



Request for Proposals

For

Construction Project Management Software for Facilities Division



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Section 1: General Information

Request For Proposals (RFP) – Construction Project Management Software for Facilities Division

THE ABOVE DESCRIPTION MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE. **THIS IS NOT AN ORDER** .

PROPOSALS MUST BE <u>RECEIVED</u> NO LATER THAN: Wednesday, August 11th, 2021, at 5:00 pm (MST)		RFP INITIATIVE: Construction Project Management Software for Facilities Division
<ul style="list-style-type: none">• All suppliers must respond in detail to each element of this RFP in order to be considered for contract award.• All proposals must be mailed or emailed to contact person at the address below.• No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.• If pricing has been requested, it must be in a separate sealed envelope or emailed under separate cover and “Construction Project Management Software for Facilities Division RFP Confidential Pricing” as the subject line.• If proposal is mailed, pricing may be included in a sealed envelope; however,• If proposal is emailed, pricing must be mailed in a sealed envelope or emailed under separate cover and “Construction Project Management Software for Facilities Division RFP Confidential Pricing” as the subject line.• If proposal is mailed, please also include or email an electronic version, minus pricing		
SEND ALL CORRESPONDENCE TO THE CONTACT BELOW:		
City of Billings 4848 Midland Rd Billings, MT 59101	Or	City of Billings P.O. Box 1178 Billings, MT 59103
JOHN CATERINO, FACILITIES SUPERVISOR Email: CATERINOJ@billingsmt.gov PHONE: (406) 855-8454		

210 North 27th Street P.O. Box 1178, Billings, MT 59101



Section 2: Objectives

Introduction and Objectives

This RFP is issued by City of Billings (City) for the purpose of obtaining information and pricing regarding a Construction Project Management Software. It is the intent of the City to review and assess the RFP responses to determine which proposal best meets the needs of the City.

Suppliers are expected to provide their best and most competitive proposal.

Attachment F, the Intent to Respond form, must be completed and emailed or faxed at least two (2) days prior to the advertised RFP due date.

Section 3: Information for Suppliers

Disclaimer

This RFP does not form or constitute a contractual document. The City shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. The City also will not be responsible for any expenses which may be incurred in the preparation of this RFP. This RFP is not to be construed as a contract or commitment of any kind.

Instructions to Proposers

EXAMINATION OF DOCUMENTS

Before submitting the proposals, the proposer shall:

- (a) Carefully examine the Standards and Specifications as well as all other attached documents;
- (b) Fully inform yourself of the existing conditions and limitations;
- (c) Include with the proposal sufficient information to cover all items required in the specifications.

PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected.



WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal by written request at any time prior to the due date set for receiving proposals.

PRICES HONORED

The proposer must honor their quote for a period of ninety (90) days after the RFP due date.

The prices established from this RFP may be extended to other political subdivisions within the State of Montana solely at the vendor's discretion.

CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

INSURANCE REQUIREMENTS

The proposer certifies that it/they can comply with the City insurance requirements of :

- 1. Workers' compensation and employer's liability coverage as required by Montana law.**
- 2. Commercial general liability, including contractual and personal injury coverage's -
- \$750,000 per claim and \$1,500,000 per occurrence.**
- 3. Automobile liability -- \$1,500,000 per accident.**
- 4. Professional liability in the amount of \$1,500,000 per claim.**

Each policy of insurance required by this Section shall provide for no less than 30 days' advance written notice to the City prior to cancellation.

The City shall be listed as an additional insured on all policies except Professional Liability and Worker's Compensation Policies.

In addition, all policies except Professional Liability and Worker's Compensation shall contain a waiver of subrogation against the City.

Proposer shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Proposer shall maintain workers' compensation insurance coverage for all members and employees of Proposer's business, except for those members who are exempted as independent contractors under the provisions of §39-71-401, MCA.

The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment.

Specific Insurance Requirements for Cyber/Data Information Security:

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The successful Proposer shall purchase and maintain cyber/information security insurance coverage with combined single limits for each wrongful act of \$2,000,000 per occurrence to cover the unauthorized acquisition of personal information such as social security numbers, credit card numbers, financial account information, or other information that uniquely identifies an individual and may be of a sensitive nature in accordance with §2-6-1501, MCA through §2-6-1503, MCA.

If the Proposer maintains higher limits than the minimums shown above, the City requires and shall be entitled to coverage for the higher limits maintained by the Proposer. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.

Such insurance must cover, at a minimum, privacy notification costs, credit monitoring, forensics investigations, legal fees/costs, regulatory fines and penalties, and third party liability settlements or judgements as may be caused by any act, omission, or negligence of the Proposer's officers, agents, representatives, assigns or subcontractors.

Note: If occurrence coverage is unavailable or cost-prohibitive, the City will accept 'claims made' coverage providing the following conditions are met:

1. The retroactive date must be shown, and must be before the date of the contract or the beginning of contract work;
2. Insurance must be maintained and evidence of insurance must be provided for at least three (3) years after completion of the contract of work; and,
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, the Proposer must purchase "extended reporting" coverage for a minimum of three (3) years after completion of work.

SYSTEM SECURITY

Proposer shall ensure systems delivered are adequately secure. For purposes of this RFP, adequate security is defined to require compliance with federal and State of Montana security requirements and to ensure freedom from those conditions that may impair the City's use of its data and information technology or permit unauthorized access to the City's data or information technology.

The City has established control standards and policies that align with the NIST Cybersecurity Framework. The latest revision of NIST SP 800-53 is used for control adherence evaluation established after developing a security categorization utilizing FIPS PUB 199. Thus, Proposer shall provide reasonable proof, through independent audit reports, **security scans of operating systems, code or the technology environment provided;** that the proposed system meets or exceeds federal and State of Montana security requirements to ensure adequate security and privacy, confidentiality, integrity, and availability of the City's data and information technology.

Annual assurance statements shall be delivered to the Contract Liaison. Annual assurance statements must contain a detailed accounting of the security controls provided and must be in the form of a NIST Security Assessment Report or FedRAMP Security Assessment Report.

Prohibited Activities and Spoofing

Licensors and its officers, employees, agents, subcontractors, and affiliated users, shall not violate or attempt to violate the security of the City or State of Montana's network or interfere or attempt to interfere with the systems, networks, authentication measures, servers or equipment, or with



the use of or access to the network by any other user. Such prohibited activity includes (i) accessing or logging into a server where access is not authorized; (ii) unauthorized probing, scanning, or testing the security or vulnerability of the City or State's network or other systems; and (iii) attempting to portray itself as the City or State or an affiliate of the City or State or otherwise attempting to gain access, without authorization, via the network or systems to any account or information technology resource not belonging to Proposer or its officers, employees, agents, subcontractors, and affiliated users. Proposer shall not perform unauthorized spoofing or scanning of any kind, including user account identity. Systems shall not spoof the billings.mt.gov or mt.gov domains or engage in Email Spoofing. Email spoofing is the creation of email messages with a forged sender address. For example, Email spoofing includes creating or sending emails using the City or State's domain.

DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and 7-1-4144, MCA and may be distributed by written request pursuant to Montana's Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by Council. However, one copy of each proposal submitted shall be retained for the official files of the Department and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the City, do not become a public record and shall only be retained for official files.

Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Proposer understands that, if selected, the City reserves the right to provide its opinion publicly and privately regarding the Proposer's performance.

QUESTIONS

Questions regarding the Request for Proposals contents must be sent to the contact person listed in Section 1 no later than 2 business days prior to due date for proposals. The City will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be posted on the City's website and forwarded to all Suppliers who have submitted an "Intent to Respond" form (Attachment F).

Supplier must submit their questions via email using the "Master Q & A" form found in **Attachment E**, and provide, at a minimum, the following:

- Supplier's name, requester, and appropriate contact information.
- The question, clearly stated.
- Specific reference to the applicable Request for Proposals section(s).

RFP Response Submission

Upon the submission of the RFP response, the supplier acknowledges that all information is accurate and complete.

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All proposals must be mailed or emailed to contact person listed in Section 1.

No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.

If pricing has been requested, it must be in a separate sealed envelope or emailed under separate cover and "Construction Project Management Software for Facilities Division RFP Confidential Pricing" as the subject line.

- If proposal is mailed, pricing may be included in a sealed envelope; however,
- If proposal is emailed, pricing must be mailed in a sealed envelope or emailed under separate cover and "Construction Project Management Software for Facilities Division RFP Confidential Pricing" as the subject line.

If proposal is mailed, please also include or email an electronic version, minus pricing, of your proposal.

<u>RFP Process Timeline</u>	<u>Dates</u>
RFP/legal ad done:	07/20/2021
Advertise:	07/23, 07/30/2021
Preliminary Council memo due:	08/26/2021
Proposals must be <u>received</u> by 5:00PM:	08/11/2021
Evaluate and choose:	08/20/2021
Finalized Council memo and contract due:	09/02/2021
Council meeting:	09/13/2021

Section 4: RFP Evaluation and Selection Processes

Initial Evaluation

Proposals received will undergo an initial review to determine:

- Compliance with instructions stated in the RFP
- Compliance with proposal submittal date

Phase II Evaluation

The evaluation of supplier's proposals may include, but is not limited to, the following criteria:

- Experience of Supplier with goods/services required by the City
- Capacity to assume new business
- Perceived ability to meet the City requirements
- Total Cost Competitiveness
- Availability (timetable) for providing goods and/or services
- Breadth of services available
- Company's stability



- Ongoing support
- Reporting capability
- Quality Control Process
- Process Improvements
- Training
- Compliance with the City Terms and Conditions
- Price

The City reserves the right to conduct interviews with all or some of the Proposers at any point during the evaluation process. However, the City may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating firms using the above-stated criteria.

The City also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

Section 5: Scope of Work

Summary

The Facilities Division is looking for procure a construction project management software that will be used for the tracking of medium to large size commercial construction projects.

The software should meet 90% of the below functionality.

1. Project Management
 - a. RFI – centralized log for all project questions
 - b. Submittals – material submittals and approvals
 - c. Punch List – Closeout documents
 - d. Schedule – tagging deadlines and due dates for tasks
 - e. Correspondence – role-based provisioning
 - f. Scheduling and sequencing – gantt chart
 - g. Document repository – ASI, pay apps, plans
2. Financials
 - a. Change Orders
 - b. Budget
 - c. Invoice management
3. Analytics
 - a. Reporting – project data extraction

Questions to be answered by supplier.

1. Tell us about the warranty and support options available to us with your system. Terms, hours of support, support levels, etc.
2. Is there a dedicated customer support rep or account manager?
3. Is the customer support team in-house employees or are they outsourced?
4. How long does implementation take and what is the scope?
 - a. Tell us about the key people that will be part of the implementation team for our project.
 - b. Will implementation require on-site visits or will it mostly be done remotely?
 - c. Tell us about the training you recommend for preparing our staff to be successful with this new product?
 - d. Will the training be done remotely or on-site?



5. How frequent are software updates pushed out?
6. Are there additional charges for updates or is that included in the yearly price?
7. What is the yearly average uptime?
8. What is time to resolve in the event of an incident?
9. How are software problems escalated?
10. What start-up services do you offer?
11. What is included in start-up support?
12. Without including actual pricing, tell us about your pricing structure.
 - a. Is your software sold with an upfront cost and annual maintenance fees or is your software licensed with annual licensing fees?
 - b. Are your costs based on the number of named users, concurrent users, or other?
 - c. Is your software pricing based on the number of facilities or the size of our organization?
13. Is your system locally hosted or cloud-hosted?
 - a. If locally hosted, then:
 - What are the server and storage requirements of the solution?
 - What are the software requirements for the server?
 - Does your solution required services from an outward facing server for mobile application support?
 - How often do support staff need to access the local system and what are your security protocols for doing so?
 - b. If cloud hosted, then
 - Where are the cloud services hosted? By your company? AWS? AZURE? Other?
 - Please describe your backup and disaster/recovery strategy.
 - Are the cloud hosting fees included in the price of the solution or are they separate (actual pricing should only be included on Attachment C)?
 - Do you have a Vulnerability Management Procedure in place to scan your servers for known vulnerabilities, manage patching the systems, and provide reporting if requested.
 - What is the bandwidth recommendation for accessing the cloud services?
 - Is a copy of our data available to the City of Billings if we wished to store a copy locally and/or if our relationship/contract were to end.
14. We require the use of Microsoft SQL database. Does your system store data in Microsoft SQL?
15. How does your solution differ from others in the market?
16. Why should the City of Billings select your solution to meet our Project Management software needs?



ATTACHMENT A

VALIDATION QUESTIONS FOR SUPPLIER

GENERAL INFORMATION

- 1) Company Name
Address:
Contact Name:
Contact Phone:
Contact Email:
Website/URL:
- 2) How many facilities/locations do you have in the U.S? Please list.
- 3) How many years has your company been doing business under this name?
- 4) Total Full-Time Employees.
- 5) Do you have Small Business Administration Status? If yes, can you provide documentation?
- 6) What are your standard payment terms?
- 7) References - Please attach a Word® document with all contact information for at least the following three references:
 - a) New Company (started doing business with them in the past 12 months)
 - b) Retained Company (have been doing business with them for 3 + years)
 - c) Former Company (contract terminated in the past 2 years)
- 8) Can you provide a statement and meet the City minimum insurance requirements of \$750,000 per claim and \$1,500,000 per occurrence, and the City being named as an additional insured?

FUNCTIONALITY

- 1) A certificate of insurance must be provided prior to signing the contract, commencing on the day contract begins. Are you willing to comply with these requirements?
- 2) You must instruct your insurance broker/carrier to notify the City should your coverage change. Are you willing to do this?
- 3) The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment. Are you willing to do this?

QUALITY AND SERVICE

- 1) Do you have a quality assurance program? If yes, please attach a copy.
- 2) Are your employees required to take a mandatory drug test?

LEGAL ISSUES

- 1) Are there any pending lawsuits against your company? If yes, please explain.



ATTACHMENT B

PRICE MATRIX

(to be sent with proposal in a separate, sealed envelope)

Project Management Software	Price
License fees (specify annual or one-time cost)	
Cost per user	
Implementation cost	
Yearly maintenance support	
Cloud hosting fees (if applicable)	
Other additional information about pricing structure, services provided, or details	

I/We acknowledge _____ addendum.

#

Company Name

Date

Contact Name (please print)

Title

Signature of Contact Position

By signing the above, I certify that I am authorized by the Company named above to respond to this request.



ATTACHMENT C

CONDITIONS AND NON-COLLUSION FORM

To receive consideration, this form must be signed in full by a responsible, authorized agent, officer, employee or representative of your firm.

CONDITIONS AND NON-COLLUSION AGREEMENT

We have read and agree to the conditions and stipulations contained herein and to the Standard Terms and Conditions contained on the attached.

We further agree to furnish the services specified at the prices stated herein, to be delivered to the location and on that date set forth herein.

In signing this proposal, you also certify that you have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the due date and time to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

Legal Name of Firm/Corporation

Authorized Signature

Address

Printed Name

City/State/Zip

Title

Date

Telephone Number



ATTACHMENT D

MASTER Q & A FORM

PROJECT: Construction Project Management Software for Facilities Division

Master Q&A	Any questions regarding this Request for Proposals should be submitted according to the process outlined below. The City will make every effort to answer within two (2) days of receiving the questions.
Q&A Process	<ol style="list-style-type: none"> 1. Prepare questions or concerns on the template provided. 2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable). 3. Submit the completed form via email to caterinoj@billingsmt.gov. Attach associated documents as necessary. <p>Please contact John Caterino with any questions regarding this process.</p>

Questions from: _____ Company: _____

Email Address: _____

#	Date	Reference Section	Question or Comment	City Response
1				
2				
3				
4				



ATTACHMENT E

INTENT TO RESPOND FORM

RFP: Construction Project Management Software for Facilities Division
Dated _____

Fax or email the following Intent to Respond form to within two (2) days of RFP date even if your company chooses NOT to participate in the RFP.

To: **City of Billings**
Attn: John Caterino
Fax: 406 855-8454
Email: caterinoj@billingsmt.gov

From: _____	Contact Name
_____	Company Name
_____	Company Address

_____	Phone Number
_____	Fax Number
_____	Email Address

We intend to respond to this RFP by the specified due date:

Yes _____ No _____

_____ Company Name	_____ Date
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_____ Contact Name (please print)	_____ Title
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Signature of Contact Person

By signing the above, I certify that I am authorized by the Company named above to respond to this request.

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ATTACHMENT F

PROPOSER CONTACT INFORMATION

A. Company Contacts

Primary Contact Person (Name):	
Title/Function:	
Address	
Business Hours Phone:	
Fax:	
Internet E-mail Address:	
Name of Person Responding to Request:	
Title/Function:	
Address:	
Phone:	
Fax:	
Internet E-mail Address:	

B. General Company and Financial Information

Company Name:	
Headquarters Address:	
City, State, ZIP	
Headquarters Phone:	
Headquarters FAX:	
Company Owned By:	
Percent % Ownership:	
Years In Business	
Name of CIO	
Name of CEO/President:	