



# CITY OF POULSBO, WASHINGTON REQUEST FOR PROPOSALS (RFP)

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## Enterprise Asset Management Software & Services

**RESPONSE DEADLINE: September 21, 2018**

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### SECTION 1: INFORMATION FOR PROPONENTS

#### 1.1 INTRODUCTION

The City of Poulsbo, Washington is soliciting Proposals from qualified vendors for the procurement of hosted Enterprise Asset Management Software (EAMS) which includes software, implementation services, training, and technical support from a single vendor to serve our Stormwater, Sewer, Water, Road, Solid Waste, Fleet, and Building Maintenance divisions within the Public Works Department. It is the intent of the City to purchase a hosted solution that will maximize operational efficiency, simplify cataloging of data and inventorying of assets, support optimization of asset useful life, and provide critical data and evaluation tools for budgetary considerations.

The solution should provide a cohesive, multi-functional, flexible, robust, and integrated system that will increase efficiency, support informed decisions, and support the City's asset management needs as the City grows and as demands and needs become more complex and costlier. User-friendliness is essential for maximizing staff efficiency and usage by numerous and various types of users. Technical support options should include email, phone, live chat, and remote assistance. An on-line knowledge base is highly desirable. The system should be cloud-based with an option for on-site hosting.

Proponents shall complete a Proposal and submit it to the City on or before the deadline established in this RFP, based on the services described herein.

## **1.2 BACKGROUND**

The City of Poulsbo, with a population of 10,510, is in the northern part of Kitsap County on the shore of Liberty Bay and is 4.5 square miles in area. It is situated at the crossroads for west Puget Sound and is the hub for commuting workforces to Seattle and Puget Sound naval bases and access to other West Sound cities and beyond, including an entrance point for access to the Olympic Peninsula of western Washington. Poulsbo serves as the North Kitsap commercial, employment, and residential center.

### CITY ASSETS

The City of Poulsbo Public Works Department is responsible for the operation, maintenance, preservation and improvement of:

- 67 miles of water mains with associated components, such as pressure reducing facilities, hydrants, wells, and water tanks
- 19 miles of stormwater piping, 2496 catch basins, 157 stormwater treatment and flow control facilities, such as ponds, vaults, and biofiltration components
- 27 miles of gravity and force main sewer piping, 9 sewer lift stations
- 57 miles of roadway, 4 miles of roadside ditches, 45 miles of shoulders, 66 miles of sidewalks, 3050 signs, and various other roadway appurtenances such as traffic signals, speed/radar instruments, street lighting, pavement markings, and guardrail
- 15 parks totaling 137 acres with over 5 miles of trails

The Public Works Department is also responsible for vehicle and equipment fleet maintenance, solid waste collection, and building and grounds maintenance.

### CURRENT DATA MANAGEMENT

The City of Poulsbo manages its assets and data on paper and electronically using forms, spreadsheets, and GIS mapping.

## **1.3 VENDOR REQUIREMENTS**

The City is seeking a complete response from vendors who can demonstrate that they possess the organizational, functional, and technical capabilities to perform the services, and meet or exceed the requirements and service levels specified herein.

Vendors submitting in response to this RFP must meet the following requirements:

- Possess a solid Customer base utilizing the Vendor's software.
- Demonstrate successful experience implementing the proposed software.
- Meet all functional and technical requirements stated within this RFP using commercial off-the-shelf software.
- A highly intuitive system from a user perspective and can position the City to take advantage of technology to improve departmental performance and efficiency.
- Easy access to the data for report and query generation without the need for a programming specialist.
- Provide solutions for user-friendly mobile technology for field crews, integrating mobile devices for both Apple and Android based products.
- Provide spatial capabilities through industry-standard GIS to augment Operations Management activities, including integration with existing geodatabase and referencing systems.
- Asset tracking for specific assets, including the ability to track attributes, work and maintenance history, cost of maintaining the asset, and asset lifecycle management.
- The successful vendor shall be responsible for the final City-approved design, installation, implementation, and commissioning of the software system including development of user acceptance testing, system integration, and connectivity to existing resources.

#### **1.4 KEY FUNCTIONAL OBJECTIVES**

The following is an overview of the essential software capabilities/requirements:

##### *Request Management*

- Intake requests from citizens and staff
- Provide multiple ways to take requests (smartphone, phone, website, etc.)
- Provide a way to avoid duplicate or redundant requests
- Associate multiple tasks and work orders to requests

##### *Work Management*

- Create and complete work on both assets and non-assets
- Easily create, assign, prioritize, and complete work activities
- Roll-up of work activities for project level costing and tracking
- Project activities with their cost, to maximize the live of assets
- Auto notification via email related to assigned and completed work

### Asset Management

- Ability to create asset inventories and track asset attributes
- Assets contain performance curves to track asset condition, criticality, and useful life
- Document inspection results which impact asset condition
- Setup preventative maintenance schedules on assets and trigger work based on asset condition, time, and usage
- Ability to create custom assets
- Associate asset to requests and work

### Resource Management

- Ability to track labor, equipment, and materials costs
- Allow for multiple labor rates
- Ability to expense equipment in either time or miles
- Materials inventory management with quantity on hand and adjustable settings
- Manage materials based on location
- Bulk order, order tracking, and material location transfer
- Auto notifications via email for material reorder alerts

### Mobile/Field Access

- Native iPad application to perform request tracking, work, and inventory assets in the field
- Native iOS and Android smartphone application to perform work and inventory assets in the field
- Mobile application must be able to create and complete work, enter resources, create assets, and edit existing assets and attributes
- Offline capability for iPad application
- Configure data available in application
- Ability to use a variety of base maps

### Reporting and Exporting Data

- Standard reports included
- Create and Edit Reports
- Allow for export to CSV
- Ability for field-level queries, sorts, and reports.
- Ability to present various report or query information in GIS.

- Ability to create “maps” based on pre-defined, or filtered criteria.
- Real-time data updates, preferably Cloud storage.

#### Data Integration

- Integration of data between various existing databases so that data can be viewed by staff in other divisions without having to log into another system.
- Capture and conversion of historical data.
- Interface with existing systems prior to new system implementation.

## **SECTION 2: INSTRUCTIONS TO PROPONENTS**

### **2.1 PROPOSAL DOCUMENTS**

To be considered complete, Proposals must include the items described in the following subsections 2.1A, 2.1B, and 2.1C.

#### **2.1A Company Background, Executive Summary, System Functionality, Recommended Solution, and Costs**

##### Company Background

Vendors shall provide the following company background information:

- Size
- Location
- Number of years in business
- Number of employees
- Peer group installations for comparison
- Installation references with contact information
- Support hours of operation and methods used (phone, chat, web etc.)

##### Executive Summary

Vendors shall provide an executive summary written in non-technical language to summarize the overall capacity and recommended approaches for an EAMS, based on the needs described in this RFI.

##### System Functionality

Vendors should describe anticipated implementation strategies for an EAMS meeting the Department’s needs, including a recommended rollout strategy and potential project plan indicating timeframes for phases, as well as the entire project.

### Recommended Solution

Vendors should provide detailed information on their proposed solution(s). The information should include recommendations taking into consideration the Department's existing processes, data management methods, and system requirements. Describe how your solution would satisfy the Department's EAMS needs based on provided background information, requirements, current processes and recommended implementation strategies.

### Costs

Vendors should respond with typical costs for similar implementations. Typical costs should be broken down for software procurement, implementation, maintenance and support, and other system and business costs (i.e., hardware, application software licenses (initial and on-going), third party licenses, etc.). If the proposed solutions are modular in nature, please provide typical costs for each module offered. Describe any suggestions for opportunities to reduce costs for this project. Provide annual costs after implementation.

## **2.1B Vendor Questions**

Vendors should specifically respond to each of the following questions:

1. Identify which specific functional requirements, described in this RFP, can be addressed by your product. Explicitly flag any requirements that cannot be met or that would be cost prohibitive.
2. Describe system functionalities that your product provides that the City of Poulsbo has not listed but should be a consideration.
3. Describe how your system integrates historic data from management systems operated prior to the launch of the system (i.e., is there a data migration process to move data to the new system or is the recommendation to leave the previous system operational to support data integration?) and describe the anticipated complexity of this effort.
4. Describe architecture used to develop and host your application. Describe programming languages, application layer, database layer, web services layer.
5. Describe how your system leverages GIS to satisfy requirements for work assignment and completion, personnel and team assignment, equipment assignment and scheduling, and asset maintenance scheduling.
6. Describe your company's approach to software revisions, updates and patching.

7. What is your change management process for on-premise vs hosted (cloud)?
8. For on-premise solution describe any limitations or negative implications from utilizing VMware virtualization for server resources.
9. Assuming cloud solution, describe your system methods to acquire/download City data for analysis and reporting.
10. Describe data conversion issues with your product typically encountered with installation, man-hours to complete, and database/data resolution based on prior system conversions.
11. Describe staffing plan to implement, train, support and administrate your proposed solution. Identify key roles and responsibilities. Include both vendor and City resources.
12. Describe your system methods used to attach and store media files associated with work activity.
13. Describe the security architecture used by your system, including user account access control, log in and password requirements, and protection of any connected SCADA systems.
14. Describe your systems capability to utilize mobile devices for data creation, attribute read and update activities in connected and disconnected environments.
15. Describe how your system tracks labor hours, equipment charges and materials incorporated for a specific asset, work code, work order and roadway.
16. Describe how your system supports decisions relating to defined level of service criteria for each asset inventory feature?
17. Does your system include 24/7 customer service operation to minimize downtime. This system will be considered critical for The City of Poulsbo services and response.
18. How are customers managed within your system? Can they be classified internal? External?
19. How are requests for service managed within your system? How configurable is this functionality? How are duplicate requests managed?

20. Is your product scalable (i.e. if you have multiple modules/components, can they be used independently)?
21. To what extent is your solution customizable and what level of skill and training is required to do so?
22. Does your solution allow for Map Services to be hosted either through AGOL service or locally?
23. Does your solution provide a map interface with the capabilities to view assets, search, pan, zoom etc., and access asset attributes? Other capabilities?
24. How does your solution interface support associating assets (single or multiple) with specific work activities?
25. How does your system publish work activities for ArcGIS consumption?
26. Describe how data backup is provided
27. Describe availability of backup data for download.

#### **2.1C Software Capabilities**

Vendors should respond to each of the items listed in the Functionality Matrix in **Appendix A** of this RFP.

## **2.2 SCHEDULE**

The City intends to contract for the software and services before December 31, 2018.

## **2.3 SUBMISSION OF PROPOSALS**

Submit one (1) original paper document and one (1) electronic copy in PDF format. The original paper document shall be postmarked no later than Friday, September 21, 2018. The electronic copy shall be received no later than Friday, September 21, 2018. Both versions are required. Faxes and late responses will not be accepted.

Deliver the original paper Proposal by mail, courier, or hand delivery to:

ATTN: Anja Hart  
City of Poulsbo  
200 NE Moe St.  
Poulsbo, WA 98370



Submit the electronic copy to: [ahart@cityofpoulsbo.com](mailto:ahart@cityofpoulsbo.com)

Technical literature and promotional materials should not be submitted at this time. All Proposals and accompanying documentation will become the property of the City of Poulsbo and will not be returned.

## **2.4 BASIS OF AWARD**

The City will select the Proposal that, in its opinion, is in the best interest of the City. The City will base its choice on considerations including, but not limited to, overall clarity and quality of the submission, vendor viability, strength, and experience, vendor ability to meet functional and technical requirements (including the work associated with implementation, technical services and support), and initial, on-going, and known and potential additional costs.

The City reserves the right of evaluation and the right to determine the methodology for evaluation of the Proposals to determine the best Proposal. The most qualified Proposal will not necessarily be the Proposal with the lowest cost.

The City reserves the right, at its sole discretion, to reject the Proposal of any or all Proponents if the City believes that it would not be in the best interest of the City to make an award for any reason, which may include because the Proposal is nonresponsive, non-conforming, conditional, or because the Proponent fails to meet any other pertinent standard or criterion established by the City. The City reserves the right to waive any or all informalities and/or minor technicalities.

**All questions related to this RFP shall be in writing and directed to:**

[ahart@cityofpoulsbo.com](mailto:ahart@cityofpoulsbo.com)

or

ATTN: Anja Hart, City of Poulsbo, 200 NE Moe St., Poulsbo, WA 98370.

**Replies will be made after September 4, 2018.**

The City of Poulsbo assumes no financial responsibility in connection with vendor costs incurred in the preparation and submission of the RFP packets, nor shall it constitute a commitment, in any way. The City of Poulsbo reserves the right to cancel this RFP if it is deemed in the best interest of the City to do so.

## **2.5 PUBLIC DOCUMENTS AND DISCLOSURE**

Submittals are considered public information once opened by the City. Only under limited circumstances can submittal information be considered proprietary and not subject to disclosure. In no case can the Proponent indicate that their entire submittal is proprietary, and the City shall make the sole determination of what information may be considered proprietary based upon the City interpretation of the Public Disclosure laws.

## **2.6 NONDISCRIMINATION**

The City of Poulsbo does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in employment or provision of services.

## Appendix A

### FUNCTIONALITY MATRIX

- Placing a “Y” in the Core column indicates that the functions are contained in the core system.
- Placing a “Y” in the Custom column indicates that a custom modification will be required.
- Placing a name in the “3<sup>rd</sup> Party” column indicates that the function(s) will be provided by the 3<sup>rd</sup> Party software named.

Asset Information / Reporting / Accessibility of Information	Core	Custom	Named 3 <sup>rd</sup> party
Ability to correlate various tracking numbers to assets, (i.e. work orders, work codes, part numbers, employee numbers, equipment numbers, road log number, bridge name and number, condition ratings, etc.)			
Ability to track labor, equipment and materials (LEM) utilized towards an asset(s), on a daily basis.			
Ability to generate employee timecards.			
Ability to track employee names, employee location, pay rates.			
Ability to query and filter all fields within the system for quick reporting.			
Ability to develop customized reports and queries.			
Ability to generate work plans and budgets, and to produce reports of budgetary expenditures.			
Ability to provide asset financial and replacement analyses for planning and budgeting purposes.			
Ability to manage assets from multiple divisions (i.e. Traffic, Stormwater, Sewer, and Road Maintenance)			
Ability to restrict access, or permissions based on user roles and responsibilities.			
Ability to run reports based on highlighted, or “heat spots” on map			
Ability to track asset type, model, vendor, warranties, installation year.			
Ability to run reports that link cost (LEM) to unit of measure for work completed			
Ability to track and manage facilities maintenance.			
Ability to display work order activities on a map.			
Ability to manage material inventories at various locations.			

Ability to develop thresholds trigger alerts (i.e. vehicle collisions)			
Ability to link as-built drawings, photos, videos, permit information, resolutions/ordinances to assets			
Ability to generate before/after vehicle collision reports			
Ability to correlate traffic “ballbank” information to roadway signage data			
Ability to automatically notify and schedule when violation letters need to be generated (e.g. illicit discharges).			
Ability to transfer existing data to new EAMS without high degree of data manipulation.			
<b>Scheduling</b>	<b>Core</b>	<b>Custom</b>	<b>Named 3<sup>rd</sup> party</b>
Ability to create annual maintenance schedules based on asset condition and defined levels of service.			
Ability to create daily dispatch schedules for multiple crews, including LEM.			
Ability to customize schedules based on predetermined routine or prioritized maintenance intervals			
<b>Mapping/GIS</b>	<b>Core</b>	<b>Custom</b>	<b>Named 3<sup>rd</sup> party</b>
Ability to display asset data in GIS, including the ability to overlay various map layers from each division.			
Real time display of work being performed (i.e. Telematics, GPS locators on vehicles)			
Perform GIS analysis (i.e. heat maps, proximity analysis, field calculations, buffering, etc.)			
Ability to present various report or query information in GIS.			
Ability to create maps based on pre-defined or filtered criteria (at user level).			
Provide map symbolizing for various assets			
GPS data collection for all assets			
Collision mitigation tied to work orders on map			
Show specific symbols tied to collision type on map			
Include sewer permits on map			
Creation of accessible and user-friendly maps for public viewing (i.e. Average Daily Traffic, Level of Service, Sewer permits, etc.)			

<b>Other Interfaces</b>	<b>Core</b>	<b>Custom</b>	<b>Named 3<sup>rd</sup> party</b>
Reliable, easy way to connect TV van inspections or stormwater and sewer assets to main database system			
Ability to interface with SeeClickFix.			
Ability to interface with MS CRM and to tie CRMs to a location/asset for dispatch.			
Ability to manage internal accounting and billing			
Ability to interface with payroll systems			
Ability to interface with inventory system (materials and equipment)			
Ability to interface with a Pavement Management System.			
Ability to interface with Bridgeworks.net			
<b>Field Devices</b>	<b>Core</b>	<b>Custom</b>	<b>Named 3<sup>rd</sup> party</b>
Ability to utilize mobile devices to download and upload data while in the field.			
Ability to integrate with mobile devices for both Apple and Android based products.			
Real time updates when entering data with tablets in the field.			
Voice actuated recognition data entry (Safety-prevents typing while driving)			
System accepts GPS device for inspectors			
Ability to access asset video or other asset documentation in the field.			
Ability to work off-line when 4G connection is not available, with automatic update when back in service.			
Ability to geo-locate a user in the field.			

- End of Document -