



The City of Yreka

**Request for Proposal
Asset Management System and Operations
Management System**

**701 4th Street
Yreka, California**

November 5, 2018

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Yreka - Our City, Our Community

The City of Yreka was incorporated as a General Law city on April 21, 1857, as a booming mining town. Today, Yreka is a full service city. Services include a Police Department, a Volunteer Fire Department, building inspection, planning, engineering, general administrative services, a community theater and community center facilities for cultural and senior programs. The City also has a Public Works department which manages all City facilities, parks and recreation, and over 50 miles of streets including street lighting, storm drains sidewalks, curbs and gutters. Public Works is also responsible for City drinking water treatment and distribution and wastewater treatment and collection, which are paid for with enterprise funds. The City has 55 full-time positions, approximately 10 regular part-time positions, 20 volunteer fire fighters, and typically 6-12 seasonal employees to serve an estimated 7,800 residents.

Project Overview

Introduction

The City of Yreka Public Works Department ("City") is inviting proposals to acquire hosted services for Asset and Operational Management Software and professional services that will provide the product support, implementation, training and technical services using industry best practices.

The proposal seeks to elicit qualifications of competence and capacity of the respondent firm to perform the work or provide the service described in this Request for Proposals (RFP).

The hosted solution sought will increase efficiency, effectiveness, and productivity that benefits citizens and employees by:

- Improving customer service,
- Maximizing operational efficiency,
- Simplifying cataloging of data,
- Inventorying assets,
- Budgetary forecasting, and
- Optimizing assets' useful life.

The selected vendor will demonstrate a commitment to the continued development of a technologically efficient government that includes resources related:

- To building effective and innovative teams, and
- Efficient processes with measurable, actionable results.

The selected vendor understands and supports the City's efforts in creating a clear and accountable government that engages its citizens.

The selected vendor will be able to provide resources and support in pursuit of technological efficiencies, including, but not limited to, organizational assessments, materials, training, webinars and professional coaching utilizing industry-wide best practices.

System Objectives and Project Scope

The City is issuing this RFP for both an Asset and Operations Management System and professional services relating to its installation, conversion, migration, training, and implementation. The City is looking for an agreement with a single vendor who can provide a turnkey solution with preconfigured software that will meet the complete range of functionality and related services and will be a long-term, stable partner with the City into the future.

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 a response to this RFP must meet the following requirements:

- Possess a well-established customer base currently using the Vendor's software.
- Demonstrate successful experience implementing the proposed software.
- Meet all functional and technical requirements stated within this RFP using commercially available software created for describe purpose.
- Provide an intuitive system, from a user perspective, that will position the City to take advantage of technology to improve departmental performance and efficiency.
- Ensure easy access to the data for report and query generation without the need for a programming specialist.
- Provide solutions for user-friendly mobile technology, "apps" for field crews.
- Provide spatial capabilities through industry-standard GIS to augment Asset and Operations Management activities.
- Ensure asset tracking for specific assets, including the ability to track attributes, work and maintenance history, cost of maintaining the asset, and asset lifecycle management.
- 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 current and future City financial and GIS systems.
- Be able to support a phased-in developmental approach.

The City will consider proposals from single suppliers or from multiple suppliers working as a team. In the event multiple suppliers submit a proposal together, the City expects that there will be one primary contact responsible for the entire implementation of the project and for coordinating the work of the other suppliers.

The following represents an overview of the Cities desired minimum requirements. Proposers are to describe how the firm would meet these functional objectives:

Key Functional Objectives

Request Management

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

Work Management

- Create and complete work on both assets and non-assets, assign, prioritize, and complete work activities

- Ability to query work activities for project level costing and tracking
- Project future activities with their cost, to maximize the life of assets
- Auto notification methods (email, SMS) related to assigned and completed work

Asset Management

- Ability to create asset inventories and track asset attributes
- 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 employee labor hours, 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 iOS/Android 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 iOS/Android 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.

Instructions to Vendors

Submittal Format

Prepare proposals in a simple and straightforward language, with concise delineation of the capabilities necessary to satisfy the requirements specified in the RFP. Do not submit technical literature and elaborate promotional materials.

Focus the RFP response on completeness and clarity of content rather than volume. Failure to conform to the format specified in the RFP may result in the vendor's response being considered a non-response.

Proposers that respond to this RFP are required to submit their proposal in the following format. Strict adherence to the proposal format is required.

Proposal Format and Content

Section	Information to Include
Table of Contents	
Cover Letter	<p>A cover letter should indicate why this offering makes it a better solution than alternatives, and why the solution helps the City become technologically efficient.</p> <p>State the length of time the proposal terms remain firm, which must be a minimum of 120 days from the proposal due date.</p>
Vendor Profile and Executive Summary	Provide a general description of the vendor and an overview of the vendor's proposed solution.
Customer References	<p>Include the following for three (3) references:</p> <ul style="list-style-type: none"> • Contact name and position • Address • Phone • E-mail address • Project description
Product Offering	<p>Provide a summary of the primary components of the proposed product solution, including how the software can help the City with requests, work management, asset management, resources management, reporting, budgetary forecasting and mobile access.</p> <p>Include supporting screen shots. Describe components of any software that are part of an integrated solution, and whether custom programming is required for implementation of these products.</p>
Implementation Methodology	<ol style="list-style-type: none"> 1. Describe your implementation methodology for this project, including significant tasks involved as well as an estimated project timeline. 2. Indicate whether the implementation will be performed by a 3rd party vendor, or whether the vendor supplying the software will also perform the implementation. 3. Describe your experience in dealing with smaller rural organizations, and your firm's approach to these organizations.
System Requirements	Specify hardware and software requirements necessary for adoption of this solution.
Functionality Matrix	<p>Please complete the Functionality Matrix included with this RFP.</p> <ol style="list-style-type: none"> 1. If the proposed software meets the requirement, place an X in the Meets column. 2. Comments can be added in the matrix for any item.

	3. Please leave the boxes in the “City Score” column box blank.
Price & Contract Terms	The City is seeking comprehensive pricing with terms and conditions. Include an executable document. The City is seeking at minimum a three year proposal from the vendor. The City requests that the following be included in the pricing: <ol style="list-style-type: none"> 1. Hosted Deployment 2. Citizen Request portal for smartphones and the web 3. User licenses 4. Work Management 5. Resources Management 6. Asset modules

Submittal Instructions

One (1) hard copy plus one (1) electronic copy (in PDF format) of the entire proposal are required. Proposals are to be delivered to:

City of Yreka

Electronic copy to: mbray@ci.yreka.ca.us

Attn: Matthew K. Bray

Director of Public Works

701 4th Street

Yreka, CA 96097

If the proposal submitted is sealed, indicate on the outside of the envelope in the lower left-hand corner: “RFP – City of Yreka – Asset and Operations Management System”. Indicate the name of the organization submitting the proposal on the outside of the envelope.

Direct all questions regarding this RFP via e-mail to Cynthia Lynch, Project Analyst, at (clynch@ci.yreka.ca.us). Questions will only be entertained until 11/23/2018.

Submit proposals no later than 5:00 PM on 11/29/2018. Proposals will be rejected and deemed nonresponsive if the RFP response is received after the due date. Delays in the delivery are not the responsibility of the City. Respondents are solely responsible for “on-time” submissions.

Event	Date
Release RFP to Vendors	November 5, 2018
Vendor Questions Due	November 22, 2018
Answers to RFP Questions Released	<AS NEEDED for Addenda>
RFP Response Due	November 29, 2018
Notify vendors selected for short list demo	December 3
Vendor Selection	December 21, 2018

Costs for developing proposals in response to the RFP are the obligation of the Proposer and are not chargeable to the City. All proposals and accompanying documentation will become property of the City and will not be returned.

Selected Vendors

Proposals will be evaluated based on (1) overall clarity and quality, (2) vendor viability and strength, (3) vendor experience, (4) ability to meet functional and technical requirements, and (5) cost of ownership. The City reserves the right to select the vendor whose qualifications, in the Cities' sole judgment, best meet the needs of the City.

The City reserves the right to reject or cancel any and all proposals for any reason. Proposals lacking required information will not be considered.

The City will develop a short list of up to three proposers. These proposers will be invited to a Proof of Capabilities (POC) demonstration. The results of the demonstration will be a factor in the final decision of the Cities' evaluation committee.

The City reserves the right to, 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 such discussions is to ensure full understanding of the proposal. Discussions will be limited to specific sections of the proposal identified by the City and, if held, will be after initial evaluation of proposals is complete.

Functionality Matrix

Minimum Requirements Check Sheet for Public Services Operations Management System (OMS)

Please check all that apply and add comments if necessary. Each category is scored.

Company Experience and Software Methodology				
Meets	Requirement	City Score	Max Score	Comments
	Specify years of experience in providing government software solutions for Operations Management.		20	
	Specify number of customers in existing customer base.		15	
	Vendor develops, implements, and supports their own software		20	
	Software is web-based and written in HTML5		15	
	Cross-browser compliant (compatible with Internet Explorer, Edge, Chrome, and Safari)		10	
	Hosted (Cloud) deployment is available		10	
	User-centric design (each user can configure their own screens and layout)		15	
	Easy-to-use design and persistence technology that remembers each users settings		10	
	One-click navigation between associated request, work, asset, and resource records		10	
	Ability to have two-way integration with Esri using ArcGIS Online		20	
	Notification via email for GIS Integration or schedule process related to other integration issues		10	
	Provide an API		10	
	Integrate with other operations management related-software (fuel, meter reading, financial, etc.)		15	

Company Experience and Software Methodology				
Meets	Requirement	City Score	Max Score	Comments
	Add and view attachments to requests, work, assets, inspections, and resources (.jpg, .png, video, .doc, blueprint)		10	
	Ability to use a variety of web maps or basemaps.		10	
	Offer technical support options of email, phone, live chat, and remote assistance		5	
	Provide a centralized knowledgebase with help topics, training videos, templates, and feature documents		5	
	Provide detailed content and resources for each product versioned release		5	
	Offer opportunities to interact with vendor staff including but not limited to webinars, user conferences, trade show presentations		5	
	Provide a centralized knowledgebase with articles, videos, customer stories, infographics, and white papers		5	
	Ability to create documentation collections for onboarding		5	
	Provide service packages for implementations, system expansions, and system function refresher trainings		5	
	System administrator driven access and denial of features and functionality to user or groups of users		10	
	Includes a dashboard of various request, work, and asset metrics with basemap selection and configurable refresh rates		15	
	CATEGORY SUBTOTAL		260	

Request Management				
Meets	Requirement	City Score	Max Score	Comments
	Ability to take requests from phone, walk-in, smartphone, and website		15	
	Interface to take requests from both internal staff and citizens, including taking a request from a mobile application		10	
	Ability to associate duplicate request calls to the same request		10	
	Ability to view request and requester locations on a map		10	
	Ability to mark requests from phone, walk-in, smartphone, and website as anonymous		5	
	A single request can have multiple tasks or work orders associated to each		10	
	Includes a library of industry standard request issues with ability to add and edit the library		10	
	Notification via email when new request is received		5	
	Notification to requester via email when the request is received and closed		10	
	Compatible with Open311		10	
	CATEGORY SUBTOTAL		95	

Work Management				
Meets	Requirement	City Score	Max Score	Comments
	Ability to create work on both assets and non-assets		10	
	Ability to create non-asset tasks without a location being required		5	
	Ability to group multiple tasks into a work order for cost and progress-level tracking		15	
	Create repeating work orders on a scheduled basis, and the tasks can be both asset specific or non-asset related, or a mixture of each		15	
	Assign a priority to a task and work order		5	
	Efficient and straightforward process for creating tasks, including selecting assets from a map		5	
	Assign tasks to a worker and a group of people		5	
	Automatic email notifications when a task has been assigned to a worker		5	
	Easily reassign tasks from one worker to a different worker		10	
	Ability to view suggested activities based on budget and asset condition		10	
	Notification via email when work associated to a request or project is completed or canceled		10	
	CATEGORY SUBTOTAL		95	

Asset Management				
Meets	Requirement	City Score	Max Score	Comments
	Pavement asset module with the capability of doing PCI inspections		5	
	Signs asset module with the capability of doing Retroreflective inspections		5	
	Signs asset module with a Manual on Uniform Traffic Control Devices (MUCTD) library		5	
	Tree asset module with the capability of doing tree appraisals		5	
	Trees asset module with a tree library		5	
	Asset modules related to Parks and Recreation including but not limited to benches, athletic fields, and landscaping.		10	
	Asset modules related to Storm networks including but not limited to Storm Basins, Storm Manholes, and Storm Pipes		5	
	Asset modules related to Water networks including but not limited to Water Hydrants, Water Laterals, Water Mains, and Water Valves		15	
	Asset modules related to Facilities including but not limited to Lighting, Roofing, and HVAC equipment		10	
	Asset modules related to Signals including but not limited to cabinets, controllers, heads, and monitors		5	
	Asset modules related to Sewer networks including but not limited to facilities, manholes, pumps, and laterals		5	

Asset Management				
Meets	Requirement	City Score	Max Score	Comments
	Asset modules related to transportation including but not limited to sign, pavement, markings, and lighting		5	
	Setup preventative maintenance activities on assets based on asset condition, time, and usage		15	
	Assets have performance curves, prediction groups, criticality, and an estimated useful life		15	
	Asset inspections have configurable inspection condition categories and the inspection condition can be a weighted average of the categories		15	
	Each asset has a task history section for easily seeing past work performed on the asset		10	
	Associate work to an asset and view the total cost of maintaining the asset		5	
	Associate requests to an asset and view the total cost of maintaining the asset		5	
	Every asset has its own unique set of attributes that can tracked and edited		5	
	Ability to create custom asset modules		10	
	Configurable inspection rating methods per asset module condition categories (5 star, index, number, etc.)		15	
	Provide functionality to structure asset modules as linked networks or in a parent-child-grandchild relationships		10	
	CATEGORY SUBTOTAL		185	

Resource Management				
Meets	Requirement	City Score	Max Score	Comments
	Laborers can have multiple rate types (Standard, Overtime, FEMA, Holiday, etc.)		10	
	Each piece of equipment can be expensed in either time or miles		10	
	Proactive maintenance scheduling based on time, condition, and usage for equipment		10	
	Materials can be inventoried and quantity used deducted from the quantity on hand		10	
	Automatic email notifications based on material reorder points		10	
	Workers can easily enter resources like labor, equipment, and materials used from a field list		10	
	Location-based material management		10	
	Materials ordered in bulk, order tracking, and bulk material transfer		10	
	Ability to distribute multiple labor, equipment, and material records across tasks and assigned to the associated assets		20	
	CATEGORY SUBTOTAL		100	

Mobile/Field Access				
Meets	Requirement	City Score	Max Score	Comments
	Native iPad/Android mobile application		10	
	Native iPad/Android mobile application with Offline functionality		5	
	Native smartphone mobile application for iOS and Android		10	
	Choose from a variety of basemaps on the application		10	
	Ability to complete and assign work from the application		10	
	Enter resources from the application, preferably from a field list		5	
	Create point, linear, and polygon asset types on the application leveraging the onboard or external GPS		25	
	Edit existing asset's location and attributes on the application		20	
	View and edit requests		10	
	Create work from specific assets on the application		10	
	View and add attachments to assets, requests, inspections, and tasks on the application		15	
	Choose what assets display on the application		5	
	CATEGORY SUBTOTAL		135	

Reporting & Exporting Data				
Meets	Requirement	City Score	Max Score	Comments
	Software offers reports standard with implementation for requests, work, assets, and resources.		5	
	Users can create custom or ad-hoc reports. If yes, please specify the report engine		10	
	Software allows the user to sort and filter specific data and then import the data as a CSV file		15	
	Software allows the user to sort and filter specific data and then export the data as a CSV file		15	
	Ability to report, sort, and query on any field		25	
	Ability to see ad-hoc reports in a table view and as whole data sets or by record		15	
	System is built to visualize data right on the screen throughout the system		20	
	CATEGORY SUBTOTAL		105	

Category	City Score	Max Score	Comments
Company Experience and Software Methodology Subtotal		260	
Request Management Subtotal		95	
Work Management Subtotal		95	
Asset Management Subtotal		185	
Resource Management Subtotal		100	
Mobile/Field Access Subtotal		135	
Reporting and Exporting Data Subtotal		105	
Implementation Price			
VENDOR GRAND TOTAL		XXX	