



REQUEST FOR PROPOSALS

For

Work Order Management and Asset Inventory Software Solution

Issued By:

St. Charles Parish Department of Public Works
100 River Oaks Dr.
Destrehan, LA 70047

REQUEST FOR PROPOSALS

P160502 COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM

Presently there is a strong desire for an asset management software system that has the ability to track long term infrastructure costs, repairs, and lifecycles. The Parish recognizes that it is extremely important to know where assets are, when they are being maintained and what it costs to maintain them. The St. Charles Parish Department of Public works is requesting Proposals from qualified vendors to provide a CMMS work order management & asset tracking system. The project will include, but is not limited to: developing a comprehensive Computerized Maintenance Management System (CMMS). The CMMS will allow users in various locations to access to a work order management and inventory tracking system. In addition, the CMMS will provide open standards technology allowing for access to data and reporting for several types of analysis.

For additional information or to obtain a copy of bidding documents in their entirety please see: <https://www.centralauctionhouse.com/>, <http://www.stcharlesgov.net/> , or contact: Meme Robbins at 985-783-5102 or mrobbins@stcharlesgov.net.

Sealed proposals must be submitted to the St. Charles Parish Public Works Directors Office, 100 River Oaks Dr., and Destrehan, LA 70047 at or before 11:00 A.M., JUNE 28, 2016.

Proposals received later than the time and date specified will not be considered.

The Parish reserves the right to reject any/all Proposal(s) or accept what is, in its judgment, the Proposal which is in the Parish's best interest. The Parish further reserves the right, in the best interests of the Parish, to waive any technical defects or irregularities in any/all Proposal(s) submitted.

The Proposal must be placed in an envelope securely sealed therein. The envelope should be labeled with: firm's name, occupational license number, & remittance address & titled: "**SEALED CMMS PROPOSAL FOR ST. CHARLES PARISH PROJECT NUMBER P160502.**"

Advertisement Sources:

- St. Charles Herald Guide
 - St. Charles Parish Website
 - Central Auction House
 - The Advocate
 - The Times Picayune
- Week of: June 2, 9, & 16, 2016



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I. Preface:

The St. Charles Parish Department of Public works is requesting Proposals from qualified vendors to provide a CMMS work order management & asset tracking system.

The final outcome of the project will be a Professional Service Contract for the creation of a software solution that will allow users to access an effective & efficient tool that will provide a friendly environment for the creation and management of service requests, inspections, and reactive/preventive maintenance work orders as well as provide management with a valuable reporting tool for Asset (Facility, Fleet, Employee, & Equipment), Work Order, and Project Management.

II. Background:

Presently there is a strong desire for an asset management software system that has the ability to track long term infrastructure costs, repairs, and lifecycles. The Parish recognizes that it is extremely important to know where assets are, when they are being maintained and what it costs to maintain them.

The parish is seeking to go to the next level with a software solution that will provide the ability to track and manage infrastructure service requests, repair work orders, asset inspections, infrastructure lifecycles, and citizen reported concerns. The department needs software that is user friendly and allows administrators to create, modify, adapt, and assign Work to Assets & it's respective hierarchy.

III. Project Overview:

The Parish is seeking to identify software solutions that offer variable levels of Interface for multiple users and that enable staff to track and manage infrastructure assets, service requests, work orders, inspection reports and citizen concerns through a centralized database of information.

The Parish is seeking to find a CMMS that is capable of:

- providing a scalable solution that enables complete asset management, inventory management, work management and call center capabilities,
- supporting the organization of information in Parish-defined hierarchal levels,
- defining work flow capacities to automate the work order process,
- having flexible templates to assist users in asset maintenance cost development, and work assignment,
- providing document management and retention for all documents related to a specific Parish asset,
- tracking resources and costs associated with staff, vehicles, tools, materials, etc.,

IV. Scope of Work:

A key requirement of Proposers will be to review and expand on this Scope of Work in their specific approach as necessary to demonstrate the full range of services and system functionality that will be provided. Proposers shall be responsible to respond to all requirement aspects of this Request for Proposals (RFP). This section should be considered as an outline of the minimum standards anticipated. The Proposer is responsible to ensure all aspects of the project concepts and system performance requirements are incorporated into their submitted proposal. The scope of services to be performed by the Proposer shall include but is not limited to the following groups of services;

- providing a customized software package particular to St. Charles Parish Public Works and ability to integrate with existing systems,
- providing a CMMS interface that allows end-users to track, manage, analyze and report on assets across various fields that includes a comprehensive Asset Based Work Order Management and Inventory Tracking System,
- creation of a database that captures information for future use,
- ensuring full system implementation and training for end-users.

The parish will supply information requested by Proposers. Included in Exhibit A is a basic Asset Tree & Hierarchy. Please specify additional data, required from the Parish in your proposal.

Proposal Requirements:

Proposers are to submit six (6) copies of the Proposal in accordance with the requirements set forth within this RFP. In addition, an electronic version of the proposal needs to be provided. The information included should be as concise as possible. Late Proposals cannot be accepted and will be returned unopened to the Proposer.

All Proposals must follow the format outlined below. Failure to do so may result in disqualification.

1. Description and history of company, including year established.
2. Type of ownership and parent company, if any.
3. A one page narrative describing the firm's interest, particular abilities, and qualifications related to the work outlined in the Scope of Work.
4. Number of applications in use and representative installations.
5. History of release schedule/new versions and planned upgrades.
6. Where and how the application runs and is administered, hardware requirements and security features.
7. Qualifications and experience with projects of similar type.
8. Implementation process, timing and team.
9. Two cost proposals: for system acquisition **and** software as service (ASP).
 - Each of these proposals should include cost for **10** concurrent, **50** concurrent users, and **unlimited** users.
10. Cost proposals should include identification of specific tasks and proposed costs per task and other associated costs such as hardware, training, support and maintenance.
11. Timelines and schedules for performance of each task and proposed acceptance criteria. (assume August 1, 2016 for the date of the notice of award)
12. At least three references of clients the firm has completed similar implementations for within the last three years, preferably municipalities.
 - Please include contact information for each reference (name address, phone and e-mail).
13. A sample of the work product from a similar project. This could include screen shots of interface pages.

The final outcome of the project will be a Professional Service Contract for the creation of a software solution that will allow users to access an effective & efficient tool that will provide a friendly environment for the creation and management of service requests, inspections, and

reactive/preventive maintenance work orders as well as provide management with a valuable reporting tool for Asset (Facility, Fleet, Employee, & Equipment), Work Order, and Project Management. The aforementioned Professional Service Contract will be executed on the St. Charles Parish Standard Professional Service Contract Documents (Standard Contract documents shall be made available upon request.. Compensation shall be percentage completion with specified benchmarks as follows or as negotiated at the time of Contract Creation:

- 5% - NOTICE TO PROCEED
- 35%- ASSET IMPLEMENTATION (Program ready pilot program)
- 30%- INITIAL IMPLEMENTATION (Pilot Program)
- 20%-DEPARTMENTAL IMPLEMENTATION (All training complete program fully accessible)
- 10%-FINAL ACCEPTANCE

Evaluation:

Proposals will be evaluated and scored by an evaluation committee. Proposers with the highest combined scores of the Technical and Cost categories will be invited for an interview and product demonstration. A score will be assigned to the interview and product demonstration, then combined for the summary score and ranking.

- **Technical proposal** – Includes ability to meet the criteria outlined in this RFP, past experience providing similar solutions to comparable clients, and input from references.
- **Cost** – Includes pricing for purchase/licensing, support, training, and maintenance.
- **Product Demonstration-** Includes recommended installation, ease of use (intuitiveness), functionality for end-users, and perceived ability to deliver services.

V. Questions and Answers:

All questions related to this RFP must be submitted either by phone 985-783-5102, or emailed to mrobbins@stcharlesgov.net (preferred method). The question period shall expire as defined in Section VI below.

Answers to questions will not be given after the date specified below.

VI. Projected Timetable

The Parish reserves the right to modify the timeline if necessary.

RFP Available for Viewing	June 2, 2016
Questions Due	5 P.M. June 21, 2016
Answers Due	5 P.M. June 24, 2016
Proposals Due	11 A.M. June 28, 2016
Award Notice	August 1, 2016
Contract Due	August 10, 2016
Contract to Council	August 15, 2016
Implementation Plan Due	October 1, 2016
Work Completed	November 21, 2016
Training Completed	December 31, 2016

VII. Summary

The Parish reserves the right to reject any/all Proposal(s) or accept what is, in its judgment, the Proposal which is in the Parish's best interest. The Parish further reserves the right, in the best interests of the Parish, to waive any technical defects or irregularities in any/all Proposal(s) submitted. Submit Proposals in accordance with the conditions set forth. Late or faxed Proposals will not be accepted.

EXHIBIT A

Software needs to provide the user with the ability to build an asset hierarchy to represent the locations and assets within our organization. Administrators need to be able to easily view and change location of an asset.

Asset Location Assignment

Assets should be accessible within the program. Administrators need to be able create, modify, and adapt Assets & their hierarchy.

Categorical Asset Hierarchy (*how an asset is assigned what appears as the title for the drop down menu*)

- Department
- Subset
- Type
- Location
- Blank
- Address
- Fixed Asset Type
- Fixed Asset

Asset Tree (Hierarchy)- Parish to provide data base(s) for integration

Public Works

- Drainage
 - Pump Stations

Pump stations	Pumps		
	Engine	<i>Motor, sensors, motor controller</i>	
	Fuel System	<i>Tanks, lines</i>	
	Generator	<i>Generator, load bank panel, transfer switch</i>	
	Gear box		
	Electrical	<i>Service (Energy thru Distribution Panel) Soft Starter Panel,</i>	
	Telemetry	<i>PLC panels, level transmitters, cameras</i>	
	Infrastructure/Misc	Discharge	<i>Pipes</i>
		Conveyance	<i>Bar Screens, Culverts,</i>
		Station	<i>Utilities, Slab, Station, Bldg, Equipment</i>
Redundancy		<i>Float Switches</i>	

- Canals
- Structures
- Roads
 - City → street → address # & none listed:
 - *Roadway, Ditch, Sidewalk, Driveway*
- Facilities
 - East Bank Yard
 - West Bank Yard
 - Director's Office

Information Fields For Asset Creation

Location/Address Fields Vary by location. The previous fields simply tell the system what fields

will be required. Also, for the purpose of reports if the data entered at a higher level on hierarchy, it applies to all it's children. These fields are required at asset creation and editable by Parish-Defined Administrators.

Fields needed: User should be able to click on any field and make their selection(s). Their selections will limit the available selections of the other fields and even gray out others. The user should be able to start with any of the branches (meaning department isn't needed to get sub-set. They should be able to go into subset and select "Drainage" and the Department should then populated automatically.

Field Types: Dropdown menus that allow for typing. The available fields for asset entry will vary from asset to asset. There will be fixed fields that apply all the way down the hierarchy. (ie if the parent is district 6 all of the subsets are also district 6).

PROPOSAL PRICE & FEATURES LIST

Official Name of Bidder: _____

Primary Contact: _____

Address (Ln1): _____ Address (Ln2): _____

City: _____ State: _____ Zip Code: _____

Webpage: _____

Type of Entity / Organizational Structure (check one):

Corporation

Joint Venture

Limited Liability Partnership

Partnership

Limited Liability Corporation

Non-Profit / Church

Other: _____

Date of Organization Structure: _____

Federal Tax Identification Number: _____

Primary Contact Information:

Name / Title: _____

Telephone Number: _____ Fax Number: _____

E-mail Address: _____

SIGNATURE: _____

Name and Title of Signer: _____

Dated this _____ day of _____ 20_____

BIDDER NAME: _____

# Concurrent Users	Cost Proposal #1- On-Premise			Cost Proposal #2- Cloud-Based		
	Up-Front	Recurring	Total	Up-Front	Recurring	Total
10						
50						
Unlimited						

Legend for Program Features & Capabilities

In addition to price, the criteria set forth in the Proposal Requirements and any specific criteria listed below will be considered in judging which Proposal is in the best interests of the Parish. One value should be entered in the left column for each evaluation criterion from the following legend. Additional explanation should be provided as needed and should attached to this sheet.

- 3 = Standard, included in the base package with no extra programming.
- 2 = Included, provided by a third party/business partner.
- 1 = Optional, extra programming or cost involved.
- 0 = Not available and cannot be implemented in the proposed version.

Program Features and Capabilities:

Item #	DESCRIPTION	Score
1	User-friendly, interface configurable to facilitate call taking, service request processing and work order generation, within and directed from a GIS environment	
2	Supports simultaneous multi-user access with appropriate record locking to insure data integrity through relational database	
3	System is non-modular for asset types and functional groups. Core system is configurable for any asset type without separate licensed modules	
4	Ability to locate and access to using address location service including GIS centerline	
5	Ability to identify features, display infrastructure assets attributes, asset work history, and any pending work with and without a map	
6	Allows users to select assets & displays asset condition, work history, and pending work information associated to those records	
7	Ability to filter a list of assets or assets found in a geographic area	
8	Capability to search and view Service Request, Inspections and Work Order locations with and without a map	
9	Ability for user to access, maintain and edit asset information directly within the CMMS or indirectly through GIS application	
10	Allows assigned personnel to select and review work requests and work orders using multiple selections and sorting criteria that include all work request and work order fields.	
11	Allow work orders to include multiple assets and asset types. For example all pipes, manholes, roads in a geographic area.	
12	Ad hoc query interface with export to Microsoft Office applications	
13	Ability to create, enter, and display standard operating procedures for certain tasks as attachment or within system	
14	Automatic notification of new work request and work orders to sender and user assigned to receive specific process area	

15	Allows maintenance lead workers to enter preventive or standing maintenance rules that trigger the automatic creation of work orders.	
16	Preventive Maintenance includes elapsed time since the last work order was created or completed	
17	Preventive Maintenance includes asset runtime since the last work order was created or completed (runtime may be interfaced to SCADA, plant control systems or fuel systems).	
18	Ability to schedule seasonal or cycle PMs, for instance, schedule activities "between June-September."	
19	View total Labor hours and labor, material, and tool cost anticipated for a PM.	
20	Includes associated work request ID (with complaint codes, description, location, and contact information) with link between request and work order	
21	Ability to attach multimedia files to work order	
22	Includes parts and equipment required, reserves parts in inventory system, to be used for the work order or for a task within the work order	
23	Includes employees and/or work crews assigned to the work order or a task within the work order	
24	Includes instructions and comments to and from workers	
25	Includes estimated and actual labor and equipment hours and costs associated with the work order or a task within the work order	
26	Allows assignment of Work Orders to Individuals, Crews, or outside Contractors.	
27	Initiates Warranty inspections or new assets of new components.	
28	Allows user to report labor time charged against work orders for a user-defined date range	
29	Provides cost tracking capability that allows each employee's labor costs to be calculated for work orders.	
30	Ability to schedule work by geographic area	
31	Must provide a flexible and open method allowing for the ability to link to 3rd party software, tools or data for asset condition modeling, depreciation and valuation	
32	Will the software track numerous projects that are part of one larger project	
33	Captures and stores for assets the results of various inspections such as flow monitoring, I/I investigations, smoke testing, hydrant flow testing, back-flow preventions device testing, pump efficiency testing, etc	
34	Inspections managed by the application must provide flexibility for user defined fields and forms	
35	Tracks work history on physical assets in which the physical assets are installed (e.g., a work history on a physical pump and also a work history on the place within the plant where that pumps may be installed)	
36	Includes asset lifecycle stage, such as planned, under construction, installed, abandoned in place, removed, removed and undergoing refurbishment, etc	
37	Ability to utilizes a web-based interface option	
38	Feature asset data model is fully user-definable and customizable without vendor support	
39	Inter-operability with Microsoft product suite (Word, Access, Excel, etc.)	
40	Interface directly with email capabilities (Outlook). For example, information from a work request should be easily replicated into an email to send outside of the software	
41	Has open access to data models for user defined attributes seamlessly accessible within work management and GIS	
42	The system shall work with standard SQL based report writers where the user can modify existing reports or create new reports based on specific user requirements	
43	Open System Architecture – Must follow accepted practices for open architecture with well defined, non-proprietary database and interface	
44	Provide Data Dictionary-Non-proprietary feature data model format, including data names, fields, tables, relationships, and other data design elements	
45	Asset model fully user definable and customizable without vendor support	
46	Displays an image of the asset.	

47	The data structure should allow integration with other systems with open databases, points of integration include and/or not limited to Document Imaging-Laserfiche and IBM AS400 System	
48	Ability to provide access to record construction drawings through established hyperlink through the GIS asset information	

References

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

**ST. CHARLES PARISH
INSTRUCTIONS TO PROPOSERS
OF PROFESSIONAL SERVICES**

1. St. Charles Parish has advertised to invite Professionals to submit sealed Proposals as more fully described in the Request for Proposals (RFP). The following instructions have been prepared to assist in the preparation of Proposals. These instructions may be altered by the Parish whenever it is deemed necessary in the best interests of the parish. The Contract will be executed by the St. Charles Parish Council.
2. The Contract Documents for this project shall consist of the following documents:
 - A. RFP (Public Notice and Letters to Potential Submitters).
 - B. Instructions.
 - C. Amendments, if any.
 - D. Proposal submitted by Proposers.
 - E. Notice of Award.
 - F. Professional Services Agreement.
 - G. Scope of Work, if not set forth in the RFP.
 - H. Notice to Proceed.
3. Information contained in the Contract Documents, as completed during the contract award process, shall be the basis for the Proposals, and nothing shall be deemed to change or supplement this basis except for written Amendments issued by the St. Charles Parish.
4. St. Charles Parish reserves the right to reject any or all Proposals or accept what is, in its judgment, the best Proposal. The Parish further reserves the right to waive any technical defects or irregularities in any and all Proposals submitted, and to negotiate contract terms with the Successful Submitter. The Parish reserves the right to disregard all nonconforming, non-responsive or conditional Proposals. The Parish reserves the right to reject a Proposal of a Proposer determined to be not responsible, and further reserves the right to refuse to make an award if it determines it to be in its best interests.
5. Discrepancies between words and figures will be resolved in favor of words. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum. The Parish may waive minor informalities that do not affect responsiveness, are merely a matter of form or format, do not change the relative standing or otherwise prejudice other offers, do not change the scope or meaning of the Request for Proposals, and insignificant, negligible, or immaterial in nature, or do not reflect a material change in the work.
6. The cost of proposal preparation shall be borne solely by the persons or entities submitting proposals.
7. An individual authorized to bind the Proposer to the provisions of the RFP must sign all Proposals.

8. Proposers must disclose any instances where the firm or any individuals working on the Proposal has a possible conflict of interest and, if so, the nature of that conflict. The Parish reserves the right to cancel the award if any interest disclosed from any source could give the appearance of a conflict or cause speculation as to the objectivity of the submitted Proposal.
9. By signature on the Proposal, the Proposer certifies it is in compliance with the laws of the State of Louisiana, all applicable local, state and federal laws, applicable portions of the Civil Rights Act of 1964, the Equal Employment Opportunity Act and regulations, the American with Disabilities Act and regulations, and that the Proposal was independently arrived at, without collusion.
10. Proposals may be modified or withdrawn by an appropriate document duly executed (in the manner that a Proposal must be executed) and delivered to the place where Proposals are to be submitted at any time prior to the opening of Proposals.
 - A. If, within twenty four (24) hours after Proposals are opened, any Proposer files a duly signed written notice with St. Charles Parish and promptly thereafter demonstrates to the reasonable satisfaction of the Parish that there was a material and substantial mistake in the preparation of her/his Proposal, that the Proposer may withdraw her/his Proposal and the Proposal Security will be returned. Thereafter that Proposer shall be disqualified from submitting a Proposal.
11. The Parish shall then evaluate each Proposal in the best interests of the Parish. The proposals shall be evaluated to determine which are the most advantageous to the Parish taking into consideration price and any factors set forth in the Request for Proposal.
 - A. Prior to accepting a Proposal, the Parish may decide to interview one or more Proposers to negotiate final contract terms for inclusion in the Agreement.
12. Upon determining the successful Proposer, the Parish shall send to the Successful Proposer a Notice of Award notifying the recipient of the Parish's acceptance of the Proposal, subject to the Parish Council approval of the Contract Documents.
 - A. The Notice of Award shall also forward to the presumptive Successful Proposer three (3) unexecuted copies of the Agreement with instructions to execute and return the same to the Parish within ten (10) days or risk having their Proposal declared abandoned.
 - B. Upon receipt of all documents required by the Notice of Award and upon approval of the Agreement by the St. Charles Parish Council, the Successful Proposer shall be sent a Notice to Proceed along with a copy of the Agreement duly executed by St. Charles Parish.
13. There are specific indemnity and insurance requirements which the Successful Proposer must comply with prior to the start of Work for this project. These requirements are set forth in detail in the Agreement. Objections to any of the provisions of the Indemnification and Insurance Requirements must be made in writing by the time and date set for receipt of questions. The successful Proposer must obtain the required insurance coverage and provide proof of coverage as a condition of the Agreement. Failure to provide evidence of required insurance coverage is a material breach and grounds for withdrawal.
14. The submission of a Proposal will constitute an incontrovertible representation by the Proposer that

he/she has complied with every requirement of these instructions and that the Contract Documents are sufficient in scope and detail to indicate and convey understanding of all terms and conditions for performance of the Work.

15. Refer to the RFP for the identity of the parish's project managers who will coordinate all aspects of the selection process. All questions about the meaning or intent of the Contract Documents shall be submitted to the project managers in writing.

16. Proposers shall bear the responsibility for checking the website for all *Project Addendums*. Only formal written Addendums will be binding. Oral and other interpretations or clarifications will be without legal effect.

17. In order to determine if a Proposal is reasonably susceptible for award, communication by the project manager is permitted with a Proposer to clarify uncertainties or eliminate confusion concerning the contents of the Proposal and determine responsiveness to the RFP.

A. Clarifications may not result in a material or substantive change to the Proposal. After receipt of Proposals, if there is a need for any substantial clarification or material change in the RFP, an amendment will be issued. The amendment will incorporate the clarification or change, and a new date and time established for new or amended Proposals.