



Request for Proposal

City of Monrovia Case Management, Facilities
Management and Work Order
Application Replacement

City of Monrovia
Information Systems Division
January 2, 2014

Responses Due January 27, 2014 at 3:00pm

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1. Background

1.1 City of Monrovia

The City is looking for a citywide application system that will replace the functionality of multiple systems. The system will replace the existing case management and work order systems. The City would like to add facility management capabilities as well.

The current case management application is Tidemark. The Tidemark application has been installed for over 12 years and is serving the following departments:

Community Development: Business License, Code Enforcement
Building Permit, Yard Sale,
Design Review Committee Letter,
Planning

Fire Department: Hazardous Materials, Fire Sprinklers

The current work order system is used by Public Works for managing its activities. It is a web based system that runs on a workstation based proprietary database. The system needs to be replaced with a system that can be used enterprise wide.

The City is not using a facilities management system at this time.

The City has 6 facilities linked by 1 GB fiber connections. The City has Windows XP and Windows 7 based workstations with a mixture of Microsoft office versions. The City is expecting to provide a Windows 2012 server along with Microsoft SQL 2012 for the project.

The City has Tyler Technologies Munis financial application system. It also has Hyland Software's OnBase document management system. The Fire Department uses the Firehouse management software.

The City uses ESRI's ArcGIS family of products.

1.2 Software Proposal

The project calls for the acquisition of new software to provide for case management, work orders, and facility management. The functionality can be provided by multiple software products but the applications must be easy to use and well integrated. Where possible, the City would like to integrate the new applications with either or both of the Munis finance system and OnBase document management system.

The case management function will be expected to provide for case management of the following case types at a minimum:

Business Licenses	Code Enforcement
Building Permits	Apartment Inspections
Planning Permits	Administrative Fines
DRC Committee Letters	Grading Permits
Hazardous Materials Inspections	Fire Sprinkler Permits
NPDES incidents	

It is expected that these case types can be developed by trained power users and not just IT or vendor provided staff.

The City is interested in the capability of accepting plans for permits electronically. This desired capability may be implemented in the new system or as part of the existing OnBase document application system.

The work order function will allow for the entry and tracking of work orders on a departmental basis.

The facility management will include industry best practices.

The City would prefer that the data be maintained in a format that could be read or integrated with the City's ESRI software.

1.3 General Information

Vendors responding to this request for proposal are expected to supply the same level of detail in their responses. If the information requested is not provided in its entirety or is not sufficiently detailed, the evaluation team may determine that the proposal does not meet the minimum requirements.

Questions regarding the contents of this proposal must be in writing and directed to :

Mitch Cochran
Information Systems Manager
mcochran@ci.monrovia.ca.us
(626) 932-5561

1.4 Submission of Proposals

Each company responding to this RFP must submit the following in either hard or electronic copy:

Hard copy: Four (4) identical copies of the proposal, including the Cost and Reference worksheet and Feature-Function checklist.

Deliver this proposal package to:
City of Monrovia
Attn: City Clerk
415 S. Ivy Ave.
Monrovia, CA 91016-2888

In the lower left hand corner of the envelope, please indicate:
"RFP Response Enclosed – Due January 27, 2014 @ 3:00 p.m."

Electronic Copy: An email to Bids@ci.monrovia.ca.us

An electronic submittal must be in PDF form and not over 20Mb in size.

The Cost and Reference worksheet and Feature-Function checklist must be submitted as attachments in Excel form.

The electronic submittal is not considered received until you receive a confirmation email from the City Clerk acknowledging that the proposal has been received and is acceptable in its form. Time of receipt shall be based on the time indicated by the City's email server.

The proposals must be received prior to:

Monday, January 27, at 3:00pm

Proposals received after the stated hour will not be considered.

1.5 Contractual Development

The City reserves the right to reject any and all proposals received, to compare the relative merits of the respective proposals, and to choose that proposal or components of those proposals which in the sole opinion of the City will best serve the interest or needs of the City. If a proposal is accepted and selected, the City intends to negotiate and enter into a contractual agreement with the Vendor firm. The content of the RFP and successful vendor's firm proposal will become an integral part of the contract, but either may be modified by the final negotiated provisions of the contract.

1.6 Contract Requirements

Contractual Time Line: The proposed applications are to be installed and in operation by September 1, 2014.

Insurance Requirements:

Any contract shall contain indemnity and insurance provisions substantially in the form of the attached "Insurance Clause" (Appendix). The cost of providing insurance shall be included in the proposal price, and no additional compensation will be allowed. Any requested changes in the Insurance Clause should be submitted in writing and is subject to approval by the City.

1.7 Expenses of Proposal Preparation

Each proposal prepared in response to this RFP shall be prepared at the sole cost and expense of the proposer and with the express understanding that no claims against the City for reimbursement will be accepted.

1.8 Rights of the City of Monrovia

The City reserves the right, at its discretion, to pursue any or all the following actions related to the RFP:

1. Issue addenda to the request for proposal;
2. Request additional information and/or clarification from the vendors;
3. Negotiate a contract solely on the basis of the original proposal(s);
4. Negotiate a contract on the basis of additional information supplied by a vendor;
5. Reject, for any reason, any or all proposals, permit the timely correction of errors, waive minor deviations and technical errors and/or discrepancies and/or waive any informalities in a proposal not affected by law, and accept or reject all or any part of any proposal as may be considered to best serve the public interest and the needs of the City.
6. Issue subsequent requests for proposal or invitations to bid based on the refinement of concepts proposed in response to this RFP.

This Request for Proposal (RFP) is not a solicitation and does not obligate the City of Monrovia to accept any proposal, negotiate with any vendor, award a contract or to proceed with the development of any project proposed in response to this RFP. The awarding of any contract shall be subject to such prior governmental approvals or determinations as may be required or appropriate.

2. Software Proposal

2.1 Software Requirements

The proposal will include responses to the Function checklist. The check list is intended to list items that will be available as part of the proposal, items that are extra cost, items that will be available at a future date or items that are not planned to be available.

- 1 – Feature is part to the proposal
- 2 – Feature is an extra cost to the proposal.

- 3 – Feature is available at a future date
- 4 – Feature is not planned to be available in the near future

The Function checklist is open to additions. A vendor can add additional features to the bottom of any of the requirements pages. The proposed solution should include the following capabilities:

Overall Requirements

- The solution needs to provide the following application modules:
 - Case management
 - Work orders
 - Facilities management
 - Electronic Plan Submission is optional
- The vendor must be capable of providing all the modules, however the vendor can propose multiple applications
- All the modules must be integrated and capable of sharing data.
- The software currently is in production with other agencies in a similar environment.
- The software must be easy to use.

Licensing

It is expected that the application will support the following number of licenses:

- Case management	Named users 25	or Concurrent users	12
- Workorder	15		10
- Facilities:	10		6
- Plan Submission	10		4

2.2 Support Requirements

1. Technical Support
 - a. The vendor must have the capability to provide telephone support during normal business hours, 7:00am to 6:00pm, PST.
 - b. The Vendor must have online E-mail available for questions and answers regarding application issues.
2. Training
 - a. The Vendor must have the capability for on-site training.

3. Updates

- a. The Vendor must have the capability for updating the software. The update process should not require an extended outage of the application. Vendor telephone or direct-access support should be available during any major application update procedure.

3. Vendor Response

Proposal response must be concise and with sufficient detail to allow accurate evaluation and comparative analysis.

Please respond to each of the following items in the indicated sequence and format. Attachments containing supporting material in response to specific items may be submitted. All attachments, brochures and supporting materials should be placed in an Appendix at the back of the proposal and follow the order of the RFP. Completed forms should be returned in a Microsoft Word or Microsoft Excel compatible form.

3.1 Cover Letter

Proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposing entity. Please include the RFP cover page.

3.2 Vendor Information

1. Vendor Contact - Please provide a company representative to contact for questions. Please include the:

Name, Title, Address, Phone, Fax and E-Mail address

2. Vendor to provide 5 reference installations with comparable volumes, configurations, and system requirements.

3.3 Requirements Checklist

1. Provide an executive summary of proposal.
2. Proposed System Configuration
 - A. Provide detailed description of a software proposal; refer to Section 2 Software Proposal.
 - B. Include the following items in responding to the proposed system configuration:
 - Workstation or specialty hardware required
 - Software required

- Server and Network Requirements
- Response time estimates for a data base of 5000 names and 500 activities.
- Installation initial configuration support provided
- Post installation technical support provided
- System Administrator, Operations and User Documentation
- Training support provided
- Description of application software
- Optional support available
- Software maintenance
- Warranties

C. Fill out the adjoining Feature/Function worksheet. The worksheet is to be also submitted in a compatible form with Microsoft "Excel".

3. **Support Services**
Provide itemization of hardware and software support services available and associated cost.
4. **Educational Training**
Identify recommended educational training and cost. Specify number of users to be trained with length of training and type (i.e. video, classroom, remote, etc.).
5. **Implementation Plan**
Include a project management plan to administer the project that includes task description, responsible entities, duration and status reporting procedures.
6. **References**
Vendor shall submit the names, addresses, telephone numbers and length of installation of 5 clients for have installed the proposed applications.
7. Provide cost summary; refer to item 3.4, 'Cost Summary' for details.

3.4 Cost Summary

The Vendor must warrant the cost quoted will remain in effect for a certain period of time and state such in their response.

The Vendor is required also to identify any items that are offered as options and not included as part of the bid. As a separate cost list, please estimate any ongoing operational costs apart from maintenance.

The City reserves the right to buy all or part of the Vendor's offering.

1. Cost Requirements

Please include a detailed cost breakdown of the proposed system broken down in the following categories:

a. Software Configuration
Itemize the application software breakdown. Include software licensing costs if applicable. Please include software maintenance costs for each of the first 5 years and if maintenance is charged during year one.

b. Hardware Configuration
Itemize any Vendor provided hardware costs

If specialty hardware is required for some of the applications it must be bid or specified in such detail that the city may obtain a cost.

c. Services
Itemize costs for project management, hardware maintenance, software maintenance and training.

d. Itemize cost of installation, specialty cabling, etc.

2. Format

Please fill-in the attached Excel spreadsheet along with providing it in electronic form. The attached line-item information will include

- Product Name
- Brief Description (if not self-explanatory)
- Number of users licensed
- List Price
- Discount
- Extended Price

The necessary summary information will include:

- Software modules
- Price
- Training
- Maintenance
- Total Cost

- Total 5 year Cost

3.5 Product Information

The Vendor will attach any supporting materials into the following appendices:

- Appendix A Supporting Detail for RFP Forms
- Appendix B Sample Contracts (not included as part of response forms)
- Appendix C Brochures and other literature

4. Evaluation

4.1 Evaluation Process

The RFP response will be evaluated based upon the detailed information provided. Additional information may be sought from Vendors. Vendors may be asked to present and explain their RFP response at management and technical levels. The RFP responses that appear to be functionally favorable but not necessarily lower cost will be compared to other responses.

1. Evaluation Criteria
 - Cost
 - Ability to meet system requirements as specified
 - Capability of vendor's solution to meet both the current and future application requirements of the City of Monrovia
 - Quality and availability of the support services proposed.
2. Evaluation Team

The evaluation will be performed by a team composed of members of the Community Development, Public Works, Fire and the Information Systems departments.

4.2 Evaluation Schedule

The city is committed to implementing as effective a system as quickly as possible. The following schedule is key to accomplishing this goal.

December, 2013	Proposal sent to Vendors
January 20th ^h , 2014	All proposals received
March, 2014	City Council Review & Award
April, 2014	Start of Implementation
September, 2014	System In operation.

Appendix

A. Indemnification and Insurance Clauses

Indemnification

Vendor shall indemnify, defend and hold the City of Monrovia, its officers, agents and employees free and harmless from and against any and all claims, liabilities, losses, actions, suits, proceedings, damages and expenses (including all out-of-pocket litigation costs and reasonable fees and expenses of counsel) arising out of or in any way relating to vendor's performance of this agreement. The vendor's indemnity shall not extend to occurrences resulting from the sole negligence or intentional misconduct by the City, its officials, agents, employees, or volunteers.

Insurance

Vendor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Contractor, his agents, representatives, employees or subcontractors.

Minimum Scope of Insurance

Coverage shall be at least as broad as:

1. Insurance Services Office Commercial General Liability coverage (occurrence Form CG 0001).
2. Insurance Services Office Form Number CA 0001 covering Automobile Liability, code 1 (any auto).
3. Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

Minimum Limits of Insurance

Vendor shall maintain limits no less than:

1. General liability: **\$5,000,000** per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
(Including operations, products, and completed operations.)
2. Automobile Liability: **\$1,000,000** per accident for bodily injury and property damage.
3. Course of Construction: Completed value of the project with no coinsurance penalty provisions.
4. Workers' Compensation: As required by the State of California.

5. Employer's Liability: **\$1,000,000** per accident for bodily injury or disease.

Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the City. At the option of the City, either; the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the City, its officers, officials, employees and volunteers; or the Vendor shall provide a financial guarantee satisfactory to the entity guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

Other Insurance Provisions

The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. The City, its officers, officials, employees, and volunteers are to be covered as insureds with respect to liability arising out of automobiles owned, leased, hired, or borrowed by or on behalf of the Vendor; and with respect to liability arising out of work or operations performed by or on behalf of the contractor including materials, parts or equipment furnished in connection with such work or operations. General Liability coverage shall be provided in the form of an Additional Insured endorsement (CG 20 10 11 85 or equivalent) to the Vendor's insurance policy, or as a separate owner's policy.
2. For any claims related to this project, the Vendor's insurance coverage shall be primary insurance as respects the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the entity, its officers, officials, employees, or volunteers shall be excess of the Vendor's insurance and shall not contribute with it.
3. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the City.
4. Coverage shall not extend to any indemnity coverage for the active negligence of the additional insured in any case where an agreement to indemnify the additional insured would be invalid under Subdivision (b) of Section 2782 of the Civil Code.

The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the entity for all work performed by the Vendor, its employees, agents and subVendors.

Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII. Exception may be made for the State Compensation Insurance Fund when not specifically rated.

Verification of Coverage

Vendor shall furnish the entity with original certificates and **endorsements** effecting coverage required by this clause. The endorsements should be on forms provided by the City or on other than the entity's forms, provided those endorsements or policies conform to the requirements. All certificates and endorsements are to be received and approved by the entity before work commences. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by these specifications at any time.

Subcontractors

Vendor shall include all subcontractors as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor to the entity for review and approval. All coverages for subcontractors shall be subject to all of the requirements stated herein.

Assignment

Vendor shall not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of the City of Monrovia, which consent shall not be unreasonably withheld. Any attempt to make such an assignment without the City's consent shall be void. For purposes of this paragraph, if Vendor is a corporation an "assignment" shall include an actual change in control of Vendor or a change of ownership of more than fifty percent of the voting stock of vendor, where such stock is acquired by a person or group of persons acting in concert, none of whom already own fifty percent or more of the voting stock, singly or collectively.

Licenses

Vendor represents that it has secured all necessary licenses, consents or approvals to use the software and hardware components of its system and to sell the system under its name. Vendor covenants to defend, indemnify and hold City harmless of any loss, claim or liability in any way related to a claim that City is violating federal, state or local law, or any contractual provisions, relating to trade name, licenses, franchises, patents or other means of protecting interests in products or inventions. Vendor shall bear all costs arising from the use of patented, copyrighted, trade secret or trademarked materials, equipment, devices or processes used on or incorporated in the hardware and system software. In such case materials, equipment, devices or processes are held to constitute an infringement and their use is enjoined, Vendor, at its expense shall: (a) secure for City the right to continue using said materials, equipment, devices or processes by suspension of the injunction or by procuring a license or licenses; or (b) replace such materials, equipment, devices or processes with non-infringing materials, equipment, devices or processes; or (c) modify them so that they become non-infringing or remove the enjoined materials, equipment, devices or processes and refund the sum paid therefor without prejudice to any other rights of City. These covenants shall survive the termination of this Agreement.