 N. Atchison Street	ReferenceData/Park
Yorba Park	190 S. Yorba Street	ReferenceData/Park
Santa Fe Depot	186 N. Atchison Street	ReferenceData/Park
Orange Senior Center	170 S. Olive Street	ReferenceData/Park

Table 8b – Parks Assets

PARK	ADDRESS / METRIC	GIS LAYER
Sports Fields	41	Future Layer
Courts (i.e., tennis, basketball, volleyball, etc.)	35	Future Layer
Landscaped areas	Mix of detail / counts	Future Layer
Playgrounds	17	Future Layer



PARK	ADDRESS / METRIC	GIS LAYER
Pools	2	Future Layer
Facilities (i.e., rest rooms, etc.)	70	Future Layer
Parking lots	24	Future Layer
Furniture	Mix of detail / counts	Future Layer
Lights (buildings, sports fields, pathways)	Mix of detail / counts	Future Layer
Medians	Mix of detail / counts	Future Layer
Trees (including tree grates and lifted sidewalks)	Approximately 15,000	Future Layer
Maintenance equipment (i.e., lawn mowers, etc.)	Mix of detail / counts	Future Layer
Recreation equipment	Mix of detail / counts	Future Layer
Irrigation equipment (Controllers, pumps, valves)	Mix of detail / counts	Future Layer
Fences, Walls, Pedestrian Bridges	Mix of detail / counts	Future Layer
Hardscape	Mix of detail / counts	Future Layer
Amenities	1,872	Future Layer

4.7 Streets and Traffic Assets

Table 9, Streets and Traffic, identifies current City of Orange streets and traffic asset classes, including corresponding metric and GIS layer, if any.

Table 9 – Streets and Traffic

ASSET	METRIC	GIS LAYER
Streets	320 miles	ReferenceData/RoadCenterline
Alleys	12.6 miles	ReferenceData/RoadCenterline
Rights-of-Way	TBD	TBD
Pavement Markings	TBD	TBD
On-street Parking Spaces	TBD	TBD
Traffic Signals (installed)	235	FacilitiesStreets/Signalized_Intersection
Traffic Signals (in stock /	TBD	TBD
Street Signs (installed)	TBD	TBD
Street Signs (in stock /	TBD	TBD
Streetlights (installed)	7,870	FacilitiesStreets/Streetlight
Streetlights (in stock / inventory)	TBD	TBD
Curbs and Gutters	627 miles	FacilitiesStreets/StreetCurbType
Edges, Sidewalks	TBD	TBD
Street Furniture (installed)	TBD	TBD
Street Furniture (in stock /	TBD	TBD
Utility Poles (installed)	7,580	FacilitiesStreets/Pole

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



ASSET	METRIC	GIS LAYER
Utility Poles (in stock / inventory)	TBD	TBD
Cabinets / Boxes / Panels	TBD	TBD
Trees	22,000	TBD
Pots / Planters	TBD	TBD
Electric Vehicle Charging	12	TBD
Bicycle Racks and Lockers	30	TBD
Monument Signs	8	TBD
Fiber Conduit	21 miles	FacilitiesStreets/Interconnect_Conduit
Fiber Junction Boxes	TBD	TBD
Pavement	2.4 sq miles	PublicWorks_Engineering/Streets_PMP_2020
Street Light Pedestal	250	FacilitiesStreets/StreetLightPedestal
Radar Feedback Sign	44	FacilitiesStreets/RadarFeedbackSign



5. Current Environment

5.1 Information Technology Organization

The Information Technology Department is managed by the Administrative Services Director as a portion of his overall responsibilities. Since 1984, the City had outsourced its IT program. However, in April 2019, the City Council approved a plan to create its own IT Department comprised of an IT Manager, IT Project Manager, Network Analyst, Systems Analyst, and four (4) IT Specialists. This team will be supplemented by various outside contractors who will provide specialist services to the City of Orange.

5.2 Current City Technology Standards

Table 10, Current City Technology Standards, identifies the City's current technology standards. Proposers will be required to confirm conformance to these requirements or clearly articulate proposed alternatives. The City has standardized its business applications on Microsoft Windows operating system servers and Microsoft SQL databases.

Table 10 – Current City Technology Standards

Technology	Current Standard
Database(s)	Microsoft SQL Server 2014 and 2016
Server OS	Microsoft Windows Server 2012 and 2016
Desktop OS	Windows 10
Server Hardware	Dell PowerEdge r370, Compaq/HP Proliant DL360, and Compaq/HP Proliant DL380
Desktop Hardware	HP Elitedesk and Dell Optiplex
Laptop/Mobile Hardware	Microsoft Surface 7 or higher
Office Productivity	Office 365
Browser	Chrome 84 or higher
Email Server/Client	Microsoft Outlook
Virtual Environment	VMware

5.3 Integrations

The City looks to identify best practices and have the new solution provide required functionality where possible. When not possible, the proposed solution should provide for integration to external systems supporting City requirements. An integration means an automated process where data inputs and outputs are shared within systems. Automated process would mean that there is no manual intervention. Table 11, Required/Desired WAMS Integrations, identifies the integrations that will be required and/or desired with the new work order and asset management system.



Table 11 – Required/Desired WAMS Integrations

Vendor	Product	Purpose
Tyler Technologies	Eden ERP	<ul style="list-style-type: none"> Enterprise financial and human resources/payroll system Transfer employee regular time, overtime and double time pay rates, employee status and current benefit accruals to WAMS for use in calculating the current cost of labor
ESRI	ArcGIS Suite	<ul style="list-style-type: none"> Spatial database of city infrastructure to perform spatial analysis and produce maps and apps for city employees and the public
Laserfiche	Laserfiche	<ul style="list-style-type: none"> Document Management
Syntech Systems	Fuel Master	<ul style="list-style-type: none"> Fuel management system
Cues Inc	GraniteXP	<ul style="list-style-type: none"> Infrastructure inspection (sewer camera) system
Micropaver	MicroPaver	<ul style="list-style-type: none"> Pavement management system
West Coast Arborists	Arbor Access	<ul style="list-style-type: none"> Tree inventory system

5.4 Data Conversion

The City is not currently planning for the conversion of its current and historical data into the new system.



6. Proposal Submission Requirements

6.1 General Instructions

Proposals should be prepared simply, straightforward and provide a concise description of the Proposer's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content. Glossy sales and marketing brochures are not necessary or desired.

Proposals must be organized consistent with the outline provided in this section of the RFP. Proposers must follow all formats and address all portions of the RFP set forth herein providing all information requested. Proposers may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all the City's information requirements.

6.2 Proposal Format

Proposals must be structured, presented, and labeled in the following manner:

- ♦ Cover Letter
- ♦ Table of Contents
- ♦ Section 1 – Executive Summary
- ♦ Section 2 – Company Details
- ♦ Section 3 – Company Qualifications
- ♦ Section 4 – References
- ♦ Section 5 – Proposed Solution
- ♦ Section 6 – Implementation Approach
- ♦ Section 7 – Other Requirements
- ♦ Section 8 – Pricing
- ♦ Section 9 – Software Licensing and Maintenance Agreements

Failure to follow the specified format, to label the responses correctly, or to address all the subsections may, at the City's sole discretion, result in the rejection of the Proposal.

Proposals should be prepared on standard 8 1/2" x 11" paper and printed on two (2) sides. All proposal pages should be numbered.

6.2.1 Cover Letter

All Proposals **must** be accompanied by a cover letter, signed by an individual authorized to bind the proposing entity. **An unsigned Proposal submission shall constitute grounds for rejection.**

The cover letter must include the following information:

- ♦ Proposer's legal name and corporate structure
- ♦ Proposer's primary contact to include name, address, phone, and email

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



- ♦ Identification of use of subcontractors and scope of work to be performed by subcontractors
- ♦ Identification of any pending litigation against the Proposer
- ♦ Disclosure of any bankruptcy or insolvency proceedings in last 10 years
- ♦ Statement of the Proposer's credentials to deliver the services sought under the RFP
- ♦ Statement indicating the proposal remains valid for at least 120 days
- ♦ Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g., employment by the City)
- ♦ Statement of acknowledgement that the City's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the City will assume that the proposer can perform all normal tasks and services without reservation or qualification to the contract
- ♦ Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it

The Proposal Cover Letter should be concise and not exceed two (2) pages unless Proposer's exceptions to the City's legal documents require it.

6.2.2 Table of Contents

All pages are to be numbered, and all figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

6.2.3 Section 1 – Executive Summary

This section of the proposal should provide a brief and concise synopsis of Proposer's proposal and a description of the Proposer's credentials to deliver the services sought under the RFP. The Executive Summary should not exceed three (3) pages.

6.2.4 Section 2 – Company Details

This section of the proposal should identify the following:

- ♦ State the Proposer's official company name and address and the names and titles of its principal officers; indicate what type of entity, such as corporation, partnership, joint venture, sole proprietorship, etc. and indicate if the firm is incorporated
- ♦ Provide the Proposer's Federal Employer I. D. Number
- ♦ Provide the name and address of the person to receive notices who is authorized to make decisions and represents the company. Specify in what capacity the person shall be representing the entity and any limitations to their authority
- ♦ Furnish the Proposer's complete address
- ♦ State any failures or refusals to complete any contracts and a complete explanation
- ♦ Identify any pending litigation against the company, including a parent company or subsidiary, as necessary

**Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services**



- ♦ Disclose any bankruptcy or insolvency proceedings in last 10 years
- ♦ Indicate the number of years in business under the present business name
- ♦ Submit a detailed statement indicating whether the Proposer is totally or partially owned by another business organization or individual that will be providing the services to meet the requirements of the Proposal
- ♦ Submit a detailed statement indicating whether the Proposer totally or partially owns any other business organization that will be providing the services to meet the requirements of the Proposal
- ♦ Statement indicating the proposal remains valid for at least 120 days
- ♦ Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g., employment by the City)
- ♦ Statement of acknowledgement that the City's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the City will assume that the proposer can perform all normal tasks and services without reservation or qualification to the contract
- ♦ Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it

The Background section should not exceed three (3) pages.

6.2.5 Section 3 – Company Qualifications

In this section of the proposal, the Proposer should identify company qualifications and experience in implementing solutions like what the City is seeking:

- ♦ Describe the Proposer's familiarity with work order and asset management systems and associated business processes
- ♦ Indicate the number of years of the company's experience in providing required, equivalent, or related products and services
- ♦ Identify the Proposer's existing client base including the number of existing clients using the version / release of the software being proposed; clearly identify the number of California public agency installations

The Company Qualifications section should not exceed three (3) pages.

6.2.6 Section 4 – References

The Proposer must provide at least five references for similar, completed implementations, with at least three of the references for systems that have been implemented in the last five years.

The City prefers references from California agencies of similar size and complexity to the City.

For each reference, Proposer must provide the following information:

- ♦ Agency name and contact information (i.e. name, title, address, phone, and email)
- ♦ Brief project description, including identifying the software version and modules implemented
- ♦ Number of agency employees

**Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services**



- ◆ Agency general fund budget
- ◆ Implementation timeline and “go-live” date
- ◆ Total Contract Amount
- ◆ Implementation cost

6.2.7 Section 5 – Proposed Solution

In this section of the proposal, the Proposer should identify the proposed solution up to and including the following:

- ◆ Provide a brief solution overview identifying origin of system, release history, current release being proposed, and number of operational installations for the proposed software solution.
- ◆ Describe the modules / software application components proposed to meet the City’s requirements. It is important to note that the level of detail provided will be sufficient to allow the evaluators to understand your product’s features, functions, capabilities, and shortcomings / challenges. Proposers can supplement their response to Section 5 using additional product information as an attachment to their proposal.
- ◆ Complete the Requirements Checklist (Appendix C) provided in Microsoft Word format. This is not a comprehensive list of all the City’s requirements but includes the key requirements that will be used to evaluate the proposals; the Requirements Checklist will be incorporated into the signed contract.

The document should be completed for each line item based on the following criteria:

Response Code	Definition
Y	Proposed solution meets the City requirement with standard functionality available in the current release. Software supports this requirement and can be implemented out of the box or with configuration at no additional cost. No source code modification is required.
N	Proposed solution does not meet requirement. Substantial system modification would be required to meet requirement.
W/C	Workaround / Customization proposed to meet requirement. Functional workaround or system customization / modification would be required to meet requirement.
T	Available with 3rd party software application. <i>Indicate name of the application recommended and number of installs jointly completed.</i>

Proposers must provide a Response Code and Response/Comment for every Requirement. The Response/Comment should include a brief explanation of how the item is supported; where specific information is identified to be included (italicized in the above table), that information must be provided as well. If a submitted RFP includes blank responses, the document may be considered non-responsive and may be rejected.



- ♦ Identify any additional functionality or recommended modules or services that were not identified in RFP Section 1.1 but that the Proposer recommends that the City consider. Include a description of the features and functions of each additional proposed module.
- ♦ Describe alternative service delivery models (i.e. Software-as-a-Service/Hosted Off-Premises, Hosted/On-Premises, etc.) available to the City and indicate how these might impact the proposed solution.
- ♦ Confirm ability to conform to the requirements in RFP Section 5.2 Current City Technology Standards (Table 10) or clearly articulate proposed alternatives.
- ♦ RFP Section 5.2 Integrations (Table 11) documents the current and future required/desired WAMS integrations at the City. As part of the Requirements Checklist (Appendix C), Proposer must provide adequate descriptions regarding how the Proposer will address these items in the proposed solution.

6.2.8 Section 6 – Implementation Approach and Work Plan

The Proposer should identify the proposed implementation approach, clearly identifying each phase, the timeline proposed, roles and responsibilities to be performed by the Proposer and those to be performed by the City. The Proposer response should clearly indicate the City resource requirements to meet the vendor proposed schedule.

- ♦ Describe your implementation and project management methodology and approach to ensure a successful implementation.
- ♦ Provide a project organization chart highlighting the key staff who will be assigned to the project. Provide biographies for the project manager and other key assigned resources.
- ♦ Provide a detailed work plan that identifies major activities, tasks, deliverables, and resources so that the City can clearly understand what the additional phases would include and the timeline for their completion.
- ♦ Describe the roles and responsibilities of the City staff during implementation, and provide an estimated number of City resources, expected role and level of effort during each phase of the project.
- ♦ Describe your training methodology and training documentation and how you ensure users are prepared to use the proposed solution.

6.2.9 Section 7 – Other Requirements

In this section of the proposal, the Proposers should address the following items in a concise manner:

- ♦ Describe ongoing maintenance, release / upgrade, and support services. At a minimum, Proposers should address the following items:
 - Help desk processes and procedures
 - Hours of support (stated in Pacific Time)
 - Escalation procedures
 - Response time commitments
- ♦ Identify if there are solution user groups and / or user conferences

**Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services**



- ♦ Provide hardware and database specifications for the proposed solution. As part of Proposer's response, confirm your acceptance of the City's technical standards.
- ♦ Describe the frequency that application patches and releases have been made available within the past two years. In addition, clearly identify the roles and responsibilities of the City to complete updates.

6.2.10 Section 8 – Pricing

The City seeks a clear and comprehensive understanding of all costs associated with the proposed solution, implementation, and ongoing maintenance of the proposed system. In this section, the Proposer must itemize all costs associated with the implementation and ongoing maintenance. The City will evaluate proposals based on the "Total Cost to Implement (TCI)" and the "Total Cost to Operate (TCO)". TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus the initial five years of annual maintenance fees.

The Proposer's price proposal must identify and consist of all costs required to complete a successful implementation to include:

- ♦ Solution Pricing Local
 - Software Licensing and Maintenance Costs
- ♦ Solution Pricing Hosted
 - Software Hosting Costs
- ♦ Implementation Services
 - Software Installation and Configuration
 - Project Management
 - Business Process Review
 - Training
 - Documentation
 - Change Management
- ♦ Integration Services
- ♦ 3rd party products required / recommended for proposed solution (i.e. software, hardware)
- ♦ Optional Offerings
- ♦ Consultant travel, and other expenses not included
- ♦ Professional Services Rates

The City intends to purchase any required hardware and database software independently based on recommended standards provided by the Proposer if required for proposed solution.

In Appendix D, the City has provided Proposers an electronic (Microsoft Excel) Vendor Cost Worksheet **that must be completely filled out** and included in Proposer's response under separate cover; an electronic copy of the file in native format (NOT PDF) must be provided with other electronic copies of the proposal documents. The City will evaluate Proposer price proposals based solely on the information provided in the pricing templates. The templates

Request for Proposals No. 20-21.15
Work Order and Asset Management System (WAMS)
Including Implementation Services



provide space for Proposers to identify any assumptions or comments that will ensure the City understands what is being proposed.

The Proposer's response to the Pricing section must include the following components:

- ♦ On Premise Solution Pricing – This section of the pricing proposal should clearly identify the proposed software modules that are required to meet the RFP requirements. Proposers are strongly encouraged to provide a detailed breakout of software module pricing in order to help the City assess the cost of the proposed solution. Proposers must identify the number of user licenses being proposed for each module and clearly describe the basis for software licensing and the method to justify number of licenses being proposed.
- ♦ Hosted Solution Pricing – This section of the pricing proposal is provided for those that wish to provide the City with a Hosted system. Costs should clearly identify the proposed software modules that are required to meet the RFP requirements. Proposers are strongly encouraged to provide a detailed breakout of software module hosting costs in order to help the City assess the cost of the proposed solution. Proposers must identify the number of user licenses being proposed for each module and clearly describe the basis for software licensing and the method to justify number of licenses being proposed.
- ♦ Implementation Services – This section of the pricing proposal should clearly identify the quantity, hourly rate, and total cost for all professional services the Proposer will provide to ensure a successful implementation. Proposers are encouraged to provide a breakdown of the service categories that will be provided to support the implementation to allow evaluators to understand the level of effort, resources, and cost of services.
- ♦ Integrations – This section of the pricing proposal should clearly identify all costs associated with providing integrations, exports, and imports of data with other systems if not defined as part of the proposed solution.
- ♦ 3rd Party Products – This section of the pricing proposal should clearly identify any third-party software and / or specialty hardware that will be required to fully implement the proposed solution to meet the RFP requirements.
- ♦ Optional Offerings – This section of the pricing proposal should identify any optional product or service offerings the Proposer would like the City to consider. The City is interested in understanding and evaluating other products and services of the Proposers. If Proposers believe they have additional products and services that may be of interest to the City, please itemize that information in the Optional Offerings Price Sheet.
- ♦ Travel – This section of the pricing proposal should clearly identify the projected travel costs associated with Proposer's implementation services. The proposer should identify the anticipated number of trips, days of service per trip, and estimated per trip cost. The City will reimburse the selected Proposer based on actual trip expenses supported by receipts and documentation.
- ♦ Professional Services Rate Price Sheet – The City seeks hourly pricing for additional services that may be required during the implementation. Proposers should provide an hourly rate for any professional services categories offered as part of the proposal. If necessary, the City will use these rates to purchase additional services.



6.2.11 Section 9 – Software Licensing and Maintenance Agreements

In this section, the Proposer must provide any software licensing and maintenance agreements that will be required to implement the Proposer's solution.



7. Proposal Evaluation

An Evaluation Committee will review all proposals to determine which Proposers qualify for consideration. The evaluation will include at least an initial review and a detailed review. The initial review will evaluate all submissions for conformance to stated specifications to eliminate all responses that deviate substantially from the basic intent and/or fail to satisfy the mandatory requirements. Only those proposals that meet or exceed the intent of the mandatory requirements will be further evaluated.

Scoring of responses to this proposal will be completed according to the following scale:

- ♦ **Technical Qualifications 30%:** Vendor's ability to provide qualified, responsible, responsive, and available staff members throughout the contract term.
- ♦ **Responsiveness to RFP 30%:** Completeness of submitted documents and willingness to accept terms and conditions of the Agreement.
- ♦ **Company Profile and References 30%:** Vendor's related experience in successfully delivering similar solutions and related services to cities of comparable size and complexity. Vendor's company profile including financial stability, longevity, organizational structure, and account team members.
- ♦ **Fee Schedule 10%:** Total cost of all software license or hosting, all 3rd party costs, and all professional service fees, including travel costs and other miscellaneous costs.

The City reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the City and, if held, shall be after initial evaluation of proposals is complete. If clarifications are required because of such discussions, the Proposer shall provide such clarifications in writing.

The highest rated Proposers evaluated by the Committee may be invited to make an oral presentation of their written proposal to the Committee. (Given the ongoing health pandemic and restrictions against large gatherings, it may be necessary that an oral presentation may be scheduled via a web-based platform.) In the event that only one submitted proposal is fully qualified, then a contract may be negotiated and awarded to that Proposer. The Committee will make a final recommendation to the City Council which will, in turn, officially act on that recommendation.



8. General Requirements

8.1 Collusion

By submitting a response to the RFP, each Proposer represents and warrants that its response is genuine and made in the interest of or on behalf of any person not named therein; that the Proposer has not directly induced or solicited any other person to submit a sham response or any other person to refrain from submitting a response; and that the Proposer has not in any manner sought collusion to secure any improper advantage over any other person submitting a response.

8.2 Gratuities

No person will offer, give, or agree to give any City employee or its representatives any gratuity, discount or offer of employment in connection with the award of contract by the City. No City employee or its representatives will solicit, demand, accept or agree to accept from any other person a gratuity, discount or offer of employment in connection with a City contract.

8.3 Required Review and Waiver of Objections by Proposers

Proposers should carefully review this RFP and all attachments, including but not limited to the Standard Professional Services Agreement, for comments, questions, defects, objections, or any other matter requiring clarification or correction. Comments concerning RFP objections must be made in writing and received by the City no later than the "Deadline for Proposer Questions" identified in Table 1 – RFP Schedule of Events. This will allow issuance of any necessary amendments and help prevent the opening of defective proposals upon which contract award could not be made.

Protests based on any objection will be considered waived and invalid if these faults have not been brought to the attention of the City, in writing, by the Deadline for Written Questions and Comments.

8.4 Nondiscrimination

No person will be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the City's contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or California State Constitutional or statutory law; nor will they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the City or in the employment practices of the City's contractors. Accordingly, all Proposers entering into contracts with the City will, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.



8.5 Proposal Withdrawal

To withdraw a proposal, the Proposer must submit a written request, signed by an authorized representative of your company, to the Purchasing Officer at the address provided in Section 1.5. After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time up to the deadline for submitting proposals.

8.6 Proposal Errors

Proposers are liable for all errors or omissions contained in their proposals. Proposers will not be allowed to alter proposal documents after the deadline for submitting a proposal.

8.7 Incorrect Proposal Information

If the City determines that a Proposer has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the Proposer knew or should have known was materially incorrect, that proposal will be determined non-responsive, and the proposal may be rejected.

8.8 Prohibition of Proposer Terms and Conditions

A Proposer may not submit the Proposer's own contract terms and conditions in a response to this RFP. If a proposal contains such terms and conditions, the City, at its sole discretion, may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

8.9 Assignment and Subcontracting

The Contractor may not subcontract, transfer, or assign any portion of the contract without prior written approval from the City. Each subcontractor must be approved in writing by the City. The substitution of one subcontractor for another may be made only at the discretion of the City and with prior, written approval from the City.

Notwithstanding the use of approved subcontractors, the Proposer, if awarded a contract under this RFP, will be the prime contractor and will be responsible for all work performed and will be responsible for all costs to subcontractors for services provided by the Proposer.

8.10 Right to Refuse Personnel

The City reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors. The City reserves the right to interview and approve all Proposers' staff.

8.11 Proposal of Additional Services

If a Proposer indicates an offer of services in addition to those required by and described in this RFP, these additional services may be added to the contract before contract signing at the sole discretion of the City.



8.12 Licensure

A City business license is required prior to commencing work.

8.13 Conflict of Interest and Proposal Restrictions

By submitting a response to the RFP, the Proposer certifies that no amount will be paid directly or indirectly to an employee or official of the City as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP will be construed to prohibit another governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

Any individual, company, or other entity involved in assisting the City in the development, formulation, or drafting of this RFP or its scope of services will be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

8.14 Contract Negotiations

After a review of the proposals and completion of the demonstration and POC, the City intends to enter into contract negotiations with the selected Proposer. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the City will open negotiations with the next ranked service provider.

8.15 Execution of Contract

If the selected Proposer does not execute a contract with the City within fifteen (15) business days after notification of selection, the City may give notice to that service provider of the City's intent to select from the remaining Proposers or to call for new proposals, whichever the City deems appropriate.

8.16 Right of Rejection

The City reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety.

Any proposal received which does not meet the requirements of this RFP may be considered nonresponsive, and the proposal may be rejected. Proposers must comply with all of the terms of this RFP and all applicable State laws and regulations. The City may reject any proposal that does not comply with all the terms, conditions, and performance requirements of this RFP.

Proposers may not restrict the rights of the City or otherwise qualify their proposals. If a Proposer does so, the City may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

The City reserves the right, at its sole discretion, to waive variances in technical proposals provided such action is in the best interest of the City. Where the City waives minor variances



in proposals, such waiver does not modify the RFP requirements or excuse the Proposer from full compliance with the RFP. Notwithstanding any minor variance, the City may hold any Proposer to strict compliance with the RFP.

8.17 Disclosure of Proposal Contents

All proposals and other materials submitted in response to this RFP procurement process become the property of the City. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process. Upon the completion of the evaluation of proposals, the proposals and associated materials will be open for review by the public to the extent allowed by the California Public Records Act, (Government Code § 6250-6270 and 6275-6276.48). By submitting a proposal, the Proposer acknowledges and accepts that the contents of the proposal and associated documents will become open to public inspection.

8.18 Proprietary Information

The master copy of each proposal will be retained for official files and will become public record after the award of a contract unless the proposal or specific parts of the proposal can be shown to be exempt by law (Government code §6276). Each Proposer may clearly label part of a proposal as "CONFIDENTIAL" if the Proposer thereby agrees to indemnify and defend the City for honoring such a designation. The failure to so label any information that is released by the City will constitute a complete waiver of all claims for damages caused by any release of the information. If a public records request for labeled information is received by the City, the City will notify the Proposer of the request and delay access to the material until seven working days after notification to the Proposer. Within that time delay, it will be the duty of the Proposer to act in protection of its labeled information. Failure to so act will constitute a complete waiver.

8.19 Severability

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of the City and Proposers will be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

8.20 RFP and Proposal Incorporated into Final Contract

This RFP and the successful proposal will be incorporated into the final contract.

8.21 Proposal Amendment

The City will not accept any amendments, revisions, or alterations to proposals after the deadline for proposal submittal unless such is formally requested, in writing, by the City.



8.22 Consultant Participation

The City reserves the right to share with any consultant of its choosing this RFP and proposal responses in order to secure a second opinion. The City may also invite a consultant to participate in the Proposal Evaluation process.

8.23 Warranty

The selected software proposer will warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP, demonstrated in both the software demonstration and subsequent proof-of-capabilities. Further, those requirements as stated in this RFP will become part of the selected software proposer's license and the software proposer will warrant to the requirements. The selected proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all application modules included in the implementation.

8.24 Rights of the City

The City reserves the right to:

- ♦ Make the selection based on its sole discretion
- ♦ Reject any and all proposals
- ♦ Issue subsequent Requests for Proposals
- ♦ Postpone opening proposals, if necessary, for any reason
- ♦ Remedy errors in the Request for Proposal process
- ♦ Approve or disapprove the use of particular subcontractors
- ♦ Negotiate with any, all, or none of the Proposers
- ♦ Accept other than the lowest offer
- ♦ Waive informalities and irregularities in the proposals
- ♦ Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the City

An agreement will not be binding or valid with the City unless and until it is approved by the City Council and executed by authorized representatives of the City and of the Proposer.

Appendix A – Standard Terms and Conditions

CITY OF ORANGE

CONTRACT - GENERAL CONDITIONS

1. Acceptance of the Proposer's offer contained in this Contract is expressly limited to the terms and conditions of such offer as herein stated.
2. No charges for taxes, transportation, boxing, packaging, crating or returnable containers will be allowed and paid by the City unless separately stated hereon. All sales, use, excise or similar taxes to be paid by the City must be itemized separately hereon and on invoices.
3. The City's obligation to pay the sum herein stated for any one fiscal year shall be contingent upon the City Council of the City appropriating the necessary funds for such payment by the City in each fiscal year during the term of this Contract. For the purposes of this paragraph a fiscal year commences on July 1 of the year and continues through June 30 of the following year. In the event that the City Council of the City fails to appropriate the necessary funds for any fiscal year, then, and in that event, the Contract will terminate at no additional cost or obligation to the City.
4. The Contractor shall deliver the materials, equipment, supplies or services, or cause the work to be performed, within the time and in the manner specified in the Contract. Times and dates stated herein are of the essence. If at any time the Contractor has reason to believe that deliveries will not be made as scheduled, written notice setting forth the cause of the anticipated delay shall be given immediately to the City. Freight charges must be prepaid. C.O.D. shipments will not be accepted.
5. The City reserves the right at any time to make changes in drawings and specifications, in methods of shipment and packaging and in place of delivery as to any articles covered by this Contract. In such event there will be made an equitable adjustment in price and time of performance mutually satisfactory to the Contractor and the City; but any claim by the Contractor for such an adjustment must be made within thirty days of such change.
6. The contractor warrants that the goods, machinery, or equipment delivered or the work performed hereunder shall conform to the specifications, drawings, samples or other description specified by the City and shall be fit and sufficient for the purpose intended, merchantable, of good material and workmanship, in good working order and free from defect or faulty workmanship for a period of one year. When defective goods, machinery, or equipment or faulty workmanship is discovered which requires repair or replacement pursuant to this warranty, the Contractor shall provide all labor, materials, parts and equipment to correct such defect at no expense to the City.

7. The Contractor shall defend, indemnify and hold the City, its officials and employees harmless from any and all loss, damage, liability demands, claims, causes of action, costs and expenses (including reasonable attorneys' fees) for injuries to persons (including death) or damage or destruction of property connected with or arising from the negligent acts or omissions of the Contractor, its agents or employees in the performance of this Contract.
8. The City reserves the right to terminate this Contract at any time in whole or in part even though the Contractor is not in default hereunder. In such event there will be made an equitable adjustment of the terms that is mutually satisfactory to the City and the Contractor. Upon receipt of any notice of such termination, the Contractor shall, unless such notice otherwise directs, immediately discontinue all work on the Contract and deliver, if and as directed, to the City all completed and partially completed articles, work in process and materials purchased or acquired for performance of the Contract. The provisions of this paragraph shall not limit or affect the right of the City to terminate this Contract immediately upon written notice of breach. In the event of termination, the bonds shall remain in effect for six (6) months after the date of termination to provide surety that any remedial work required at the time of termination will be completed, and that any vendors or laborers will be paid.
9. The City reserves the right to cancel this Contract or any part thereof and reject delivery of goods if delivery is not undertaken and completed when specified and in accordance with specifications. The Contractor shall be charged for any direct losses, but not any consequential damages, sustained by the City by reason of such delay or failure, excepting losses caused by a delay for reason beyond the Contractor's reasonable control. Direct losses shall include but not be limited to any costs to the City in excess of the contract price of obtaining goods from other sources similar to those canceled or rejected hereunder.
10. The City shall pay to the Contractor the price or prices specified in the Contract on delivery of the materials, equipment, supplies, or services and acceptance thereof by the City Manager or his designee, or upon completion of the work to be performed and accepted thereof, as specified in the Contract. Defective articles or articles not in accordance with the City's specifications shall be held for the Contractor's instructions at the Contractor's risk, and if the Contractor so directs will be returned at the Contractor's expense.
11. No return or exchange of material, equipment or supplies shall be permitted without written approval of the City Purchasing Officer.
12. All royalties for patents, or charges for the use of patents, which may be involved in any article to be furnished under this Contract shall be included in the Contract price.
13. In cases where a price subject to escalation has been agreed upon, all claims for such price escalation must be received by the City within 60 days after date of final shipment. The price escalation shall be shown as a separate item on the invoice. Unless an escalator clause has been shown as a specific part of this Contract the Contractor shall not be entitled to reimbursement for costs incurred due to escalation.

14. All materials, supplies and equipment provided under this Contract shall be in full compliance with the Safety Orders and Regulations of the Division of Industrial Safety of the State of California, Title 8, California Administrative Code (CAL/OSHA) and all applicable OSHA regulations as well as all other applicable California Administrative Codes. The Contractor agrees to indemnify and hold the City, its officials, and employees harmless for, of and from any loss, including but not limited to fines, penalties and corrective measures, the City may sustain by reason of the Contractor's failure to comply with said laws, rules and regulations in connection with the performance of this contract.
15. The Contractor shall keep confidential and not disclose to others or use in any way to the detriment of the City or any other party, confidential business or technical information that the City may disclose in conjunction with this Contract or the Contractor may learn as a result of entering City property to deliver goods, machinery or equipment or to perform Work hereunder.
16. This Contract shall not be assigned in whole or in part, nor any duties delegated without the City's prior written approval.
17. The remedies herein reserved shall be cumulative and additional to any other remedies at law or in equity. The City's failure to object to provisions contained in any communication from the Contractor shall not be deemed an acceptance of such provisions or a waiver of the provisions of this Contract. No waiver of any of City's rights or remedies hereunder shall be deemed made unless done expressly in writing. The waiver of any breach of this Contract shall not be held to be a waiver of any other or subsequent breach.
18. This Contract shall not be amended, modified or rescinded, except by written agreement signed by the parties and expressly referring to this Contract.
19. Any indebtedness of the Contractor to the City may at the City's option be credited against amounts owing by the City hereunder.
20. The Contractor shall indemnify, hold harmless and defend the City, its officials and employees from any damage, loss, cost, liability, cause of action or expense, whether or not reduced to judgment, including reasonable attorney's fees, arising from any infringement or claimed infringement of any patent, trademark, copyright, or any other proprietary right or misappropriation of confidential information or trade secrets of any third party and based on the manufacture, sale or use of goods, machinery, or equipment supplied hereunder, and/or on the provision of any services hereunder.
21. The Contractor shall furnish further itemization and breakdown of the Contract price when requested by the City.
22. The Contractor, in the performance of any work or the furnishing of any labor under this Contract, shall be considered as an independent Contractor. The Contractor, his agents, subcontractors and employees, shall not be considered as employees of the City. Contractor shall be solely responsible for any and all withholding of income taxes, payment of unemployment insurance and other duties of an employee under state and federal law, and hereby indemnifies, defends and holds City harmless from any and all liabilities arriving from or related to any such duty.

23. **NON-DISCRIMINATION**

In the performance of any Contract awarded pursuant to these specifications, the Contractor shall not discriminate against any employee or applicant for employment because of age, sex, marital status, physical handicap, race, color, religion, ancestry, or national origin. Contractor will take affirmative action to ensure the applicants are employed, and that employees are treated during employment without regard to their age, sex, marital status, physical handicap, race, color, religion, ancestry or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Contractor shall post in conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this fair Employment Practices paragraph.

24. The Contractor shall comply with all applicable federal, state and local laws pertaining to the subject matter hereof or in any way regulating the activities undertaken by Contractor or any subcontractor hereunder.

25. If at any time during the progress of the Work, the Contractor shall allow any indebtedness to accrue for labor, equipment, or materials, or which may become a claim, lien, or stop notice right against the City, the Contractor shall immediately upon request from the City pay such claim or indebtedness or cause such lien of stop notice to be dissolved and discharged by giving a bond or otherwise and, in case of his failure so to do, the City may withhold any money due the Contractor until such claim or indebtedness is paid or may apply such money toward the discharge thereof; or in such event the City may, at its option, declare this Contract to be terminated, take possession and control of the Work, and complete the same or cause the same to be completed according to the specifications. Contractor shall pay to City the difference between the Contract price and the actual cost to the City in completing or causing the Work to be completed.

26. The Contractor shall carry on the Work at his own risk until the same is fully completed and accepted and shall, in case of any accident, destruction or injury to the Work or materials before its final completion and acceptance, repair or replace the Work or materials so injured, damaged and destroyed, at his own expense and to the satisfaction of the City. When materials and equipment are furnished by others for installation or erection by the Contractor, the Contractor shall receive, unload, store and handle same at Site and become responsible therefore as though such materials and equipment were being furnished by the Contractor under the Contract.

27. **(Public Projects insurance requirements do not apply to this bid.)**

Contractor shall procure and maintain at Contractor's expense for the duration of the Contract the following insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Contract by the Contractor, his agents, representatives, employees or subcontractors.

- (a) Comprehensive General Liability: \$1,000,000 combined single limit for each occurrence or \$2,000,000 General Aggregate for products and completed operations coverage.

The City, its officials, employees and volunteers shall be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of the Contractor; products and completed operations of the Contractor; premises owned, leased or used by the Contractor.

- (b) Automobile Liability: \$1,000,000 combined single limit per accident for bodily injury and property damage covering owned, non-owned and hired vehicles.
- (c) Workers' Compensation as required by the Labor Code of the State of California and Employers Liability limits of \$1,000,000 per accident.
- (d) Insurance as specified in the Proposal Requirements

Any self-insurance program and self-insured retention must be separately approved in writing by the City.

Each insurance policy shall be endorsed to state that coverage shall not be canceled by either party or reduced in coverage except after thirty (30) days' prior written notice to the City.

Acceptable insurance coverage shall be placed with carriers admitted to write insurance in California or carriers with a rating of an equivalent to A:VIII by A.M. Best & Company. Any deviations from this rule shall require written approval from the City Attorney.

All coverages for subcontractors shall be subject to the requirements stated herein and shall be maintained at no expense to the City.

Contractor shall furnish the City with certificates of insurance and original endorsements providing coverage as required above in form and substance acceptable to the City Attorney. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf.

Before any of the Contractor's or its Subcontractor's employees shall do any work upon the City's premises, the Contractor shall furnish the City with the required certificates in triplicate evidencing that such insurance has been provided and that such insurance is being carried and maintained. Such certificates shall specify the date when such insurance expires. The contractor agrees that such insurance shall be provided and such insurance carried and maintained until after the Work under the Contract has been completed and accepted.

Such insurance as required herein or in any other documents to be considered a part hereof shall not be deemed to limit the Contractor's liability under this Contract.

28. The Contractor shall defend, indemnify and hold harmless the City, its officials and employees from and against any liability for claims for bodily injury and property damage arising out of Contractor's acts, omissions, or errors or those of any employee or Subcontractor of the Contractor or any Subcontractor at the Site.
29. Contractor shall list the name and location of the place of business of each subcontractor who will perform work or labor, or render service to the Contractor, or who, under subcontract to the Contractor, specially fabricates and installs a portion of the work or improvement in an amount in excess of one-half of one percent of the Contractor's total bid or ten thousand dollars (\$10,000), whichever is greater. The subcontractor list shall be submitted with the Contractor's bid proposal.

The Proposer shall check Box A or, as the case may be. If the Proposer does not check either box, it will be deemed that he has checked Box A.

- A. ☐ The undersigned **DOES NOT INTEND** to subcontract any portion of this project.
- B. ☐ The undersigned **INTENDS** to subcontract a portion of this project to the following subcontractors. (Note: Refer to Section 2.3 of Standard Specifications and Sections 4100 through 4113 of the Government Code for the portion of work for which **SUBCONTRACTOR DISCLOSURE IS REQUIRED** with the proposal.)

Name of Subcontractor	Location of Office	Portion of Work to be	Subcontracted

Appendix B – Insurance Requirements

a. Contractor shall carry workers' compensation insurance as required by law for the protection of its employees during the progress of the work. Contractor understands that it is an independent contractor and not entitled to any workers' compensation benefits under any City program.

b. Contractor shall maintain during the life of this Agreement the following minimum amount of comprehensive general liability insurance or commercial general liability insurance: the greater of (1) One Million Dollars (\$1,000,000) per occurrence; or (2) all the insurance coverage and/or limits carried by or available to Contractor. Said insurance shall cover bodily injury, death and property damage and be written on an occurrence basis.

c. Contractor shall maintain during the life of this Agreement, the following minimum amount of automotive liability insurance: the greater of (1) a combined single limit of One Million Dollars (\$1,000,000); or (2) all the insurance coverage and/or limits carried by or available to Contractor. Said insurance shall cover bodily injury, death and property damage for all owned, non-owned and hired vehicles and be written on an occurrence basis.

d. Any insurance proceeds in excess of or broader than the minimum required coverage and/or minimum required limits which are applicable to a given loss shall be available to City. No representation is made that the minimum insurance requirements of this Agreement are sufficient to cover the obligations of Contractor under this Agreement.

e. Each policy of general liability and automotive liability shall provide that City, its officers, officials, agents, and employees are declared to be additional insureds under the terms of the policy, but only with respect to the work performed by Contractor under this Agreement. A policy endorsement to that effect shall be provided to City along with the certificate of insurance. In lieu of an endorsement, City will accept a copy of the policy(ies) which evidences that City is an additional insured as a contracting party. The minimum coverage required by Subsection 18.b and c, above, shall apply to City as an additional insured.

f. Contractor shall maintain during the life of this Agreement professional liability insurance covering errors and omissions arising out of the performance of this Agreement with a minimum limit of One Million Dollars (\$1,000,000) per claim. Contractor agrees to keep such policy in force and effect for at least five (5) years from the date of completion of this Agreement.

g. The insurance policies maintained by Contractor shall be primary insurance and no insurance held or owned by City shall be called upon to cover any

loss under the policy. Contractor will determine its own needs in procurement of insurance to cover liabilities other than as stated above.

h. Before Contractor performs any work or prepares or delivers any materials, Contractor shall furnish certificates of insurance and endorsements, as required by City, evidencing the aforementioned minimum insurance coverages on forms acceptable to City, which shall provide that the insurance in force will not be canceled or allowed to lapse without at least ten (10) days' prior written notice to City.

i. Except for professional liability insurance coverage that may be required by this Agreement, all insurance maintained by Contractor shall be issued by companies admitted to conduct the pertinent line of insurance business in California and having a rating of Grade A or better and Class VII or better by the latest edition of Best Key Rating Guide. In the case of professional liability insurance coverage, such coverage shall be issued by companies either licensed or admitted to conduct business in California so long as such insurer possesses the aforementioned Best rating.

j. Contractor shall immediately notify City if any required insurance lapses or is otherwise modified and cease performance of this Agreement unless otherwise directed by City. In such a case, City may procure insurance or self-insure the risk and charge Contractor for such costs and any and all damages resulting therefrom, by way of set-off from any sums owed Contractor.

k. Contractor agrees that in the event of loss due to any of the perils for which it has agreed to provide insurance, Contractor shall look solely to its insurance for recovery. Contractor hereby grants to City, on behalf of any insurer providing insurance to either Contractor or City with respect to the services of Contractor herein, a waiver of any right to subrogation which any such insurer may acquire against City by virtue of the payment of any loss under such insurance.

l. Contractor shall include all subcontractors, if any, as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor to City for review and approval. All coverages for subcontractors shall be subject to all of the requirements stated herein.

Appendix C – Requirements Checklist

The Proposer must complete the Work Order and Asset Management System Requirements Checklist provided in the electronic Microsoft Word **file format that will be provided separately on the City's website** (<https://www.cityoforange.org/Bids.aspx?CatID=17>); a **fifty-page** sample is included in this RFP; the completed Checklist must be submitted with the Proposal.

City of Orange

Work Order and Asset Management System

Requirements Checklist

City of Orange Public Works seeks a proven, fully integrated WAMS public sector solution. It is seeking to modify existing business processes to accommodate best practices and will be looking to select a system that drives the implementation of best practices.

As stated in RFP Section 6.2.7, the Proposer must use this document to respond to the WAMS requirements included herein. Proposers are to respond to each requirement with one of the following response codes:

- Y – Meets Requirement
- N – Does Not Meet Requirement
- W/C – Workaround Proposed or Customization to Meet Requirement
- T – Third-Party Solution to Meet Requirement

Response Codes “Y” and “N” do not require written responses unless the proposers wish to present additional benefits or opportunities related to their solution and the requirement. However, response codes “W/C” and “T” do require written responses. For these response codes, Proposers must describe how the requirement will be met.

Proposers are to respond with a single option and must provide a written response to each requirement coded with W/C. It is important to note that the level of detail must be sufficient to allow the evaluators to understand your product’s features, functions, capabilities, and shortcomings / challenges. Proposers may supplement their response using additional product information as an attachment to their proposal. However, at a minimum, Proposers must provide a written summary response at the module level such that the evaluators can obtain an adequate understanding of how the proposed solution will meet City’s needs. Proposers are encouraged that additional provided materials are clear and specific such that the evaluators can easily find the material and detail referenced.

If option W/C is selected, please provide additional costs, detail, and schedule impact, if applicable.

Proposers are to respond with a single option and MUST provide a narrative for each item with W/C selected. Proposers are required to fully complete this table and include in their proposals.

Contents

1.	GENERAL REQUIREMENTS	4
1.1.	General.....	4
1.2.	Asset Management.....	4
1.3.	Service Requests	8
1.4.	Work Orders	10
1.5.	GIS	15
1.6.	Preventative Maintenance	17
1.7.	Inventory Management	19
1.8.	User Interface	21
1.9.	Reporting and Analysis	22
2.	DEPARTMENT CORE REQUIREMENTS.....	26
2.1.	Public Works - Water	26
2.2.	Public Works – Street Maintenance	28
2.3.	Public Works – Fleet Operations	29
2.4.	Public Works – City Facility Operations	31
2.5.	Public Works - Traffic	32
2.6.	Community Services – Parks	34
2.7.	Community Services – Recreation	37
3.	TECHNICAL REQUIREMENTS.....	38
3.1.	Maintenance and Support.....	38
3.2.	Environment	41
3.3.	Audit and Security.....	42
3.4.	Mobility.....	44

3.5.	<i>Interoperability / System Interfaces.....</i>	<i>45</i>
3.6.	<i>Professional Services.....</i>	<i>47</i>

1. GENERAL REQUIREMENTS

1.1. General

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
1.1.1	Ability to allow users to create user-defined system codes that appear throughout the system, including code, description, activation date, and expiration date. Once added or modified, all codes and their description must be accessible via conveniently accessed pop-up or pull-down menus	Choose an item.	Click or tap here to enter text.
1.1.2	Ability to store and forward data if no network connectivity is available when editing the features that make up the water distribution pipe network (applicable to entire WAMS)	Choose an item.	Click or tap here to enter text.
1.1.3	Ability to create user-defined data fields. User-defined fields must be available for every inventory type (Street, Signs, Street Markings, etc.)	Choose an item.	Click or tap here to enter text.
1.1.4	Ability to track lease administration including lease term, tenant, cost	Choose an item.	Click or tap here to enter text.

1.2. Asset Management

The solution should provide integrated asset management functionality listed below.

#	Requirement	Response Code	Response/Comments
1.2.1	Ability to allow users to create user-defined fields to meet their specific needs, for example: <ul style="list-style-type: none"> Account Number Address Area Building 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> Facility Type Maintenance Type Priority Problem Project Tool 		
1.2.2	Ability to maintain a history of all activities, including labor, part, and equipment costs that have been performed on a particular equipment unit	Choose an item.	Click or tap here to enter text.
1.2.3	Ability to provide alerts to specific to assets, such as confined spaces (which trigger permissions, special equipment usage and procedures)	Choose an item.	Click or tap here to enter text.
1.2.4	Ability to provide a complete, life-to-date history, listed in chronological order, of all activities performed on the asset, sortable and filterable by activity type	Choose an item.	Click or tap here to enter text.
1.2.5	Ability to store, access, and display asset images (PDF, DWG, JPG, XLSX, DOCX), including moving video (AVI, MPEG, etc.) images. Also, the ability to link to these documents in the City's DMS system	Choose an item.	Click or tap here to enter text.
1.2.6	Ability to track licenses/certifications for users of each type of asset/equipment and prompt renewal or expiration notices	Choose an item.	Click or tap here to enter text.
1.2.7	Ability to provide a complete inventory of all equipment used during a maintenance activity	Choose an item.	Click or tap here to enter text.
1.2.8	Ability to allow for a flexible naming scheme for inventoried assets	Choose an item.	Click or tap here to enter text.
1.2.9	Ability to record multiple labor costs, by job class including hourly rate type (i.e. regular, overtime, double time, holiday time, etc.) number of hours, and extended (i.e. calculated) costs	Choose an item.	Click or tap here to enter text.
1.2.10	Ability to schedule an unlimited number of activities for each asset	Choose an item.	Click or tap here to enter text.
1.2.11	Ability to look at past repair history of an asset by: <ul style="list-style-type: none"> Life to Date Year to Date Quarter to Date Month to Date 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> By open work orders 		
1.2.12	Ability to assign GPS coordinates to each asset	Choose an item.	Click or tap here to enter text.
1.2.13	Ability to track warranties by user-defined criteria	Choose an item.	Click or tap here to enter text.
1.2.14	Ability to track all work activities performed in a specific location or within a specific area	Choose an item.	Click or tap here to enter text.
1.2.15	Ability for inquiry into: <ul style="list-style-type: none"> Asset PM records/schedules PM assignments Asset service/repair histories Warranty claim history 	Choose an item.	Click or tap here to enter text.
1.2.16	Ability to record and maintain equipment acquisition data	Choose an item.	Click or tap here to enter text.
1.2.17	Ability to allow equipment be assigned unique identifiers	Choose an item.	Click or tap here to enter text.
1.2.18	Ability to review of repair and associated operating costs on equipment and components for any series of months, quarters, years, and life cycle	Choose an item.	Click or tap here to enter text.
1.2.19	Ability to track equipment downtime (in service/out of service) and for what reasons (reason for repair codes)	Choose an item.	Click or tap here to enter text.
1.2.20	Ability to increase the cost of an asset to include enhancements	Choose an item.	Click or tap here to enter text.
1.2.21	Ability to assign a user-defined unique ID to all assets consisting of, but not limited to, alphanumeric and special characters such as dashes or hyphens; Indicate maximum number of characters allowed and special characters allowed	Choose an item.	Click or tap here to enter text.
1.2.22	Ability to use a user-defined field to store a different asset ID number for use in linking to other City systems (e.g. ability to use a user-defined attribute field on the asset record to store the fixed asset ID from the City's financial system)	Choose an item.	Click or tap here to enter text.
1.2.23	Ability to store information related to engineering design/construction drawings (including but not limited to project name, designer, inspector, individual assets associated with project, related costs to project, construction/installation date)	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.2.24	Ability to create new asset record(s) using an existing asset record including carrying over selected attribute data – cloning	Choose an item.	Click or tap here to enter text.
1.2.25	Ability to generate a list of assets with warranty end dates approaching based on a user-defined timeframe	Choose an item.	Click or tap here to enter text.
1.2.26	Ability to link to stored permit information for each asset	Choose an item.	Click or tap here to enter text.
1.2.27	Ability to view hierarchical relationships between equipment and its components	Choose an item.	Click or tap here to enter text.
1.2.28	Ability to view hierarchical relationships between facility, equipment and its components	Choose an item.	Click or tap here to enter text.
1.2.29	Ability to track CIP projects, special projects, and in-house projects and differentiate between types	Choose an item.	Click or tap here to enter text.
1.2.30	Ability to identify each project and link all costs, resources, requirements, contracts, work orders etc. using that identifier to track total project cost	Choose an item.	Click or tap here to enter text.
Asset/Equipment Inspections			
1.2.31	Allows for multiple inspections/tests per asset/equipment to be recorded and stored. Inspection records should have fields to store date and performer information	Choose an item.	Click or tap here to enter text.
1.2.32	Ability to attach, link, and view a checklist or specific instructions for any type of inspection, testing, or repair	Choose an item.	Click or tap here to enter text.
1.2.33	Ability to maintain, track, and document the remaining useful life, condition, criticality and potential risk for an asset or facility	Choose an item.	Click or tap here to enter text.
1.2.34	Ability to create user-defined inspection forms/screens or modify standard system (pre-configured) forms/screens based on City's template for asset types and/or specific purposes	Choose an item.	Click or tap here to enter text.
1.2.35	Ability to automatically generate a follow-up work order if an inspection generates a result outside a user-defined threshold value	Choose an item.	Click or tap here to enter text.
1.2.36	Ability to generate a notification based on the condition documented on an inspection or test	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.2.37	Ability for inspection records for a given asset to be visible within that feature's module	Choose an item.	Click or tap here to enter text.
1.2.38	Ability for inspection ratings to be user-definable	Choose an item.	Click or tap here to enter text.
1.2.39	Ability for field inspection modules to be able to internally calculate next inspection dates on both fixed (based on schedule) and floating (based on completion) dates	Choose an item.	Click or tap here to enter text.

1.3. Service Requests

The solution should provide integrated service request functionality listed below.

#	Requirement	Response Code	Response/Comments
1.3.1	Ability to allow citizens to submit a request. Provide detail describing the system's ability to allow for a public input regarding service requests. It is desired to allow citizens to view their submissions, see other submissions, and receive status updates via e-mail/text	Choose an item.	Click or tap here to enter text.
1.3.2	Provide detail describing ability to integrate with other vendors' CRM systems or why your product is a better solution than using a 3rd-party CRM system	Choose an item.	Click or tap here to enter text.
1.3.3	Ability to create unique templates for various service request types with dropdown menus to identify questions to assist with obtaining helpful information from the customer and help with assigning a priority to the reported issue	Choose an item.	Click or tap here to enter text.
1.3.4	Ability to allow the user to record customer complaint information, and forward all service requests to the customer service desk or specific department supervisor	Choose an item.	Click or tap here to enter text.
1.3.5	Ability to auto generate an email/text notification to the customer acknowledging the request was received and provide the service request number	Choose an item.	Click or tap here to enter text.
1.3.6	Ability to send an "alert" to a department supervisor letting them know that a service request is pending	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.3.7	Ability to display or access any work activity by address, infrastructure system component type, activity, project, service request order number, or any combination thereof to update or close out a service request order	Choose an item.	Click or tap here to enter text.
1.3.8	Ability to select service request orders, by a status of Complete or Incomplete, within a specified date range	Choose an item.	Click or tap here to enter text.
1.3.9	Ability to allow the user to track service request orders on multiple types of infrastructure system components, including components of sanitary sewer collection systems, water distribution systems, storm water collection systems, and street systems	Choose an item.	Click or tap here to enter text.
1.3.10	Ability to allow the user to have access to user-defined fields and a comment field, for each affected infrastructure system component, regarding important information discovered during the service request order	Choose an item.	Click or tap here to enter text.
1.3.11	Ability to provide for unlimited user-defined work request codes	Choose an item.	Click or tap here to enter text.
1.3.12	Ability to provide bi-lateral status update with work order module for work orders to able to notify requestor of the status of the issue	Choose an item.	Click or tap here to enter text.
1.3.13	Ability to allow a supervisor to prioritize/reprioritize open service requests as needed	Choose an item.	Click or tap here to enter text.
1.3.14	Ability to allow the combining of multiple service requests into one work order	Choose an item.	Click or tap here to enter text.

1.4. Work Orders

The solution should provide integrated work order functionality listed below.

#	Requirement	Response Code	Response/Comments
1.4.1	Ability to generate and link multiple work orders from one service request and still maintain tracking of the original service requests	Choose an item.	Click or tap here to enter text.
1.4.2	Ability to track the following minimum data on the work order (both displayed onscreen and printed on work order): <ul style="list-style-type: none"> • Unique WO Number with the ability to link with other reference numbers • Work Order Type • Asset number/Component ID • Asset/Component information • Date and Time Initiated • Activity • Source • Initiator • Originator • Emergency (Y/N) • Problem Description • Location • System (i.e. traffic, storm) • Date/Time Work Started • Date/Time Completed • Status Code • Assigned To • Date/Time Assigned • Hours Worked • Materials Used • Equipment Used • Work Done/Comments • Estimated Hours • Fault Codes • Amount 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> • Date/Time Closed • Additional user-definable field • Priority 		
1.4.3	Ability to create a work order without a service request	Choose an item.	Click or tap here to enter text.
1.4.4	Ability to create work order templates for each Division for the type of service provided (i.e. sidewalk repair, traffic sign down, pot hole, trail maintenance, water meter install, plumbing repair, roof repair, elevators, etc.)	Choose an item.	Click or tap here to enter text.
1.4.5	Ability to automatically generate an email/text notification to another Division when a work order is scheduled (i.e. notify Tree Maintenance when a work order is scheduled for sidewalk repair in order to allow an inspection of the tree root condition before new concrete is poured)	Choose an item.	Click or tap here to enter text.
1.4.6	Ability to override the assigned crew with substitutes using a dropdown menu with staff names and job titles	Choose an item.	Click or tap here to enter text.
1.4.7	Ability to assign a work order to multiple crews, identifying the sequence of the work; the first crew will complete their portion of the work order and then route the work order to the next crew (i.e. the asphalt repair is completed and now the striping and sign crew is required to complete the work order)	Choose an item.	Click or tap here to enter text.
1.4.8	Ability to assign an event category (i.e. wind, rain, mudslide, traffic collision, vandalism, homeless, etc.)	Choose an item.	Click or tap here to enter text.
1.4.9	Ability to assign a priority to the work order (i.e. critical, urgent/safety issues, routine, low)	Choose an item.	Click or tap here to enter text.
1.4.10	Ability to track a project that includes multiple work orders from various departments	Choose an item.	Click or tap here to enter text.
1.4.11	Ability to display and print special instructions on all work orders	Choose an item.	Click or tap here to enter text.
1.4.12	Ability to indicate the work order requires regulatory compliance standards	Choose an item.	Click or tap here to enter text.
1.4.13	Ability to generate both scheduled and unscheduled work orders	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.4.14	Ability to display or access any work activity, by component ID or work order number to update or close out a work order	Choose an item.	Click or tap here to enter text.
1.4.15	Ability to accept a detail breakdown of all costs (including labor, material, and equipment costs) relating to the construction, inspection, maintenance, operation, and repair	Choose an item.	Click or tap here to enter text.
1.4.16	Ability to record multiple material or spare parts costs, part number, stock location, quantity, and extended (i.e. calculated) cost	Choose an item.	Click or tap here to enter text.
1.4.17	Ability to allow a sufficient amount of textual comments for each component. The user must be able to activate a comment box that can accept user entered comments	Choose an item.	Click or tap here to enter text.
1.4.18	Ability to record multiple equipment used including equipment ID, hours used, and extended (i.e. calculated) cost	Choose an item.	Click or tap here to enter text.
1.4.19	Ability to modify and update individual labor, material, and equipment cost line items, at any time	Choose an item.	Click or tap here to enter text.
1.4.20	Ability to allow the user to request or print any scheduled work order, by date, activity, priority, area, sub-area, facility, or any combination thereof	Choose an item.	Click or tap here to enter text.
1.4.21	Ability to allow for PM Schedules to be established both by time and usage	Choose an item.	Click or tap here to enter text.
1.4.22	Ability to calculate total labor (both total hours & cost) and total part costs from asset work order history	Choose an item.	Click or tap here to enter text.
1.4.23	Ability to compare estimated hours vs. actual hours	Choose an item.	Click or tap here to enter text.
1.4.24	Ability to track changes made to an existing work order	Choose an item.	Click or tap here to enter text.
1.4.25	Ability to print activity tasks on the work order along with a blank field to indicate completion. Any task left incomplete must be able to be dropped or automatically rolled into a future work order	Choose an item.	Click or tap here to enter text.
1.4.26	Ability to enable a work order to be created without associating the work order to an asset	Choose an item.	Click or tap here to enter text.
1.4.27	Ability to add multiple assets (same asset type) to a work order (e.g. work order created for inspecting fire extinguishers, valve	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	exercising, or hydrant flushing, and multiple assets are listed on the work order)		
1.4.28	Ability to add staff from different crews/groups to a work order	Choose an item.	Click or tap here to enter text.
1.4.29	Ability to add temporary employees to a work order	Choose an item.	Click or tap here to enter text.
1.4.30	Ability to limit permissions to complete, close, or cancel a work order	Choose an item.	Click or tap here to enter text.
1.4.31	Ability to identify overscheduled resources	Choose an item.	Click or tap here to enter text.
1.4.32	Ability to view work orders based on assignment date in a calendar view by day, week, month to support planning/scheduling of work	Choose an item.	Click or tap here to enter text.
1.4.33	Ability to view estimated hours associated with assigned work task/work order in a calendar view to support scheduling of work within a defined time period	Choose an item.	Click or tap here to enter text.
1.4.34	Ability to view work orders by group, crew, or employee in a calendar view to support scheduling of work within a defined time period	Choose an item.	Click or tap here to enter text.
1.4.35	Ability to change start/end dates on a work order from the calendar view to support scheduling of work	Choose an item.	Click or tap here to enter text.
1.4.36	Ability to track basic contractor information (name, address, contacts, phone numbers, etc.) that are used on work orders	Choose an item.	Click or tap here to enter text.
1.4.37	Ability to allow an unlimited number of reference documents of any file type (e.g., JPG, PDF, TIF, DOCX, XLSX, Email, etc.) to be linked to the work order. Also, the ability to link to these documents in the City's DMS system	Choose an item.	Click or tap here to enter text.
1.4.38	Ability to provide real-time statistics on completed and remaining work to be accomplished by specific work order and by work order type	Choose an item.	Click or tap here to enter text.
1.4.39	Ability to create master work orders with sub work orders	Choose an item.	Click or tap here to enter text.
1.4.40	Ability to track a group of work orders as a project	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.4.41	Ability to create a work order for contract services	Choose an item.	Click or tap here to enter text.
1.4.42	Ability to enable the user to change or cancel work orders after they have been scheduled, depending on login rights	Choose an item.	Click or tap here to enter text.
1.4.43	Ability to enable the user to apply corrections to closed and completed work orders	Choose an item.	Click or tap here to enter text.
1.4.44	Ability to generate work orders automatically	Choose an item.	Click or tap here to enter text.
1.4.45	Ability to enable service requests and preventative schedule to prompt the generation of work orders	Choose an item.	Click or tap here to enter text.
1.4.46	Ability to route work orders based on user-defined criteria in workflow design with manual override and rerouting capability	Choose an item.	Click or tap here to enter text.
1.4.47	Ability to route work orders for approval upon completion based upon user-defined requirements	Choose an item.	Click or tap here to enter text.
1.4.48	Ability to track all work activities performed in a specific location or within a specific area	Choose an item.	Click or tap here to enter text.
1.4.49	Ability to enter the hourly equipment rate for the use of rental equipment that is required but not available in the City's fleet	Choose an item.	Click or tap here to enter text.
1.4.50	Ability to indicate a work order is FEMA reimbursable when the work order is created or after the work order is closed; if after the work order is closed, recalculate the equipment rates using the FEMA rate schedule	Choose an item.	Click or tap here to enter text.
1.4.51	Ability to identify employees and/or crews available to be assigned to after-hours emergency work	Choose an item.	Click or tap here to enter text.
1.4.52	Ability to establish employee schedules including standard working days, multiple shifts and hours	Choose an item.	Click or tap here to enter text.
Service Level Agreements			
1.4.53	Ability to establish service level agreements on the asset type based on the number of days the work order has been open	Choose an item.	Click or tap here to enter text.
1.4.54	Ability to establish service level agreements for contractors based on the number of days the work order has been open	Choose an item.	Click or tap here to enter text.
1.4.55	Ability to automatically escalate work orders that exceed the number of days in the SLA	Choose an item.	Click or tap here to enter text.
1.4.56	Ability to report service response times that exceed compliance with the number of days to complete SLA	Choose an item.	Click or tap here to enter text.

1.5. GIS

Integration of the system with the City’s GIS is an extremely important part of the overall project. The City is seeking a seamless merging of new system functionality within its existing mapping applications. This approach will depend on an open API of the selected system vendor, customization work, innovation, and a thorough understanding of the different system architectures involved. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
1.5.1	Compatible with ESRI products (version 10.7.1)	Choose an item.	Click or tap here to enter text.
1.5.2	Ability to create a work order in WAMS while viewing a location or asset in GIS	Choose an item.	Click or tap here to enter text.
1.5.3	Ability to create a new GIS asset in the field	Choose an item.	Click or tap here to enter text.
1.5.4	Ability to select assets in a GIS map and create work orders associated with the selected assets	Choose an item.	Click or tap here to enter text.
1.5.5	Ability to query a work order and display in the map frame (the associated assets)	Choose an item.	Click or tap here to enter text.
1.5.6	Allow for the queried address in the system to be displayed in the map frame	Choose an item.	Click or tap here to enter text.
1.5.7	Ability to query a work order by address and display in the map frame	Choose an item.	Click or tap here to enter text.
1.5.8	Allow for the queried and/or selected assets (and types) in the frame to be sent to work order form fill	Choose an item.	Click or tap here to enter text.
1.5.9	Allow for viewing in the map frame all of the assets associated with a work order	Choose an item.	Click or tap here to enter text.
1.5.10	Ability for user to select an area in the map frame and the system will display all work orders contained within the area	Choose an item.	Click or tap here to enter text.
1.5.11	Ability for user to query work orders in the system that will be displayed in the map frame or printed based on the following criteria: <ul style="list-style-type: none"> • Status of a work order such as pending, open, or closed work orders • Type of work orders such as planned maintenance or emergency work orders • Age of work orders • Date of work orders 	Choose an item.	Click or tap here to enter text.

	<ul style="list-style-type: none"> • Work orders completed within a date range • Work orders completed by a specific crew • Work orders that have a cost within a user specified range • Combinations of all of the above factors <ul style="list-style-type: none"> – Work Orders of a certain asset type – Work Order activity – Work order associated with a Project – Work order associated with a group work order 		
1.5.12	Ability for user to select a work order within the system and the system passes the associated asset ID to the map frame (zoom to)	Choose an item.	Click or tap here to enter text.
1.5.13	Ability for user to select multiple work orders within the system and the system passes the associated asset ID's to the map frame (zoom to)	Choose an item.	Click or tap here to enter text.
1.5.14	<p>Ability for user to query a work order within the system by address and that address location is passed to the map frame. The user can query a customer service request in the system that will be displayed in the map frame or printed in a map (if a spatial hook is available (address, coordinate, e.g.,) based on the following:</p> <ul style="list-style-type: none"> • Status of a Customer Service Request • Date of Customer Service Request 	Choose an item.	Click or tap here to enter text.
1.5.15	<p>Ability for user to locate all other work orders on a map displayed within a user specified distance from the following:</p> <ul style="list-style-type: none"> • A point picked by the user • A utility feature picked by the user • A set of utility features picked by the user • An existing work order 	Choose an item.	Click or tap here to enter text.
1.5.16	From the system dashboard, ability for the user to send assigned work orders to map frame	Choose an item.	Click or tap here to enter text.
1.5.17	Ability to for map to be automatically and periodically refreshed to display new Customer Service Requests/Work Orders	Choose an item.	Click or tap here to enter text.
1.5.18	Ability to validate WAMS street names against street names in GIS	Choose an item.	Click or tap here to enter text.
1.5.19	Ability to use mobile devices with ArcGIS Collector to identify the physical location of maintenance that needs to be completed	Choose an item.	Click or tap here to enter text.

	while inspecting areas of the City; integrate ArcGIS Collector with WAMS		
1.5.20	Ability to query GIS to identify assets by condition code	Choose an item.	Click or tap here to enter text.
1.5.21	Ability for work order integration with CCTV video sewer inspection	Choose an item.	Click or tap here to enter text.
1.5.22	Ability to update asset attributes from within the WAMS application	Choose an item.	Click or tap here to enter text.
1.5.23	Ability to print or export (i.e. PDF format) a map with a legend and notes displaying work order or asset location	Choose an item.	Click or tap here to enter text.
1.5.24	Ability to provide analysis/comparisons of discrepancies between asset IDs between GIS and the WAMS and vice versa	Choose an item.	Click or tap here to enter text.

1.6. Preventative Maintenance

The solution should provide integrated preventative maintenance functionality listed below.

#	Requirement	Response Code	Response/Comments
1.6.1	Ability for all Preventive Maintenance work orders to include: <ul style="list-style-type: none"> • Unique Work Order Number • Asset Number/Component ID • Maintenance Activity Code • Schedule Frequency • Date Initiated • Initiated By • Date Scheduled • Scheduled By • Date Assigned • Assigned By • Date Completed • Completed By • Date Closed • Closed By • Work Type Code • Maintenance Type Code 	Choose an item.	Click or tap here to enter text.

	<ul style="list-style-type: none"> • Total cost • Vendor Equipment • Labor & Parts • GIS Link 		
1.6.2	Ability to enable scheduling of maintenance (user-defined time frames)	Choose an item.	Click or tap here to enter text.
1.6.3	Ability to allow Preventive Maintenance activities by a fixed method (for example, every month regardless of when the last Preventive Maintenance was complete)	Choose an item.	Click or tap here to enter text.
1.6.4	Ability to allow Preventive Maintenance activities by a floating method (for example, 30 days from the previous Preventive Maintenance close date)	Choose an item.	Click or tap here to enter text.
1.6.5	Ability to set up and schedule seasonal Preventive Maintenance activities	Choose an item.	Click or tap here to enter text.
1.6.6	Ability for a comment area on each work order	Choose an item.	Click or tap here to enter text.
1.6.7	Ability to easily modify a Preventive Maintenance schedule	Choose an item.	Click or tap here to enter text.
1.6.8	Ability to notify a selected list of users if Preventive Maintenance work orders are delinquent	Choose an item.	Click or tap here to enter text.
1.6.9	Ability to allow the generation of a single work for a single activity to be performed on multiple equipment items. (i.e. generate a work order to lube all chain drive units in a given area. When the work order is closed, automatically post material and labor costs to each individual equipment record and allow allocation of labor and parts equally, across all equipment items, or to separate equipment items)	Choose an item.	Click or tap here to enter text.
1.6.10	Ability to enable the creation of corrective/repair work orders during Preventive Maintenance without re-entering data	Choose an item.	Click or tap here to enter text.
1.6.11	Ability to add unlimited comments to the Preventive Maintenance work done	Choose an item.	Click or tap here to enter text.
1.6.12	Ability to support dependent Preventive Maintenance triggers (i.e. if an asset has a Preventive Maintenance triggered then a sub-component of the asset could also have a Preventive Maintenance triggered)	Choose an item.	Click or tap here to enter text.
1.6.13	Ability to enable triggering notification via email/text of Preventive Maintenance	Choose an item.	Click or tap here to enter text.

1.6.14	Ability to allow preventive maintenance to be scheduled by (1) time and/or date (2) meter usage (3) unit of product delivered (e.g. yard of ready mix concrete or ton of sand)	Choose an item.	Click or tap here to enter text.
1.6.15	Ability to allow for the association of PM tasks to one another so that a shop supervisor can group together certain PM tasks to be accomplished	Choose an item.	Click or tap here to enter text.
1.6.16	Ability to allow for multiple parts, materials, and special tools/equipment to be assigned to each PM task	Choose an item.	Click or tap here to enter text.
1.6.17	Ability for PM Schedules to be established both by time and usage	Choose an item.	Click or tap here to enter text.
1.6.18	Ability for PM Schedules to be established based on asset type or class	Choose an item.	Click or tap here to enter text.
1.6.19	Ability to display workloads for PM for a future period such as a by year, by week, by month, or by trade	Choose an item.	Click or tap here to enter text.
1.6.20	Ability to create a PM schedule with automatic generation of a work order based on user-defined criteria	Choose an item.	Click or tap here to enter text.
1.6.21	Ability to forecast and schedule preventative maintenance with the ability to modify as needed	Choose an item.	Click or tap here to enter text.

1.7. Inventory Management

The solution should provide integrated multi-department inventory management functionality listed below.

#	Requirement	Response Code	Response/Comments
1.7.1	Ability to inventory spare parts using min/max control	Choose an item.	Click or tap here to enter text.
1.7.2	Ability to set up so that all parts information can be accessed by part number, vendor part number, manufacturer part number, compatible unit code, commodity code, or barcode, as well as other searchable items	Choose an item.	Click or tap here to enter text.
1.7.3	Ability to establish and maintain a record of all parts used in maintenance and overhaul activities	Choose an item.	Click or tap here to enter text.
1.7.4	Ability to record and display all part issues, receipts, transfers and audits	Choose an item.	Click or tap here to enter text.

1.7.5	Ability to maintain a record for each vendor that is used for supplying parts for the maintenance equipment	Choose an item.	Click or tap here to enter text.
1.7.6	Ability to output an inventory report in a format compatible with Eden Financial software	Choose an item.	Click or tap here to enter text.
1.7.7	Ability to track multiple stocking locations and flag items that need to be ordered based on a preset stocking level	Choose an item.	Click or tap here to enter text.
1.7.8	Provide the ability to manage inventory at multiple locations	Choose an item.	Click or tap here to enter text.
1.7.9	Ability to transfer stock from one warehouse to another	Choose an item.	Click or tap here to enter text.
1.7.10	Provide for disposal of unused inventory items	Choose an item.	Click or tap here to enter text.
1.7.11	Provide the ability to reconcile inventory at year-end, at other specified intervals, and on-demand. This includes weekly cycle counting	Choose an item.	Click or tap here to enter text.
1.7.12	Allows inventory items taken from inventory to be added back to inventory. Also correcting any associated charges from the items being taken from inventory	Choose an item.	Click or tap here to enter text.
1.7.13	Ability to reserve inventory for capital and maintenance work orders	Choose an item.	Click or tap here to enter text.
1.7.14	Ability to accept partial orders or overages	Choose an item.	Click or tap here to enter text.
1.7.15	Ability to receive stock and non-stock items	Choose an item.	Click or tap here to enter text.
1.7.16	Ability order and receive parts with bar code capabilities	Choose an item.	Click or tap here to enter text.
1.7.17	Ability to track warranty replacements, core tracking/returns and vendor credits	Choose an item.	Click or tap here to enter text.
1.7.18	Ability to notify requestor when parts and materials are received or back ordered	Choose an item.	Click or tap here to enter text.

1.8. User Interface

The City will be evaluating the intuitiveness/ease of use of each solution's user interface design including information access, look, feel, and efficiency for all modules. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
1.8.1	Provide a user interface that is easy to navigate using intuitive menus structures tailored to the efficient entry of data	Choose an item.	Click or tap here to enter text.
1.8.2	Provide auto-complete feature to help users quickly enter values (i.e. street names)	Choose an item.	Click or tap here to enter text.
1.8.3	Provide an interface that must be fluid and responsive on desktop and mobile platforms	Choose an item.	Click or tap here to enter text.
1.8.4	Provide a design that should minimize number of clicks and screens needed to enter required information	Choose an item.	Click or tap here to enter text.
1.8.5	Provide dropdown menus and radio buttons to allow for swift entry of data.	Choose an item.	Click or tap here to enter text.
1.8.6	Provide a user interface that should follow a set of rules consistent with web-based applications, e.g. "F1" for help, "Ctrl-P" for print, "Ctrl-S" for save, etc.	Choose an item.	Click or tap here to enter text.
1.8.7	Provide validation of mandatory fields before allowing user to progress to the next screen and/or save the record	Choose an item.	Click or tap here to enter text.
1.8.8	Provide system field validation (e.g. date validation, and input values to be validated against tables)	Choose an item.	Click or tap here to enter text.
1.8.9	Provide system prompts to user before taking irreversible action	Choose an item.	Click or tap here to enter text.
1.8.10	Ability for system that supports basic word processing features, i.e. word-wrap, spell check, cut, copy and paste	Choose an item.	Click or tap here to enter text.
1.8.11	Provide a toolbar with graphical buttons to perform common functions	Choose an item.	Click or tap here to enter text.
1.8.12	Ability to visually distinguish between fields that are required and fields that are optional	Choose an item.	Click or tap here to enter text.
1.8.13	Support user-defined fields to store and track information as needed	Choose an item.	Click or tap here to enter text.
1.8.14	Multiple calendars may be defined and used throughout the system	Choose an item.	Click or tap here to enter text.

1.8.15	Calendars configurable for non-working days and City holidays	Choose an item.	Click or tap here to enter text.
1.8.16	Ability for user level preferences to be setup and saved	Choose an item.	Click or tap here to enter text.
1.8.17	Ability to remove or hide unused data fields on screens to reduce clutter	Choose an item.	Click or tap here to enter text.

1.9. Reporting and Analysis

The solution should provide a comprehensive, user friendly and robust reporting solution. The solution should include relevant standard reporting, ad hoc reports, queries, and export. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
1.9.1	Provide "out of the box" reports, i.e. open work orders, assigned work orders, completed work orders, assets scheduled for preventive maintenance, etc. Include a list of the report titles in the proposal	Choose an item.	Click or tap here to enter text.
1.9.2	Describe the capabilities of data queries and reporting and the skill set required to obtain information (i.e. casual user, IT professional) and the classroom training provided to train the users on how to use the tools	Choose an item.	Click or tap here to enter text.
1.9.3	Describe the ability to interface to any database driven system using any or all of the methods available within your software, including direct database connections, API calls, web service calls, and file exports/imports	Choose an item.	Click or tap here to enter text.
1.9.4	Describe reporting standards and recommended tools, including City staff access to the application database for custom report development	Choose an item.	Click or tap here to enter text.
1.9.5	Ability to print and email reports	Choose an item.	Click or tap here to enter text.
1.9.6	Ability to complete an inquiry or generate a report by project number for open and/or closed work orders within a date range	Choose an item.	Click or tap here to enter text.
1.9.7	Ability to search completed work orders within a date range and report labor, equipment and materials/inventory costs	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.9.8	Ability to select information to display on a report, i.e. date acquired, manufacturer, last inspection date, life to date maintenance costs, etc. then specify the asset type or class and the GIS geographic area of the City (i.e. council districts)	Choose an item.	Click or tap here to enter text.
1.9.9	Ability to report assets sorted by the last inspection date and condition assessment within a GIS geographic area and by address location	Choose an item.	Click or tap here to enter text.
1.9.10	Ability to display work orders completed by a specific crew	Choose an item.	Click or tap here to enter text.
1.9.11	Allow "out of the box" reports to be modified	Choose an item.	Click or tap here to enter text.
1.9.12	Support Microsoft SQL Server Reporting Services (SSRS) or Crystal Reports	Choose an item.	Click or tap here to enter text.
1.9.13	Provide a list of the reporting tools that are included and support industry best practice; identify any costs associated with each reporting tool and include it in the cost proposal	Choose an item.	Click or tap here to enter text.
1.9.14	Support ad hoc reporting	Choose an item.	Click or tap here to enter text.
1.9.15	Ability to save customized reports in a report repository making them available for other users	Choose an item.	Click or tap here to enter text.
1.9.16	Ability to view or report either open or completed work orders that are billed to an outside entity (i.e. FEMA, insurance companies for repair to property damage) within a date range	Choose an item.	Click or tap here to enter text.
1.9.17	Ability to view or report either open or completed work orders by event category (i.e. wind, rain, mudslide, traffic collision, vandalism, homeless, etc.)	Choose an item.	Click or tap here to enter text.
1.9.18	Ability to export data via PDF, MS Word and MS Excel	Choose an item.	Click or tap here to enter text.
1.9.19	Ability to query that allows the use to sort and filter on essentially all data	Choose an item.	Click or tap here to enter text.
1.9.20	Ability to easily print out desired information pertaining to just the records that are queried	Choose an item.	Click or tap here to enter text.
1.9.21	Provides historical asset tracking, from purchase, in-service or construction, maintenance, testing, retirement, to disposal	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.9.22	Provides reports for budgets, staffing analysis, program evaluation, performance	Choose an item.	Click or tap here to enter text.
1.9.23	Provides reports that meet GASB reporting requirements	Choose an item.	Click or tap here to enter text.
1.9.24	Provides labor scheduling with labor standards by task, ability to sort, and report the open work orders by location of work, craft and other ways	Choose an item.	Click or tap here to enter text.
1.9.25	Ability to report work done (sort, arrange, analyze, select, or list) by work order, assignee, asset, location (address, building, floor, room), type of equipment or asset	Choose an item.	Click or tap here to enter text.
1.9.26	Ability to report mean time between failures (MRBF) that show how often the asset or asset type has been worked on, how many days (or machine hours) lapsed between failures, and the duration of each repair	Choose an item.	Click or tap here to enter text.
1.9.27	Ability to report asset failures by failure type and frequency of failure	Choose an item.	Click or tap here to enter text.
1.9.28	Ability to track and report response time for a work order assigned to a contractor	Choose an item.	Click or tap here to enter text.
1.9.29	Ability to store and track vendor performance	Choose an item.	Click or tap here to enter text.
1.9.30	Ability to track and report response time for a service request/work order (including service request received time, crew/staff assignment time, arrival time, completion time)	Choose an item.	Click or tap here to enter text.
1.9.31	Ability to analyze asset downtime by user-selected parameters including but not limited to cost history of time lost, cost history of production lost, details of maintenance performed, failure analysis, and category of work performed	Choose an item.	Click or tap here to enter text.
Dashboards			
1.9.32	Describe available templates to build KPIs and "out of the box" features	Choose an item.	Click or tap here to enter text.
1.9.33	Describe the tools and features available to support creating dashboards	Choose an item.	Click or tap here to enter text.
1.9.34	Ability to establish key performance indicators that are calculated using maintenance data and asset attribute information to define the operating effectiveness and efficiency	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
1.9.35	Ability to view large scale improvements in dashboard format by geographic area with drill down ability to identify historic and current activity and costs, first by work orders associated with a project and then by open and completed work orders, i.e. when work was completed, what was done and the total value of the project	Choose an item.	Click or tap here to enter text.
1.9.36	Ability to display the quantity of work orders that exceed service level agreements (SLAs) and drill down to view the work orders	Choose an item.	Click or tap here to enter text.
1.9.37	Ability to drill down to view “active” work orders associated with a geographic area and view work orders scheduled to be completed at a future date	Choose an item.	Click or tap here to enter text.
1.9.38	Ability to configure dashboard to provide status of all outstanding work orders	Choose an item.	Click or tap here to enter text.
1.9.39	Ability to configure dashboard to show all items pending approval	Choose an item.	Click or tap here to enter text.
1.9.40	Ability to configure dashboard to show all items requiring user action	Choose an item.	Click or tap here to enter text.
1.9.41	Ability to configure dashboards based on department/group to support specific workflows for each department/group	Choose an item.	Click or tap here to enter text.
1.9.42	Ability to create dashboards displaying visual information (such as in a table, chart, pie graph, dial, etc.) for any data stored in the system (such as defined KPIs, track any function on a daily, weekly, or monthly basis, pending work orders, work order status, inventory supply, review activity, etc.)	Choose an item.	Click or tap here to enter text.

2. DEPARTMENT CORE REQUIREMENTS

2.1. Public Works - Water

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
2.1.1	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • Valves • Pipes • Hydrants • Flow Meters • Pump Stations • Wells • Storage Facilities • USA • Service Taps • Backflow Prevention Devices • Supply Sources • Sampling Stations • Pressure Regulating Valves/Pressure sustaining Valves and Altitude Control Valves 	Choose an item.	Click or tap here to enter text.
2.1.2	Ability to store field inspection information for the inventory items listed below, for example: <ul style="list-style-type: none"> • Valves • Hydrants • Flow Meters • Pump Stations • Wells • Storage Facilities • Backflow Prevention Devices • Supply Sources • Vaults 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> Pressure Regulating Valves / Pressure sustaining Valves, Air/Vacuum Valves and Altitude Control Valves 		
2.1.3	Ability to store information regarding hydrant flow testing	Choose an item.	Click or tap here to enter text.
2.1.4	Ability to store specific information about the following system features must also be stored in the Hydrant Flow Testing section as well as allowing for multiple entries for each item type: <ul style="list-style-type: none"> Wells running during the hydrant flow test Storage tank levels during the hydrant flow test Flow meter readings taken during the hydrant flow test 	Choose an item.	Click or tap here to enter text.
2.1.5	Ability to store information regarding valve exercising	Choose an item.	Click or tap here to enter text.
2.1.6	Ability to store information regarding backflow preventer testing and notify user in advance of when devices are to be tested annually	Choose an item.	Click or tap here to enter text.
2.1.7	Ability to store information regarding main breaks in the system and associate the main break record with a pipe segment in the pipe inventory information	Choose an item.	Click or tap here to enter text.
2.1.8	Ability to store water sampling results at each asset	Choose an item.	Click or tap here to enter text.
2.1.9	Ability to associate photos to work orders	Choose an item.	Click or tap here to enter text.
2.1.10	Ability to store assets and attribute/additional information related to pump/lift stations and the associated pumps and equipment (including but not limited to specifications, classifications, curves, wet well information, etc.)	Choose an item.	Click or tap here to enter text.

2.2. Public Works – Street Maintenance

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Vendor Response/Comments
2.2.1	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • Signs (date installed, dates of maintenance cycle, tracking future maintenance, retro-reflectivity testing and treatment, size, shape, what's on sign) • Pavement Markings (paint, dura-stripe, reflectors, buttons, etc.) • Traffic Calming Devices (type, location, date installed, maintenance, striping) • Curbs • Sidewalks • Sewer lines • Storm Water lines • Channels • Manholes 	Choose an item.	Click or tap here to enter text.
2.2.2	Ability to provide a cross-reference capability for associating equipment to intersections and street segments	Choose an item.	Click or tap here to enter text.
2.2.3	Ability to create a work order template to track graffiti removal by city staff	Choose an item.	Click or tap here to enter text.

2.3. Public Works – Fleet Operations

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
Fleet Management			
2.3.1	Ability to maintain information on each piece of equipment including: <ul style="list-style-type: none"> • Equipment number • Year • Make • Model • VIN/Serial number • License plate • Color • Date acquired • In service date • Out of service date • Disposal date • Disposal revenue 	Choose an item.	Click or tap here to enter text.
2.3.2	Maintain historical information for each piece of equipment including: <ul style="list-style-type: none"> • Vehicle mileage and Fuel quantity and costs (transferred from the Fuel Master application) • Parts • Labor • Work contracted out • Accident or damage, date of incident, repair cost • Warranty from initial claim to reimbursement received • Required inspections (i.e. Smog and CHP) 	Choose an item.	Click or tap here to enter text.
2.3.3	Ability to track all vehicle life cycle costs, i.e. purchase price, depreciation, operating expense, maintenance costs, salvage value and replacement cost	Choose an item.	Click or tap here to enter text.
2.3.4	Ability to add additional equipment or features added to a vehicle including the acquisition date and cost	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
2.3.5	Ability to assign a vehicle to a Department and to a driver	Choose an item.	Click or tap here to enter text.
2.3.6	Ability to inquire and view all costs associated with a piece of equipment	Choose an item.	Click or tap here to enter text.
2.3.7	Ability to access system via tablet/laptop at service bays	Choose an item.	Click or tap here to enter text.
Preventive Maintenance			
2.3.8	Ability to track preventive maintenance schedules for each piece of equipment in any combination of time, mileage	Choose an item.	Click or tap here to enter text.
2.3.9	Ability to create a shop schedule with a list of PMs due	Choose an item.	Click or tap here to enter text.
2.3.10	Ability to automatically generate an email/text notification to the Department and to the assigned driver (if applicable) that a PM is due	Choose an item.	Click or tap here to enter text.
Work Orders			
2.3.11	Ability to assign multiple mechanics on one work order	Choose an item.	Click or tap here to enter text.
2.3.12	Ability to enter a vehicle number and display all previous work orders associated with the vehicle	Choose an item.	Click or tap here to enter text.
2.3.13	Ability to alert the user when a part is covered under warranty	Choose an item.	Click or tap here to enter text.
Reporting			
2.3.14	Ability to generate a report listing PMs completed on time and the compliance percentage	Choose an item.	Click or tap here to enter text.
2.3.15	Ability to generate a report listing all equipment currently with an "open" work order	Choose an item.	Click or tap here to enter text.
2.3.16	Ability to generate vehicle replacement schedules based on lifecycle data	Choose an item.	Click or tap here to enter text.
2.3.17	Ability to generate a report listing all vehicles within a mileage range	Choose an item.	Click or tap here to enter text.
2.3.18	Ability to generate a completed work order report by mechanic	Choose an item.	Click or tap here to enter text.
2.3.19	Ability to generate reports for auditing and year-end fiscal auditing	Choose an item.	Click or tap here to enter text.

2.4. Public Works – City Facility Operations

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
2.4.1	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • HVAC • Elevators • Buildings • Parking structure 	Choose an item.	Click or tap here to enter text.
2.4.2	Ability to add a facility, i.e. property and building/structure names, address	Choose an item.	Click or tap here to enter text.
2.4.3	Ability to add the number of floors to a facility and the square footage	Choose an item.	Click or tap here to enter text.
2.4.4	Ability to add floor plans	Choose an item.	Click or tap here to enter text.
2.4.5	Ability to identify tenant improvements	Choose an item.	Click or tap here to enter text.
2.4.6	Ability to attach PDF drawings, pictures, maps and documents to a facility	Choose an item.	Click or tap here to enter text.
2.4.7	Ability to associate assets with a property including date acquired, cost, warranty and work order history	Choose an item.	Click or tap here to enter text.
2.4.8	Provide a standard framework and set of tools for facility condition assessments. The application should be scalable to include conditions ratings for equipment, heating (boilers, furnaces), air conditioning (cooling towers, chillers), roofing (materials, age), electrical (transformers, emergency generators, main distribution panels), plumbing (hot water, sanitary sewer, backflow preventer), elevators, building exterior (walls, doors, windows, stairways), parking (pavement, curbs, drains, sidewalks), kitchen (freezer, refrigerator, ovens)	Choose an item.	Click or tap here to enter text.
2.4.9	Provide space usage, i.e. how many square feet are assigned to a department	Choose an item.	Click or tap here to enter text.
2.4.10	Track and provide reports on furniture and equipment assigned to a space, person, or department	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
2.4.11	Ability to track vendors including subcontractors and suppliers associated with a facility, the service they provide, contact information, and any applicable agreement information (term of the agreement, cost). Examples are: <ul style="list-style-type: none"> • Pest Control • Elevators • Generators • Fire extinguishers • Fire sprinklers • HVAC • Steam cleaning • Solar panels 	Choose an item.	Click or tap here to enter text.
2.4.12	Identify access control points within the facility	Choose an item.	Click or tap here to enter text.

2.5. Public Works - Traffic

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
2.5.1	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • Traffic signals • Traffic signs • Pedestals • Curbs (red zone, loading zone, etc.) • Bike lanes • Street Lights (wattage, type of light, type of pole, height, shielding, date installed, maintenance) • Controllers • Radar feedback • Signal flashers • Pedestrian crossings • Fiber 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> Intersections 		
2.5.2	Provide a record of all traffic devices and test results	Choose an item.	Click or tap here to enter text.
2.5.3	Provide a cross-reference capability, (i.e., signal address cross-referenced to part)	Choose an item.	Click or tap here to enter text.
2.5.4	Ability to display the most recent activity performed on a traffic device, including activity type and date. When a new activity is added, the traffic main screen must automatically be updated	Choose an item.	Click or tap here to enter text.
2.5.5	Provide check boxes for indicating whether cleaning of traffic device components was performed	Choose an item.	Click or tap here to enter text.
2.5.6	Ability for additional comments to be associated with the performance of each device tested	Choose an item.	Click or tap here to enter text.
2.5.7	Ability to display the following information for all the scheduled maintenance associated with traffic devices: <ul style="list-style-type: none"> Work order status Scheduled maintenance interval Next scheduled maintenance date Last scheduled maintenance date Start of scheduling cycle End of scheduling cycle Crew assigned to maintenance Authorization for the WO Type of maintenance 	Choose an item.	Click or tap here to enter text.

2.6. Community Services – Parks

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
Parks Maintenance			
2.6.1	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • Parks • Trees • Community Buildings • Storm Drain Inlets • Lakes & Streams • Picnic Shelters • Lighting • Concrete Paths • Fences & Gates • Restrooms • BBQs • Trash cans • Picnic Tables • Benches • Drinking fountains • Playground equipment • Irrigation Controllers • Backflow Prevention Devices • Signs 	Choose an item.	Click or tap here to enter text.
2.6.2	Ability to capture inspections and monthly preventative maintenance for park safety, playground and snack bar	Choose an item.	Click or tap here to enter text.
City Facilities/ROW/Assessment Districts			
2.6.3	Ability to provide a physical inventory of City Facilities assets, for example: <ul style="list-style-type: none"> • Irrigation Controllers 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> • Irrigation Isolation Valves • Structures • Trees • Fences & Gates • Benches • Utility POCs • Buildings • Fountains • Lighting • Backflow Prevention Devices • Trails • Restrooms • Sports fields • Booster pumps 		
2.6.4	Ability to track inspections of backflow devices at City facilities	Choose an item.	Click or tap here to enter text.
2.6.5	Ability to track inspections for work done by contractors in City ROW, parks, facilities, trails and private project reviews	Choose an item.	Click or tap here to enter text.
2.6.6	Ability to manage vendor contracts for custodial and landscape work	Choose an item.	Click or tap here to enter text.
2.6.7	Ability to generate a To-Do list to manage tasks	Choose an item.	Click or tap here to enter text.
2.6.8	Ability to provide a physical inventory of ROW assets, for example: <ul style="list-style-type: none"> • Irrigation Controllers • Backflow Prevention Devices • Trees • Water & Electrical POCs • Access Gates • Fences & Gates 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
2.6.9	Ability to create user-defined Assessment Districts	Choose an item.	Click or tap here to enter text.
2.6.10	Ability to provide a physical inventory of Assessment District assets, for example: <ul style="list-style-type: none"> • Irrigation Controllers • Backflow Prevention Devices • Trees • Water & Electrical POCs • Lighting • Fences & Gates • Railing • Storm Drain Inlets • Concrete Paths • Dog Waste Bag Dispensers • Trash Receptacles • Bio Swale & Retention Basin • DG Paths • Benches • Bridge 	Choose an item.	Click or tap here to enter text.
2.6.11	Ability to track Assessment Districts requests and responses	Choose an item.	Click or tap here to enter text.
2.6.12	Ability to track requests and responses on non-City maintained trails with the City	Choose an item.	Click or tap here to enter text.
Skilled Maintenance			
2.6.13	Ability to provide a physical inventory of assets, for example: <ul style="list-style-type: none"> • Structures • Pumps • Lighting • Utility POCs • Fences & Gates • Equipment 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
2.6.14	Ability to track assets at different levels of detail	Choose an item.	Click or tap here to enter text.
2.6.15	Provide report for supervisor and management to see all outstanding work orders at any given time	Choose an item.	Click or tap here to enter text.

2.7. Community Services – Recreation

The solution should provide for the general and specific functionality listed below.

#	Requirement	Response Code	Response/Comments
Parks & Facilities Attendants			
2.7.1	Ability to generate service requests and to monitor the status of a work order	Choose an item.	Click or tap here to enter text.
2.7.2	Ability to generate a checklist of duties for night staff to coordinate their work	Choose an item.	Click or tap here to enter text.
2.7.3	Ability to create a facility reservation check in/out document for customers to review what they are responsible for with reservation	Choose an item.	Click or tap here to enter text.
2.7.4	Ability to track specified items that have been assigned daily to attendants. The items can be user-defined	Choose an item.	Click or tap here to enter text.

3. TECHNICAL REQUIREMENTS

3.1. Maintenance and Support

The solution should be a commercially available product that supports the requirements below.

#	Requirement	Response Code	Response/Comments
Hosted Solution requirements			
3.1.1	Provides for upgrades to accommodate changes in laws, regulations, best practices, and new technology - Please describe in the “Response/Comments” column which types of upgrades would be provided/available as part of the maintenance cost, and which would require additional fees to be paid by the City	Choose an item.	Click or tap here to enter text.
3.1.2	Provides near or real-time mirroring for Disaster Recovery service to an off-site location - Please identify in the “Response/Comments” column whether proposal offers “near real-time” or “real-time” mirroring	Choose an item.	Click or tap here to enter text.
3.1.3	Support of City Recovery Point Objectives (RPO), Recovery Time Objectives (RTO), and Recovery Consistency Objectives (RCO) as it relates to disaster recovery or data protection plan	Choose an item.	Click or tap here to enter text.
3.1.4	Provides connectivity via ADFS	Choose an item.	Click or tap here to enter text.
3.1.5	Provides system availability 24 hours a day, 365 days a year (not including scheduled downtime)	Choose an item.	Click or tap here to enter text.
3.1.6	Ensures scheduled downtime is pre-approved by the City one week in advance	Choose an item.	Click or tap here to enter text.
3.1.7	Provides system uptime of 99.999%	Choose an item.	Click or tap here to enter text.
3.1.8	Provides a compliant cloud computing environment with security and protection to meet the needs for government. Examples mentioned includes Microsoft Azure (Azure Government) and Amazon Web Services (AWS – GovCloud)	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
3.1.9	Provides hosting facility that is SSAE 16 certified	Choose an item.	Click or tap here to enter text.
3.1.10	Explain where the data physically exists – both in production and in backup environments	Choose an item.	Click or tap here to enter text.
3.1.11	Provides for continuous backup of data and transactions such that the City will not suffer data loss in the event of a disaster or catastrophic failure	Choose an item.	Click or tap here to enter text.
3.1.12	Provides a “Trusted System” for backups according to requirements defined by the State of California	Choose an item.	Click or tap here to enter text.
3.1.13	Provides for scheduled, periodic backup of live data to the test/training environment	Choose an item.	Click or tap here to enter text.
3.1.14	In the event of a disaster or catastrophic failure, informs the City: <ul style="list-style-type: none"> • Within one hour • The scale and quantity of the data loss • What Proposer has done to recover the data and mitigate any effect of the data loss • What corrective action Proposer has taken to prevent future data loss 	Choose an item.	Click or tap here to enter text.
3.1.15	Expected response time for trouble tickets	Choose an item.	Click or tap here to enter text.
On Premises requirements			
3.1.16	Provides for upgrades to accommodate changes in laws, regulations, best practices, and new technology <ul style="list-style-type: none"> - Please describe in the “Response/Comments” column which types of upgrades would be provided/available as part of the maintenance cost, and which would require additional fees to be paid by the City 	Choose an item.	Click or tap here to enter text.
3.1.17	Support of City Recovery Point Objectives (RPO), Recovery Time Objectives (RTO), and Recovery Consistency Objectives (RCO) as it relates to disaster recovery or data protection plan	Choose an item.	Click or tap here to enter text.
3.1.18	Provides a tool for City IT staff to update the system with patches and new releases	Choose an item.	Click or tap here to enter text.
3.1.19	Provides connectivity via ADFS	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
3.1.20	Expected response time for trouble tickets	Choose an item.	Click or tap here to enter text.
System Documentation and Training			
3.1.21	Provide online context-sensitive help selection that can be accessed from any screen and displays help related to the screen in use	Choose an item.	Click or tap here to enter text.
3.1.22	Provide complete installation, operating, and system maintenance documentation	Choose an item.	Click or tap here to enter text.
3.1.23	Ability to search online help to assist with specific topics	Choose an item.	Click or tap here to enter text.
3.1.24	Ability to configure the online help files	Choose an item.	Click or tap here to enter text.
Help Desk Support			
3.1.25	Provide a Help desk that answers calls, records, tracks, and monitors requests and triages unresolved issues	Choose an item.	Click or tap here to enter text.
3.1.26	Provide a Help desk for service requests to be made via e-mail or web interface	Choose an item.	Click or tap here to enter text.
3.1.27	Provide a Call Center located in the United States	Choose an item.	Click or tap here to enter text.
3.1.28	Provide a Help desk that has an Orange County area code (714 or 657), or provides a toll free number	Choose an item.	Click or tap here to enter text.
3.1.29	Provide a Call Center where calls are answered by a live technician during regular business hours (06:30am-05:00pm PST, Mon-Fri) and on-call support is available during non-business hours and holidays	Choose an item.	Click or tap here to enter text.
3.1.30	Provide for all support requests to be logged through the vendor's Help Desk application	Choose an item.	Click or tap here to enter text.
3.1.31	Provide for service request reports to be queried by date range, incident types, as well as other filtered values	Choose an item.	Click or tap here to enter text.
3.1.32	Provide a help desk request escalation process and identify who in the organization is notified when SLAs are not met	Choose an item.	Click or tap here to enter text.
3.1.33	Provide upgrades, patches and other application maintenance; describe any associated costs and include the costs in the cost proposal	Choose an item.	Click or tap here to enter text.

3.2. Environment

The solution should be designed to work within the City’s current technology environment. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
3.2.1	Proposed WAMS must operate in the following environment: Server: Microsoft Windows Server 2016 or greater Network: Microsoft Active Directory (2012 R2 or greater) Client: Microsoft Windows 10 update 1909 or greater Database: MS SQL Server 2016 SP2 CU12 or greater VMWare: ESXi 6.7 U3 or greater	Choose an item.	Click or tap here to enter text.
3.2.2	Specify minimum and recommended server specifications and requirements	Choose an item.	Click or tap here to enter text.
3.2.3	Specify minimum Desktop PC specifications	Choose an item.	Click or tap here to enter text.
3.2.4	Specify minimum Laptop PC specifications	Choose an item.	Click or tap here to enter text.
3.2.5	Specify minimum tablet specifications	Choose an item.	Click or tap here to enter text.
3.2.6	Specify minimum and recommended networking hardware specifications (LAN)	Choose an item.	Click or tap here to enter text.
3.2.7	Specify minimum remote connectivity requirements for laptops/tablets in the field and or in vehicles	Choose an item.	Click or tap here to enter text.
3.2.8	Specify browser requirements	Choose an item.	Click or tap here to enter text.
3.2.9	Specify any other software that needs to be installed for your application to work properly	Choose an item.	Click or tap here to enter text.

3.3. Audit and Security

The solution should be designed to protect all data from unauthorized access or alteration. Potentially unique or custom requirements are listed below.

#	Requirement	Response Code	Response/Comments
3.3.1	Enforces City's password policy: <ul style="list-style-type: none"> • Must be non-printing/displaying • Must be a minimum length of ## characters • Must use combination of alpha numeric and special characters • Must allow system administrator to define password expiration timeframe • Must allow system administrator to prohibit reusing of passwords 	Choose an item.	Click or tap here to enter text.
3.3.2	Allows the system administrator to: <ul style="list-style-type: none"> • Configure control access to the application, modules, transactions, forms, menus and data • Define data access rights (e.g. create, read, update, delete) by user ID or functional role • Define functional access rights (e.g. processes, screens, fields and reports) by user ID or functional role • Restrict access to sensitive data elements (e.g. social security numbers, banking data, etc.) by user ID, user groups, or functional role • Assign workflow security permissions by department, division, user role/group (e.g. supervisor can only set a work order status to complete) 	Choose an item.	Click or tap here to enter text.
3.3.3	Maintains audit logging to record access activity: <ul style="list-style-type: none"> • Login/logout attempts by user and workstation • User submitted transactions • Transaction approvals and changes in approval levels • Approval delegation activity • Initiated processes • System overrides 	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	<ul style="list-style-type: none"> Additions, changes, or deletes to application maintained data 		
3.3.4	Allows the system administrator to define what transaction types are audited	Choose an item.	Click or tap here to enter text.
3.3.5	Allows the system administrator to query the audit log by type of access, date/time stamp range, user identification, and terminal ID	Choose an item.	Click or tap here to enter text.
3.3.6	Captures defined transaction details and allows authorized staff to view that detail	Choose an item.	Click or tap here to enter text.
3.3.7	Provides object, row, and field level security	Choose an item.	Click or tap here to enter text.
3.3.8	Restricts access to specific screens or processes	Choose an item.	Click or tap here to enter text.
3.3.9	Provides user group security	Choose an item.	Click or tap here to enter text.
3.3.10	Extends security settings to reporting tools/layers	Choose an item.	Click or tap here to enter text.
3.3.11	Provides for all system websites to be secured and accessed via SSL	Choose an item.	Click or tap here to enter text.
3.3.12	Provide for identified security vulnerabilities being addressed in the current version of the software	Choose an item.	Click or tap here to enter text.
Hosted Solution requirements			
3.3.13	<p>Upon discovery or reasonable belief of any data breach, notifies the City by the fastest means available, and also in writing within 24 hours. Notification should include:</p> <ul style="list-style-type: none"> The nature of the breach The data accessed, used, or disclosed The person(s) who accessed, used, disclosed, and/or received data (if known) What has been done to quarantine and mitigate the breach <p>What corrective actions has been taken to prevent future breaches</p>	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
3.3.14	Provides daily updates regarding findings and actions performed until the breach has been effectively resolved to the City's satisfaction	Choose an item.	Click or tap here to enter text.
3.3.15	Provides a report containing the results of the investigation of the breach	Choose an item.	Click or tap here to enter text.

3.4. Mobility

The solution should be designed to work with mobile devices. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
3.4.1	Identify the types of devices your system supports for iOS, Android, and Microsoft Windows. Describe the features that are available in each type of device. Define the release versions that are supported and how new release versions are introduced and how support for previous release versions is discontinued	Choose an item.	Click or tap here to enter text.
3.4.2	Ability for information to be entered using a mobile device is uploaded in real time, or work offline then automatically synchronize when the network connection is restored	Choose an item.	Click or tap here to enter text.
3.4.3	Explain differences between functionality available on a field data collection device vs office workstation	Choose an item.	Click or tap here to enter text.
3.4.4	Ability for staff to generate service requests and work orders while working in the field	Choose an item.	Click or tap here to enter text.
3.4.5	Ability to create a new GIS asset in the field	Choose an item.	Click or tap here to enter text.
3.4.6	Ability for staff to update service requests and work orders while working in the field	Choose an item.	Click or tap here to enter text.
3.4.7	Ability to support asset identification using mobile tools to record the physical location, enter the asset type and then prompt for asset information for the type of asset	Choose an item.	Click or tap here to enter text.
3.4.8	Ability to indicate additional approval is required on a work order, and obtained, because the work task will take longer than planned due to special circumstances	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
3.4.9	Ability to store, access and display asset images (PDF, DWG, JPG, XLSX, DOCX) including moving video (AVI MPEG, etc.) images. Also, the ability to link to these documents in the City's DMS system	Choose an item.	Click or tap here to enter text.
3.4.10	Provide for work orders requiring work by multiple units (or crews) the ability to automatically route a work order to the next assigned unit when the first unit completes their task	Choose an item.	Click or tap here to enter text.
3.4.11	Provide Data Encryption at rest and in-transit	Choose an item.	Click or tap here to enter text.
3.4.12	Ability to automatically optimize display for screen size of device used	Choose an item.	Click or tap here to enter text.
3.4.13	As security requirements continue to evolve, any mobile solution must support multi-factor authentication (MFA).	Choose an item.	Click or tap here to enter text.
3.4.14	Field/mobile access requires the use of AD security groups to allow/disallow remote access to City resources.	Choose an item.	Click or tap here to enter text.

3.5. Interoperability / System Interfaces

The solution should provide the ability to import and export data to and from external systems and/or integrate real-time with external systems. Specific requirements are listed below.

#	Requirement	Prebuilt? (Yes/No)	If No, Cost to Develop	Comments / level of development effort required to accommodate requirement
3.5.1	Provides an Application Program Interface (API) to enable the exchange of information (both inbound and outbound) with other business applications using a variety of protocols including but not limited to XML, delimited, ASCII, and txt files (including ODBC connectivity to Excel)	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.2	Provides a configurable API such that new interfaces can be defined, or existing interfaces can be modified by an administrator without requiring the support of the software provider	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.

#	Requirement	Prebuilt? (Yes/No)	If No, Cost to Develop	Comments / level of development effort required to accommodate requirement
3.5.3	Provides the ability to specify the editing criteria (including both field validation and consistency edits) to be applied to inbound transactions and ensures that transactions submitted via the API are subject to the same business rules as transactions submitted via the user interface	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.4	Provides the ability to specify whether outbound interface transactions should be sent immediately or stored and forwarded at a specific time or at specific intervals	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.5	Provides a notification to users of transactions that fail edits and provides a way for user to view, update, delete, and automatically resubmit transactions for processing or to be returned to the originating applications	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.6	Eden; ERP After each payroll is processed in Eden, the ability to transfer the employee regular time, overtime and double-time pay rates, the employee status (active, jury duty, bereavement, leave of absence, modified duty, etc.), and available benefit accruals (paid time off, comp time, etc.) to WAMS for use in calculating the current cost of labor	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.7	ERSI; GIS	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.8	Laserfiche; Document Management System	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.9	Fuel Master; Fuel Management System	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.

#	Requirement	Prebuilt? (Yes/No)	If No, Cost to Develop	Comments / level of development effort required to accommodate requirement
3.5.10	GraniteXP; Sewer Camera System	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.11	MicroPaver; Pavement Management System	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.
3.5.12	Arbor Access; Tree Inventory System (hosted by contractor)	Choose an item.	Click or tap here to enter text.	Click or tap here to enter text.

3.6. Professional Services

The solution should provide professional consulting services. Specific requirements are listed below.

#	Requirement	Response Code	Response/Comments
3.6.1	Describe Annual Service and Maintenance Agreement offerings for ongoing support and future upgrades. Explain how the standard WAMS Service and Maintenance Agreement is structured. How are increases structured? Explain how customer is notified of updates and patches (and how updates/patches are typically delivered)	Choose an item.	Click or tap here to enter text.
3.6.2	Provide that all software demonstrations and other presentations will be performed by the assigned vendor project manager. Others may assist, but the vendor project manager must be physically present	Choose an item.	Click or tap here to enter text.
3.6.3	Provide number of hours and type of resources required from the vendor and required from the client by position, hours, and expertise	Choose an item.	Click or tap here to enter text.
3.6.4	Provide project management services to ensure the project is completed in a professional manner, software installation is	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
	installed on time and on schedule, and data conversion is completed, accurate, and installed on time and on schedule		
3.6.5	Demonstrate that the vendor has a structure in place to address issue management and conflict resolution	Choose an item.	Click or tap here to enter text.
3.6.6	Provide professional software application training for the WAMS. Training must include hands-on practice along with helpful training materials	Choose an item.	Click or tap here to enter text.
3.6.7	Software system installation must come with a 6 month acceptance period	Choose an item.	Click or tap here to enter text.
3.6.8	Software system should come with one year of software support, (consisting of telephone support via phone number), with annual renewals options	Choose an item.	Click or tap here to enter text.
3.6.9	On-going software support for subsequent years must be available through a software maintenance agreement	Choose an item.	Click or tap here to enter text.
3.6.10	Software system vendor must have the ability to provide software engineering, custom programming, and database development support (if necessary)	Choose an item.	Click or tap here to enter text.
3.6.11	Software system vendor must specify the optimal server specifications based on the City's database standard (Microsoft SQL Server)	Choose an item.	Click or tap here to enter text.
3.6.12	Software system vendor must provide consulting services if the user requires these services and are part of the vendor's scope of work. Consulting services will include, but will not be limited to, workflow management, system integration, system interface design, and new system design and development	Choose an item.	Click or tap here to enter text.
3.6.13	Describe where your closest, dedicated and readily available support personnel are located	Choose an item.	Click or tap here to enter text.
3.6.14	Provide an implementation timeline for delivery, data conversion, hardware/software installation, etc.	Choose an item.	Click or tap here to enter text.

#	Requirement	Response Code	Response/Comments
Training			
3.6.15	Describe where your closest training support personnel are located	Choose an item.	Click or tap here to enter text.
3.6.16	Describe any on-going training programs available to clients	Choose an item.	Click or tap here to enter text.
3.6.17	Describe any training/support elements of your company that will help the City achieve optimal use of the product for their specific needs	Choose an item.	Click or tap here to enter text.
3.6.18	Provide on-site user training	Choose an item.	Click or tap here to enter text.
3.6.19	Provide refresher training that is available at regular intervals based on the City's requirements	Choose an item.	Click or tap here to enter text.
3.6.20	Provide a comprehensive user's manual for each user/site license documenting all operations of the system including System Administration functions. Manuals must include sample reports, screen illustrations and instructions, and example problems	Choose an item.	Click or tap here to enter text.

Appendix D – Mandatory Pricing Sheets

The Proposer must complete the Vendor Cost Worksheet provided in the electronic Microsoft Excel **file format that will be provided separately on the City's website** (<https://www.cityoforange.org/Bids.aspx?CatID=17>); a sample is included in this RFP; the completed Worksheet must be submitted with the Proposal.

Proposer Name:

Description	# of Licenses	One-Time License Cost	Annual Maintenance Fee					Vendor Notes and/or Assumptions
			Year 1	Year 2	Year 3	Year 4	Year 5	
Work Order and Asset Management System (WAMS) Modules								
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Subtotal - WAMS Modules		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Modules (i.e. system tools, reporting, etc.)								
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Subtotal - Other Modules		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Application Licensing Fees		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

Proposer Name:

Description	# of Licenses	One-Time License Cost	Annual Maintenance Fee					Vendor Notes and/or Assumptions
			Year 1	Year 2	Year 3	Year 4	Year 5	
Work Order and Asset Management System (WAMS) Modules								
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
Subtotal - WAMS Modules		N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Modules (i.e., system tools, reporting, etc.)								
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
	-	N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
Subtotal - Other Modules		N/A	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Solution Pricing Fees		N/A	\$ -	\$ -	\$ -	\$ -	\$ -	

Proposer Name:

Work Order and Asset Management System (WAMS) Modules

Service Category (Please add categories as required)	Hours	Rate	Implementation Fee	Notes / Assumptions
Implementation Consulting / Configuration Support	-	\$ -	\$ -	
Project Management	-	\$ -	\$ -	
Training	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
Subtotal - WAMS Modules	-		\$ -	

Other Modules

Service Category (Please add categories as required)	Hours	Rate	Implementation Fee	Notes / Assumptions
Implementation Consulting / Configuration Support	-	\$ -	\$ -	
Project Management	-	\$ -	\$ -	
Training	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
Subtotal - Other Modules	-		\$ -	
Total - Implementation Services	-		\$ -	

Proposer Name:

Integrations	Hours / Module	Rate	Integration Fee	Integration Assumptions
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
Total - Integrations	-		\$ -	

Proposer Name:

3rd Party Product Description	Cost	Notes / Assumptions
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
Total - 3rd Party Products	\$ -	

Proposer Name:

Product/Solution Description	Cost	Notes / Assumptions
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
Total - Optional Offerings	\$ -	

Proposer Name:

Trip Descriptions	# of Trips	Cost Per Trip	Total	Notes / Assumptions
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
	-	\$ -	\$ -	
Total Travel Expenses	-		\$ -	

Proposer Name:

Resource Category (Please add categories as necessary)	Hourly Rate	Notes / Assumptions
Programmer	\$ -	
Business / Systems Analyst	\$ -	
Project Management	\$ -	
Trainer	\$ -	
Conversion Support	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	

Appendix E – Certificate of Non-Collusion

CERTIFICATE OF NON-COLLUSION

[Note: This form must be completed and signed by an authorized representative of each bidder.]

Be it known that _____ (name),
being first duly sworn, deposes and testifies that he/she is the _____
(relationship with bidding firm), of _____ (legal name of
bidding firm), making the foregoing bid:

1. The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation.
2. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid.
2. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding.
3. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder.
4. All statements contained in the bid are true.
5. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.
6. Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.
8. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on _____ [date],
at _____ [city], _____ [state].

That all the above statements are true to the best of my knowledge.

Signed

Title