



January 18th, 2024

REQUEST FOR PROPOSAL (RFP)

YOU ARE INVITED TO SUBMIT A LETTER OF INTEREST AND A PROPOSAL ON THE FOLLOWING PROJECT:

GIS-Based Asset Management Software

The Woodinville Water District (District) is requesting proposals for the acquisition and implementation of an asset management software solution focusing on operations and maintenance activities, specifically to include water and sewer systems. An ability to provide for Property Management (Facilities) with the same asset management software is desirable. We require easy to use, mobile based software that is highly compatible with our existing on-premises ArcGIS Enterprise SQL database and hardware. Proposals shall include on-premises software, implementation, staff training, and ongoing maintenance support of said system.

It is the District's intention to select one Firm to enter into an agreement to provide the software and services defined in the attached project overview and more specifically in Exhibit A.

1. ABOUT THE WOODINVILLE WATER DISTRICT

The District owns and operates potable supplies and wastewater collection and conveyance located in portions of King and Snohomish Counties in Washington State, servicing a population of approximately 49,000 residents and 20,000 employees. The District retail water service area (RWSA) encompasses approximately 30 square miles, including the entire City of Woodinville and portions of the cities of Bothell, Kirkland, and Redmond, and shares borders with five (5) water purveyors: the Cross Valley Water District, Alderwood Water District, Northshore Utility District, the City of Bothell Water System, and the City of Redmond Water System.

The Operations Department operate and maintain the infrastructure and services that serve our community. District staff do not currently utilize an Asset Management System. The following tables outline a sample of our service profiles related to operations to be supported by the proposed solution:

Water Utility

Distribution Mains: 305.5 miles

Reservoirs: 8

Pump Stations: 5

Water Meters: 14,819

Water Valves: 9,161

Fire Hydrants: 2,739

Sewer Utility

Gravity Mains: 54.4 miles
Force Mains: 0.92 miles
Lift Stations: 3
Siphon Stations: 3
Sewer Manholes: 1,645

2. PROPOSAL SCHEDULE:

Negotiation with the top selected firm will commence upon notice that the selection process is completed.

The selection will be for an agreement to provide the software and perform the services as defined in the attached scope of work and **Exhibit A**, however the District may at their discretion choose to not proceed with additional tasks as defined in the attached project overview, and specifically **Exhibit A**, with the selected consultant.

Event	Dates
RFP Released	January 18th, 2024
Acknowledgement of Receipt Form Due	January 24 th , 2024
Vendor Questions Due	January 26 th , 2024
Responses to Questions by	January 31 st , 2024
Proposals Due	February 21st, 2024
Vendor Proposal Review/Selection/Notification	Feb 22 nd – March 8 th , 2024
Oral Presentations/Interviews	March 25 th – April 2 nd , 2024
Committee Selection Process Complete	April 3 rd , 2024
Negotiations Complete/Agreement signed by Proposer	April 4 th – April 9 th , 2024
*Woodinville Water District Board Approval	April 16 th , 2024

*The Woodinville Water District expects, but does not guarantee, that the decision on selection of a firm will be made by the Woodinville Water District Board of Commissioners on the date indicated above.

3. PROCEDURE FOR SUBMITTING PROJECT PROPOSALS

Time, Place and Format

Proposals must be received at the Woodinville Water District office **no later than 4:00 p.m.** on the date indicated in Section 2. Proposals received in the mail after 4:00 p.m. on the date indicated in Section 2, regardless of the date of their postmarks, will be rejected. Proposals must be sent to the following address and project contact:

*Woodinville Water District
Attn: Dee Lofstrom
RE: GIS-Based Asset Management Software
P.O. Box 1390 or
17238 NE Woodinville-Duvall Road Woodinville, WA 98072*

Proposals must adhere to the following:

- not be folded or tabbed
- show page numbers on all single-sided pages in the proposal
- include **two (2)** printed copies on 8-1/2"x11" white paper
- be submitted in an envelope(s) which clearly states "**Asset Management System (AMS) / Computerized Maintenance Management System (CMMS) Software Project Proposal**"
- identifies the proposer
- Email **one (1)** electronic copy of the complete proposal to the primary project contact.

Pre-submittal Information

Firms that intend to respond to this RFP should promptly complete and deliver the **Acknowledgement of Receipt Form to Dee Lofstrom, no later than 4:00pm on January 24th, 2024.** Email form to dlofstrom@woodinvillewater.com

Vendors who elect to return this form with the indicated intention of submitting a proposal will receive copies of the District's response to questions and RFP addenda, if any are issued. The District may determine it is necessary to revise any part of this solicitation. Revisions will be made by written addenda and it is the Vendor's responsibility to comply with any addenda to this solicitation. Contact Dee Lofstrom, Information Systems Supervisor, via email only at dlofstrom@woodinvillewater.com with specific questions on the RFP or any addenda that may be issued.

4. DATA TO BE SUBMITTED WITH PROJECT PROPOSALS

The content and sequence of the information contained in each copy of the proposal shall be as follows. Data to be submitted with project proposals:

A. Introductory Letter

- The Proposer must submit a cover letter as an executive summary of the Proposer's products and services offered relevant to the scope of work described in this RFP; ability to complete all components of the project; and the firm's contact information (address, telephone, email). An individual authorized to bind the Proposal must sign the cover letter. (maximum two pages)

B. Project Understanding and Approach

- Include your firm's understanding of the work to be performed. In addition, state why your firm believes itself to be the best qualified to perform the services requested. Indicate features, skills and/or services which distinguish your firm and make it the better choice for the Woodinville Water District. (maximum one page)

C. Software Technical Solution

- Provide a general description and overview of the proposed software platform. Include in this section how your software can help the Woodinville Water District with service requests, work orders, asset management, resources management, total asset costing, parts and inventory management, inspections, condition assessments, failure mode and effects and mobile access. Software functionalities should match closely with minimum requirements set forth in **Section 5.** (maximum 2 pages)

D: Exhibit A: GIS-Based Asset Management Software Requirement Matrix Instructions

- Proposers must complete and submit the requirement matrix. The tabs along the bottom are topic(s) specific, with each line item assigned a unique ID. Please reference the tab and line-item ID with each question submitted to the District for response. The District will not respond if the tab and unique ID are not referenced.
- **ID No.:** Unique ID assigned to each specific line item. Reference the tab name and unique ID No. when submitting questions or comments to the District for response.
- **Requirements:** A detailed description of District software/hardware requirements.
- **Base:** Checking this box means that the associated requirement is a standard, out of the box component of the software/hardware.
- **Custom:** Checking this box means that this requirement can be satisfied but will require customization. Please use the Comment field on each tab to describe the customization required and add associated costs for such customization in the Pricing Summary Table in Section 6 of the RFP.
- **Third Party:** Checking this box means that this requirement can be satisfied but will require third party integration. Please use the Comment field on each tab to describe the third-party integration required and add associated costs for such integration in the Pricing Summary Table in Section 6 of the RFP.
- **Future:** Checking this box means that this requirement is currently in the development phase and will be available in future updates. Please use the Comment field on each tab to provide a development and deployment schedule for the enhancement.

E. Services Solution

- Provide a plan for the necessary scope of work for the comprehensive implementation of the proposed Software. Include a scope of work narrative as well as a table listing task items with specific scope items and deliverables. Implementation tasks should include, but may not be limited to:
 - Project management
 - user requirements & business processes
 - migrate existing inspection data from ESRI SQL database
 - configure & test
 - systems integration with ArcGIS Enterprise, Caselle CIS/FIS (on-premise) and ITPipes CCTV software
 - mobile implementation on iPads/iPhones
 - pre-deployment training
 - post deployment support

Include an estimated project schedule with key tasks and milestones. This schedule will be updated and maintained by the Software Implementation Team throughout the entire implementation process. (maximum 5 pages)

F. Vendor Business Information

- The Software vendor shall furnish information about itself, including: (maximum two pages)

- Brief company history
- Contact information
- Primary business location
- Business ownership type
- Business strategy and commitment
- Information on various product lines
- Customer service philosophy and hours of operation
- Number of customers
- Acquisition or merger activity during the past 5 years

G. Project Team

- The proposer shall provide an organizational chart indicating roles and reporting relationships for key personnel on the team. Clearly indicate the Project Manager who will have day-to-day responsibilities for the duration of the contract. Describe how the team will interact and communicate with Woodinville Water District staff. (maximum one page)

Provide resumes, with home office location, for all key personnel on the team as described above. Each resume should be limited to no more than three (3) pages per person and should, at the least, include the following:

- Name and title
- Professional background
- Current and past relevant experience
- Relevant training
- Two (2) references for each key personnel member on similar projects.

All proposed key personnel shall have at least three (3) years' work experience with CMMS implementation projects similar to the proposed work.

H. Software Demonstration Video

- Include a screen captured demonstration video (.mp4 format) of the proposed software performing the below scenarios in a sample/generic test environment. Video should be provided on a USB flash drive, should not exceed 30 minutes in length total for all six, and can include narration if desired. Scripted demos are included in this Request for Proposal as **Exhibit B**, and they are as follows:

1. Service Request For Water Quality Call
2. Customer Backs Out Of Driveway And Hits Fire Hydrant
3. New Meter Applications W/Backflow Device Requirements
4. Purchase Orders And Inventory Tracking
5. Operations Department Quarterly Report Creation
6. Total Asset Costing For An Asset In Service

Please Note: The software demonstration video is highly encouraged, but not a required part of the initial proposal submittal. Please check the applicable box on the attached Exhibit B-Demo Scenarios, under each scripted demo so the District is aware that a flash drive should be included in the package, and which scenarios, if any, are demonstrated on that flash drive.

I. References

- Describe the firm’s experience managing projects of this scope and the firm’s ability to deliver. Include at least three projects completed in the Northwest, preferably in the Seattle area, for Water and/or Sewer Utility Districts or Cities of a similar size and are like the project described in this request. For each project, provide the following information: (maximum one page)
 - Name, address, and telephone number of the client.
 - Name of the firm’s project manager and personnel who worked on each project with a brief description of their responsibilities.
 - The elements of the projects that are common to the projects proposed above.
 - Summary of the firm’s role/responsibility in overall project.
 - Summary of the firm’s deliverables.

5. SOFTWARE MINIMUM REQUIREMENTS AND SCOPE OF WORK

The District is issuing this RFP for a CMMS/asset management software system (“Software”) and its related implementation services, including project management, documentation of business processes and user requirements, data migration, configuration, systems integration, mobile implementation and training and support services. It is the District’s preference to enter into an agreement with a single software solution provider that functions as a primary contact in providing the complete range of required functionality and related services described below. The District may also choose to contract individually with a third-party consultant for internal Software project management assistance.

Successful proposers must be able to meet the minimum software and service requirements described in this section and should also be able to provide a product that meets most of the software requirements outlined specifically in **Exhibit A**.

The primary goal of this project is to develop and implement software that manages infrastructure and asset-related data relating to field inspections, asset management, work order management, inventory management, lifecycle management, asset criticality, asset condition projections and budget scenarios, and replacement planning and reporting. Essential features and functions of this software will provide:

Software Solution Minimum Requirements Overview

- A commercially available, robust, off-the-shelf software that requires minimal customization to implement and maintain.
- Dashboard that displays multiple Key Performance Indicators (KPI)s and supports different configurations for different user groups.
- Includes real-time integration with ESRI’s Enterprise Geographic Information System (GIS) software for asset tracking, service request generation and work order creation and management.
- A highly intuitive system from a user perspective that can position the Woodinville Water District to take advantage of the latest technology to improve departmental performance and efficiency.
- Accessibility of data that includes robust reporting capabilities (canned, roll-up, ad-hoc and push reports) and GIS queries without the need for a programming specialist.
- User-friendly mobile applications (iOS and Android).
- Capable of tracking specific assets and associated data including attributes, work order history,

- condition assessment history, inspection history, cost of asset maintenance, and asset lifecycles.
- Long term asset management functionalities to include funding forecast, risk analysis and CIP planning.
 - Capable of issuing service requests and work orders to track costs for all related work activities.
 - Intuitive features to help quickly find records, such as QR/bar code scanning, sorting, filtering, and searching.
 - Ability to integrate with existing programs, including but not limited to an Enterprise GIS, financial information system, customer information system, document management system, utility locate system, and a Closed-Circuit Television (CCTV) system.
 - Be able to link/store external files that may include a variety of document types, images, or URLs.

Key Functional Objectives

Customers and Service Request Management

- Track customer service requests.
- Provide multiple ways to submit service requests.
- Graphical interface for map-based service request management, including pins color coded by priority.

Maintenance Management

- Create and complete work orders on linear, vertical, and non-GIS assets.
- Track work order costs such as labor, equipment, materials, and miscellaneous costs.
- Assign multiple assets or tasks to a single work order.
- Create preventive maintenance templates that automatically generate work orders by schedule or run time.
- Create, assign, and complete work activities on desktop or mobile.
- Associate checklists to specific task types.
- Roll-up of work activities for project level costing and tracking.

Resource Management

- Ability to track labor, equipment, and material costs by asset or work order.
- Allow for multiple labor rates.
- Training trackers for employees' training and certifications.
- Warehouse inventory management that supports multiple warehouse/storage locations, purchase requisitions, inventory reorder, purchase orders, cycle count and receiving.
- Warehouse "store" capability for employees to easily browse through order common items.

Asset Management

- Create asset inventories and track asset attributes.
- Establish asset inventory in a hierarchy format that can include locations, sub locations, similar functions, parent assets and child assets.
- Asset inventory must accommodate GIS and non-GIS assets with equal effectiveness.
- Users must be able to switch between asset list and map views.

- CCTV integration for condition assessment.
- Unique lifecycle plans and attributes for different asset classes.
- Asset failure codes that track asset failure modes and failure effects
- Track historical work orders, preventive maintenance, condition assessments and inspections to assets.
- Asset records contain useful life, condition, and risk index KPIs.
- Create inspection forms that may include backflow testing, valve exercise, sanitary sewer overflows, operational and lab reports results which impact asset condition.
- Add and view attachments to asset records.
- Set up preventive maintenance schedules on assets and trigger work orders based on schedule or run time.
- Provide asset management funding forecast (5, 10, 15, 20, 25 years).
- Ability to prioritize assets based on risk and criticality.
- Built in capital improvement planning and risk-based scenario planning.

Field Access/Mobile

- iOS and Android based mobile application that includes Asset Inventory, GIS, Work Order, Service Request, Warehouse Inventory, Condition Assessment, and Inspection.
- Application must be specifically designed for mobile operating systems and take advantage of inbuilt hardware such as camera for bar/QR code scanning and location services.
- Capture pictures using mobile device to upload into asset inventory, work order, service request, warehouse inventory, condition assessment or inspection.
- Ability to view various document types attached to records.
- Mobile application must be able to create and complete work orders, enter resources, create new assets, edit existing assets and attributes, create and complete service requests, create and complete condition assessments, enter asset failure codes that track asset failure modes and failure effects, create and complete inspections, view and manage warehouse inventory, and view and manage all historical work orders, inspections, and condition assessments for assets.
- Mobile application must tie into the District's existing GIS database.

System Requirements

- Operates on a highly secured, web-based system or through a SQL Server.
- Locally hosted.
- Flexibility and opportunity for growth through modular design.
- Standard and custom notifications must be able to notify users via email, SMS or popup notifications.
- Encrypted and password protected.

Please see Exhibit A for complete list of software requirements

Minimum Implementation Service Requirements:

- Successful experience implementing the proposed Software for municipal clients.
- Comprehensive in-house implementation services including project management, user requirements and business process mapping, data migration, configuration, mobile, integration and training.
- Be able to provide sufficient training to administrators and users to successfully utilize all functions of the Software.
- Provide ongoing technical support during the term of the agreement.
- Installation of software on client server.
- Web Application Program Interface (API) for integration with other information systems.
- Ability to import data from MS Excel and MS Access.
- Full customer service for software upgrades.

Software Users:

Category	Number of Users
General Manager	1
G & A Manager	1
G & A Support	3
Engineering Manager	1
Engineering Support	3
Inspectors	1
IT Manager	1
IT Support	2
GIS Support	2
Finance Manager	1
Finance Support	6
Operations Manager	1
Management/Supervisors	4
Utility Leads	2
Utility Workers	<u>8</u>
Total Users	37

6. Pricing Summary

Use the template provided to summarize pricing information for your proposed solution for an On-Premises system. Additional documents may also be provided as supporting information to the summarized information on this page. Pricing must be fully comprehensive, complete, and list any available discounts. All one-time and recurring costs must be fully provided.

Woodinville Water District		
Asset Management Pricing Proposal – On-Premises		
Items	\$	Assumptions/Comments
Software Cost		
Hardware Cost		
Implementation		
Data Conversion-ITPipes, ESRI		
Training		
Travel		
Report Development		
Licensing for 20 users (mobile and desktop)		
Recurring Maintenance-Year 1		
Recurring Maintenance-Year 2-5		
Third Party Add-Ons		
Customization Requirements		
Sub-Total		
Estimated Taxes		
Grand Total:		

7. General Information

- A. **Withdrawal of Proposal:** Proposals may be withdrawn at any time prior to the submission time specified in this RFP, provided notification is received in writing. Proposals cannot be changed or withdrawn after the time designated for receipt.
- B. **Proposal Validity Period:** Submission of the proposal will signify the vendor’s agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between the District and the awarded vendor.
- C. **RFP Revisions:** It is the intention of the District to issue a contract to the company whose proposal is deemed to be the best fit and in the best interest of the District. The District reserves the right to

choose to re-issue the RFP. The District reserves the right to postpone the opening of proposals and to reject any and all without indicating any reasons for such rejection. During the evaluation process, the District reserves the right, where it may serve the District's best interest, to request additional information or clarifications from proposers, or to allow corrections of errors or omissions.

- D. **Statement of Confidentiality:** "Under Washington State Law," the documents (including but not limited to written, printed, graphic, electronic, photographic, or voicemail materials and/or transcriptions, recordings, or reproductions thereof) submitted in response to this Request for Proposal (the "documents") becomes public record upon submission to the District, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law.
- E. **Commitments:** All quotes should be submitted initially on the most complete basis and with the most favorable financial terms available. The selected vendor's proposal may, at the District's option, be made part of the final purchase contract and all representations in the vendor's proposal may be considered commitments to supply the system as described. Vendors may submit more than one proposal in response to the RFP. However, each proposal must be a separate, complete, stand-alone package which can be considered independently of any other proposals from the same vendor.

8. Evaluation Criteria for Written Proposal

Each proposal will be evaluated and given a score based upon the quality of response to each of the following requirements/criteria listed below. A maximum number of points achievable is 50. The District will use the following rating system:

Rating System:

- **Poor (0-2):** The vendor's proposal is incomplete or would not meet the District's needs. Serious questions/doubts surround vendor responses.
- **Satisfactory (3-7):** Meets the District's basic needs but lacks advanced or value-added qualifications and experience, product features, elements of a strong implementation plan, and/or support services.
- **Outstanding (8-10):** Meets the District's basic needs and offers advanced or value-added qualifications and experience, product features, elements of a superior implementation plan, and/or support services.

1. Functionality, methodology, operation, and implementation plan

- a. Implementation schedule and plan
- b. Complete integration with ArcGIS Enterprise
- c. Complete or partial Integration ability with software other than ArcGIS, such as on-premises Caselle (FIS/CIS/time sheets), ITPipes CCTV software, document management software (future).
- d. Module availability in addition to asset management
- e. System navigation, user interface, accessibility, ease of use, look and feel
 - i. Similarity of function and interface between desktop and mobile device

operations

- f. Administrative configuration features and tools
- g. Customization environment, workflow automation, report writers

2. Experience, References, and Qualifications

- a. Experience and demonstrated success in performing work like that described in this RFP.
- b. Previous experience with local cities and/or public agencies.
- c. Knowledge of asset management best practices for public organizations
- d. Experience in developing integrated workflows with GIS for asset management.
- e. Experience with field work, asset inspection and assessment management.

3. Ability to demonstrate relevant use of software

- a. Selected vendors will be required to perform live demos previously may have been submitted as a screen captured demonstration video (.mp4 format) or as described in **Section H, and attached as Exhibit B**. The District highly encourages live vendor demonstrations at the District office on a date and time arranged by District staff. However, if circumstances prevent a live demonstration, a Teams meeting can be arranged by District staff at their discretion at a time most convenient to all involved.

4. Customer Service Plan

- a. Annual expense year one and years 2-5
- b. Availability and response time to critical and routine issues
- c. Availability for training; On-site and/or Remote
- d. Learning Library; Conferences, Webinars, Blogs, User Groups
- e. Upgrades/Patch Notification

5. Cost

- a. The proposal must contain a fee schedule that includes line items for equipment (if applicable), software, professional services, warranties, project management, installation, and training.
- b. Additional module cost/availability (e.g., project management, fleet, permitting, etc.)
- c. Flexibility, options for individual module purchase
- d. Per user/device cost
- e. Licensing (initial and ongoing)
- f. Ongoing annual cost including maintenance and/or technical support
- g. Upgrades/updates

The evaluators will consider how well the vendor's proposed solution meets the needs of the District as described in the vendor's response to each requirement in this RFP. It is important the responses be clear, concise, and complete so that the evaluators can adequately understand all aspects of the proposal.

This RFP provides general and technical information as well as the required format for responses. Please include all required and appropriate information with your proposal. No other source of information submitted, written, or verbal will be considered part of your proposal.

Project Agreement Provisions

- The selected Consultant will be required to sign a Professional Services Agreement. A copy of this agreement is included in the RFP.

The Woodinville Water District, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR 26 will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award.