



## **CITY OF MIDDLETOWN, OHIO**

### **REQUEST FOR QUALIFICATIONS**

**Legal Notice No. 21-8244**

**June 14, 2021**

## **Municipal Operations Management Software**

### **PROPOSALS ARE DUE:**

**July 16, 2021**

**No later than 11:00 am**

### **Direct all inquiries regarding this RFQ to:**

Nakita Lancaster, PE

Assistant Director – Public Works and Utilities

Email: [nakital@cityofmiddletown.org](mailto:nakital@cityofmiddletown.org)

Phone: 513-425-1856

Contents

1. Purpose ..... 3

2. Background ..... 3

3. Qualifications ..... 4

4. Scope of Services..... 4

5. Statement of Qualifications Requirements ..... 6

6. Submission of Qualifications ..... 7

Appendix A: Technical Requirements ..... 8

## 1. Purpose

The City of Middletown is soliciting Proposals from qualified vendors for the procurement of a hosted software solution that supports multiple departments in permitting, enforcement, inspections, workflow, asset management, and development. It is the intent of the City to purchase software that will maximize operational efficiency, increase visibility of municipal functions to the public, streamline communications between departments, simplify cataloging of data and inventorying of assets, support optimization of asset useful life, and provide critical data and evaluation tools for budgetary considerations.

The software should provide a cohesive, multi-functional, flexible, robust, and integrated system that will increase efficiency, support informed decisions, and support the City's municipal operations management needs. User-friendliness is essential for maximizing staff efficiency and usage by numerous and various types of users. Technical support options should include email, phone, live chat, and remote assistance. An on-line knowledge base is highly desirable. The system should be cloud-based with an option for on-site hosting.

## 2. Background

The immediate need of the City is to procure software for by multiple departments to streamline asset management, permitting and communication to the public. Asset management capabilities should be expandable to include other departments such as police and fire.

Additionally, the City desires a software that has the capabilities to expand to serve our Community Development, Economic Development Department and Human Resources. These are not specific requirements of this RFQ but proposers should note if their software could include these capabilities or synch with other such programs.

The software proposed should be interactive between multiple departments but will start with the Department of Public Works.

The City of Middletown Public Works Department is responsible for the operation, maintenance, preservation and improvement of:

- Drinking Water System, Wastewater, and Stormwater
- 621 lane miles of roadways and various other roadway appurtenances such as traffic signals, signs, speed/radar instruments, street lighting, pavement markings, and guardrail
- 27 parks, 2 nature preserves, and three plazas for a total 270 developed acres, 48 undeveloped acres, and 4 miles of paved trails

The Public Works Department is also responsible for vehicle and equipment fleet maintenance and building and grounds maintenance.

### CURRENT DATA MANAGEMENT

The City of Middletown manages its assets and data on paper and electronically using forms, spreadsheets, and GIS mapping.

### **3. Qualifications**

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 in response to this RFQ must meet the following requirements:

- Possess a solid Customer base utilizing the Vendor's software.
- Demonstrate successful experience implementing the proposed software.
- Meet all functional and technical requirements stated within this RFQ using commercial off-the-shelf software.
- A highly intuitive system from a user perspective that can position the City to take advantage of technology to improve departmental performance and efficiency.
- Easy access to the data for report and query generation without the need for a programming specialist.
- Provide options for user-friendly mobile technology for field crews, integrating mobile devices for both Apple and Android based products.
- Provide spatial capabilities through industry-standard GIS to augment Operations Management activities, including integration with existing geodatabase and referencing systems.
- Asset tracking for specific assets, including the ability to track attributes, work and maintenance history, cost of maintaining the asset, and asset lifecycle management.
- The successful vendor shall 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 existing resources.

### **4. Scope of Services**

The following is an overview of the essential software capabilities/requirements. A full list of technical requirements is included in Attachment A.

#### Request Management

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

#### Work Management

- Create and complete work on both assets and non-assets
- Easily create, assign, prioritize, and complete work activities
- Roll-up of work activities for project level costing and tracking

- Project activities with their cost, to maximize the life of assets
- Auto notification via email related to assigned and completed work

### Asset Management

- Ability to create asset inventories and track asset attributes
- Assets performance to 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 labor, equipment, and materials costs
- Allow for multiple labor rates
- Ability to expense equipment in either time or miles
- Materials inventory management
- Manage materials based on location
- Bulk order, order tracking, and material location transfer
- Auto notifications via email for material reorder alerts

### Community Development

- Allow for online permitting applications and tracking
- Allow for development projects applications and tracking

### Mobile/Field Access

- Native iPad/tablet 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 iPad/tablet 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.
- Ability to present various report or query information in GIS.
- Ability to create “maps” based on pre-defined, or filtered criteria.
- Real-time data updates, preferably Cloud storage.

#### Data Integration

- Integration of data between various existing databases so that data can be viewed by staff in other divisions without having to log into another system.
- Capture and conversion of historical data.
- Interface with existing systems prior to new system implementation.

## **5. Statement of Qualifications Requirements**

#### Company Background

Vendors shall provide the following company background information:

- Size
- Location
- Number of years in business
- Number of employees
- Installation references with contact information
- Support hours of operation and methods used (phone, chat, web etc.)

#### Executive Summary

Vendors shall provide an executive summary written in non-technical language to summarize the overall capacity and recommended approaches for a software solution, based on the needs described in this RFQ.

#### System Functionality

Vendors should describe anticipated implementation strategies for software solutions meeting the City’s needs, including a recommended rollout strategy and potential project plan indicating timeframes for phases, as well as the entire project.

#### Recommended Approach

Vendors should provide detailed information on their proposed software and approach. The information should include recommendations taking into consideration the City’s existing processes, data management methods, and system requirements. Describe how your software would satisfy the City’s needs based on provided background information, requirements, current processes and recommended implementation strategies.

#### Attachment A

Complete the form included in Attachment A and submit with proposal.

## **6. Submission of Qualifications**

Submit an electronic copy in PDF format. The electronic copy shall be received no later than Wednesday, July 16, 2021. Late responses will not be accepted.

Proposals shall be emailed (as an attachment or link to download) to:

Nakita Lancaster: [nakital@cityofmiddletown.org](mailto:nakital@cityofmiddletown.org)

After reviewing the SOQs, the City will short list potential vendors and conduct demonstrations to view software platform and functionality. Following the demonstrations, the City may select multiple vendors to submit cost proposals to the City.

The City will select the Proposal that, in its opinion, is in the best interest of the City. The City will base its choice on considerations including, but not limited to, overall clarity and quality of the submission, vendor viability, strength, and experience, vendor ability to meet functional and technical requirements (including the work associated with implementation, technical services and support), and initial, on-going, and known and potential additional costs.

The City reserves the right of evaluation and the right to determine the methodology for evaluation of the Proposals to determine the best Proposal. The most qualified Proposal will not necessarily be the Proposal with the lowest cost.

The City reserves the right, at its sole discretion, to reject the Proposal of any or all Proponents if the City believes that it would not be in the best interest of the City to make an award for any reason, which may include because the Proposal is nonresponsive, non-conforming, conditional, or because the Proponent fails to meet any other pertinent standard or criterion established by the City. The City reserves the right to waive any or all informalities and/or minor technicalities.

The City of Middletown assumes no financial responsibility in connection with vendor costs incurred in the preparation and submission of the RFP packets, nor shall it constitute a commitment, in any way. The City of Middletown reserves the right to cancel this RFP if it is deemed in the best interest of the City to do so.

## **Appendix A: Technical Requirements**



## Attachment A: TECHNICAL Requirements

Provide a response in the “RESPONSE” column for each Requirement as follows:

**Yes** – Bidder meets the requirement without customization

**Custom** – Bidder can meet the requirement with some customization

**No** – Bidder cannot meet the requirement

**Future** – Requirement is a future feature currently in development. Please state estimated date when the feature would be available under Comments

### Section 1: Technical Requirements

	REQUIREMENT	RESPONSE	COMMENTS
<b>A</b>	<b>GENERAL REQUIREMENTS</b>		
1	System must be cloud-hosted Software-as-a-Service.		
2	System is accessible from any computer with a modern Internet browser.		
3	System is accessible from Android-based mobile devices.		
4	System is accessible from iOS-based mobile devices.		
5	System supports single-sign-on, which includes Active Directory.		
6	System must be updated and enhanced regularly. At minimum, software should be updated monthly. Please describe cadence of updates and enhancements.		
<b>B</b>	<b>SECURITY REQUIREMENTS</b>		
1	Data Center must be hosted in the U.S.		
2	System must be secured and backed up on a regular basis. Describe the cadence of these backups.		
3	System must have a minimum of 99% system availability and uptime. Provide your SLA.		
4	Bidder must have both a primary and a disaster recovery data center. List locations of both.		
5	Data centers must have 24x7x365 staffing and monitoring.		
6	Data centers should have, at minimum: <ul style="list-style-type: none"> <li>• Multiple power failure protections</li> <li>• Redundant, load-balanced network</li> <li>• Automatic failover</li> <li>• Fully meshed network with independent fiber connection feeds</li> <li>• Advanced fire protection</li> </ul>		
7	Data encryption at rest.		

8	Data encryption in transit.		
9	Client data must be segmented. Describe how the Bidder will ensure this.		
10	Bidder must have a continuity plan in place in case of a failure or attack.		
11	Bidder must have security features in place to protect against intrusion, data leaks and attacks. At minimum, Bidder must have firewalls, intrusion detection and vulnerability assessments.		
12	Bidder must have processes in place to prevent a DDoS.		
13	Data centers should undergo annual third-party audits, including, but not limited to: <ul style="list-style-type: none"> <li>• SSAE 18</li> <li>• SOC 2</li> <li>• PCI-DSS1</li> <li>• GLBA</li> <li>• HIPAA</li> </ul> List all third-party audits Bidder participates in.		
14	Describe your RPO and RTO.		

## Section 2: Core Functional Requirements

#	REQUIREMENT	RESPONSE	COMMENTS
<b>A</b>	<b><u>SYSTEM ADMINISTRATION</u></b>		
1	System must allow users to reset password		
2	System natively supports multiple languages		
3	System can display times from multiple time zones		
4	System supports single-sign-on based on Active Directory		
5	System must provide capability to import and export users		
6	System shall provide the ability to import directly into the system data points such as but not limited to Sites, Locations, Assets, Meter Readings and Users.		
7	Must Support Various user roles, including but not limited to: <ul style="list-style-type: none"> <li>• Account Admin</li> <li>• Contractor</li> <li>• Inventory Manager</li> <li>• Maintenance Technician</li> </ul>		

	<ul style="list-style-type: none"> <li>• Observer</li> <li>• Requester</li> <li>• Supervisor Lead</li> </ul> Provide a list of all user roles in the comments.		
<b>B</b>	<b>DISPLAY &amp; CUSTOMIZATION</b>		
1	System must include dashboards that can be configured to individual user needs or specific roles with saved reports, status updates, chosen KPI's, and links to navigate the system.		
2	Ability to configure customer definable rules-based workflows within the System		
3	System must contain quick link shortcuts to application features		
4	System must provide configurable data views, including: <ul style="list-style-type: none"> <li>• Add/Remove/Move Columns</li> <li>• Sort on columns</li> <li>• Search and filter</li> </ul>		
5	Integration: Must have an API available or method to enable integration with existing or third-party software systems.		
6	Ability to add Regions as part of location		
7	Ability to add Sites as part of location		
8	Set Approval Rules for Work Orders, PMs, etc.		
9	Work Order Routing – Describe ability to route work orders based on specified rules		
10	The System shall have the ability to: <ul style="list-style-type: none"> <li>• Set Part reorder point calculation</li> <li>• Prohibit quantities of a part to drop below zero</li> </ul>		
11	Prevent Technicians from editing existing labor transactions		
12	The system shall allow for Work Order Filed Hierarchy		
13	The system shall allow for configuration of work request templates		
14	The system shall allow for configuration of Work Order Templates		
15	Customizable WO Statuses		
16	The system shall allow for configuration of Email Templates		

<b>C</b>	<b><u>ASSET MANAGEMENT</u></b>		
1	Ability to support GIS and non-GIS based assets including fleet and facilities that are not attached to a map		
2	Ability to assign assets to a work order		
3	Auto prioritization of assets		
4	Ability to associate unlimited levels of hierarchy to assets		
5	Ability to associate multiple assets		
6	Ability to associate documents with assets		
7	Ability to attach notes, photos and documents to an asset		
8	Ability to quick create work order from asset		
9	Bulk cross-site asset duplication		
10	System supports asset tagging and scanning with mobile app		
11	Ability to print asset information		
12	Allows for asset barcoding		
13	Supports label printing		
14	Allows for trend analysis		
15	Allows for the csv or Excel export of asset data		
16	Ability to place assets on a floorplan/drawing		
17	Ability to assign criticality values to an asset		
18	Ability to track total cost of ownership and depreciation		
19	Ability to track Warranty information of all assets		
20	Ability to filter through asset history		
21	Ability to generate BOM as parts are added onto a work order		
22	Ability to "Save to" My Reports		
<b>D</b>	<b><u>WORK ORDER MANAGEMENT</u></b>		
1	System allows requesters to search existing work orders for problem type, trade, etc. when submitting work orders		
2	Ability to archive WOs with all relevant data, e.g. internal notes, attachments (for user defined period)		
3	Ability to receive service requests from desktop or mobile devices		
4	Provide the ability to approve or deny a service request		

5	Contain work request forms to capture critical information		
6	Ability to capture requestor information on form		
7	Ability to associate multiple work orders		
8	Ability to connect to Departments, Locations, Assets, and other source types		
9	Ability to assign work to multiple technicians		
10	Ability to include notes / comments on work order		
11	Ability to attach photos, manuals and other documents		
12	Ability to assign priority to a work order		
13	Ability to assign a Cost Center to a work order		
14	Ability to export work orders with batch updates		
15	Ability to automatically route work orders to an individual or department based on request type		
16	Ability to add/ assign parts to a work order		
17	Ability to issue purchase orders		
18	Ability to batch re-assign work and ticket statuses		
19	Ability to cost summarize filtered on screen work order results		
20	Ability to track labor hours for each assignee		
21	Ability to capture all associated costs (parts, labor, equipment usage)		
22	Duplicate work orders		
<b>E</b>	<b><u>PREVENTIVE MAINTENANCE SCHEDULING</u></b>		
1	Ability to create, manage and control preventative maintenance schedules		
2	Must provide Task Libraries for PM tasks		
3	Ability to schedule preventative work on a recurring basis (monthly, quarterly, etc.)		
4	System must allow for importing and exporting of PM work orders		
5	Ability to generate preventative work based on meter readings		
6	Ability to have some type of work load planner with Drag and Drop functionality		
7	Ability to tie a Preventative to a particular asset or piece of equipment		
8	Ability to set minimum and maximum thresholds on meters to trigger preventative maintenance		

9	Provide Preventative Maintenance templates for scheduling		
10	Contains built-in PM Task library to aid in defining PM tasks and procedures		
11	Ability to view scheduled work orders in a calendar view		
12	Ability to assign parts and personnel to scheduled work		
13	Ability to attach documents to a scheduled work order		
14	Ability to generate labor and materials cost reports		
15	Ability to use captured data from work orders to report on cost data for individual or multiple departments		
16	Ability for department supervisors to validate work hours		
17	Ability to prevent new work orders from being scheduled until existing orders are completed		
18	Ability to duplicate, delete or disable scheduled preventative maintenance		
19	Provide Preventative Maintenance reports		
20	Ability to create stacking groups on common PMs for more efficient maintenance workflows		
<b>F</b>	<b><u>PARTS MANAGEMENT</u></b>		
1	System must have the ability to pull inventoried parts and assign them to work orders		
2	Transactions including parts must influence recorded stock levels		
3	System must track storage location of inventoried parts		
4	System must track parts manufacturers and suppliers		
5	System must allow for importing and exporting of Suppliers		
6	System should allow for importing and exporting of parts		
7	System must allow for batch update of parts & import/export of parts		
8	System must allow users to print QR codes, barcodes, labels, etc.		

9	System shall be able to report on current stock values, itemized inventory, transactions, usage, and back order.		
10	System allows alerts based on Reorder point		
11	Associate parts to assets and PM's		
<b>G</b>	<b><u>MOBILE SUPPORT</u></b>		
1	Provide a mobile computing option to support efficiency, accuracy and real-time information between the field and the office		
2	Ability to access work order management through mobile devices (e.g. Apple & Android phones/tablets)		
3	Ability to create, update and close work orders in mobile view		
4	Ability to execute workflow approvals through mobile view		
5	Accessibility of proposed solution in field using various mobile devices and platforms		
6	Barcode/QR scanning to prompt user to take action on an asset or inventory item to create a work order, view history or enter usage readings.		
7	Ability to execute tasks in offline mode, i.e. and disconnected editing from a mobile device		
8	Map-based service request and work order generation		
9	Ability to attach images/photos to asset/work order		
10	Link to GIS Assets		
11	Easy one-touch work order creation		
12	Capture employee device location		
13	Ability to capture labor time, including hours spent per work order.		
14	Must include built-in timer to accurately record work order labor hours.		
<b>H</b>	<b><u>GIS</u></b>		
1	Display all GIS layers and toggle layer visibility		
2	Synchronization with GIS-based asset registry		
3	Map-based service request and work order generation		
4	Access GIS mapping via mobile device		

5	Access GIS data points by hyperlinks, provided that the data is correctly formatted		
6	View PMs on a GIS map		
7	Addressing and ESRI geocode service support		
8	Automatic and user selectable work order address assignment		
9	Include measurement tools		
<b>I</b>	<b><u>AUDITS &amp; INSPECTIONS</u></b>		
1	Ability to attach or link a photo directly to an observation		
2	Ability to allow for multiple inspections per asset and store inspection results including date and inspector information for each inspection.		
3	Ability to store a link to, and view, a checklist or specific instructions for any type of inspections conducted at a location where the parcel would be the asset		
4	Ability to attach any type of documents such as, but not limited to checklists, specific instructions, safety procedures, specialized maintenance information or repair procedures to a PM template.		
5	Ability to view any type of documents such as, but not limited to checklists, specific instructions, safety procedures, specialized maintenance information or repair procedures via a PM template.		
<b>J</b>	<b><u>REPORTING</u></b>		
1	Business Intelligence Reporting including <ul style="list-style-type: none"> <li>• Employee Utilization</li> <li>• YOY Trends</li> <li>• Comparative Analysis Filters</li> </ul>		
2	Benchmarking with KPIs from peer groups of similar size and scope		
3	System shall include user configurable dashboards by security role (e.g. admin, department lead, crafts person) that includes Work Orders, Service Level Agreements and Preventative Maintenance.		
4	System can provide report format flexibility (e.g. capable to produce reports in .pdf, Excel, and other standard formats)		



5	System shall allow users to save, export, print and share reports		
6	The system shall provide the following reports on asset costs, life-cycle, detailed and general information		
7	System shall allow for additional reporting, including: <ul style="list-style-type: none"> <li>• Purchase Order Summary</li> <li>• Safety Program Summary</li> <li>• Incident reports</li> <li>• Projects</li> </ul>		
8	Open vs. Completed Work Orders		
9	Actual vs. Estimated Costs and Hours		
10	Completed On Time/Late Summary		
11	Completed Work Orders by Department		
12	Asset Downtime		
13	Labor by Type		
14	All Labor Costs		
15	Location Comparison		
16	Mean Time to Repair		
17	All Part Usage Reports		
18	Work Order Summary		
19	Ability to "Save to" My Reports		
20	Must be able to Create a Custom View		

### Section 3: Advanced Option Features

#	REQUIREMENT	RESPONSE	COMMENTS
<b><u>K</u></b>	<b><u>ASSET MANAGEMENT</u></b>		
1	Must allow for Administrator-definable user roles		
2	Bidder must provide onsite consulting/training as an option		
<b><u>L</u></b>	<b><u>DISPLAY &amp; CUSTOMIZATION</u></b>		
1	Must allow for complete customization of fields and drop downs.		
2	The system shall allow for Custom Fields to create new types of data that can be stored in various categories.		
3	Contains custom fields for asset properties		
<b><u>M</u></b>	<b><u>WORK ORDER MANAGEMENT</u></b>		
1	System must allow for importing of work orders		

2	Provide work request forms with custom fields		
3	Ability to create custom fields		
4	System must allow for exporting of work orders		