



## **Request for Proposals**

**For**

## **Computerized Maintenance Management System (CMMS)**

210 North 27<sup>th</sup> Street P.O. Box 1178, Billings, MT 59101



**Request For Proposals  
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## Section 1: General Information

**Request For Proposals (RFP) – Computerized Maintenance Management System (CMMS)**

THE ABOVE DESCRIPTION MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE. **THIS IS NOT AN ORDER.**

PROPOSALS MUST BE <u>RECEIVED</u> NO LATER THAN: <b>Wednesday, March 17th, 2021, at 5:00 pm (MST)</b>	RFP INITIATIVE: <b>Computerized Maintenance Management System (CMMS)</b>
<ul style="list-style-type: none"><li>• All suppliers must respond in detail to each element of this RFP in order to be considered for contract award.</li><li>• All proposals must be mailed or emailed to contact person at the address below.</li><li>• No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.</li><li>• If pricing has been requested, it must be in a separate sealed envelope or emailed under separate cover and “CMMS RFP Confidential Pricing” as the subject line.</li><li>• If proposal is mailed, pricing may be included in a sealed envelope; however,</li><li>• If proposal is emailed, pricing must be mailed in a sealed envelope or emailed under separate cover and “CMMS RFP Confidential Pricing” as the subject line.</li><li>• If proposal is mailed, please also include or email an electronic version, minus pricing</li></ul>	
SEND ALL CORRESPONDENCE TO THE CONTACT BELOW:	
<b>City of Billings 4848 Midland Rd Billings, MT 59101</b>	<b>Or</b>
<b>John Caterino, Facilities Supervisor Email: <a href="mailto:caterinoj@billingsmt.gov">caterinoj@billingsmt.gov</a> PHONE: (406) 855-8454</b>	



## **Section 2: Objectives**

### Introduction and Objectives

This RFP is issued by City of Billings for the purpose of obtaining information and pricing regarding a Computerized Maintenance Management System (CMMS). It is the intent of the City to review and assess the RFP responses to determine which proposal best meets the needs of the City.

Suppliers are expected to provide their best and most competitive proposal.

**Attachment E, the Intent to Respond form, must be completed and emailed or faxed at least two (2) days prior to the advertised RFP due date.**

## **Section 3: Information for Suppliers**

### Disclaimer

This RFP does not form or constitute a contractual document. The City of Billings shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. The City also will not be responsible for any expenses which may be incurred in the preparation of this RFP. This RFP is not to be construed as a contract or commitment of any kind.

### Instructions to Proposers

#### EXAMINATION OF DOCUMENTS

Before submitting the proposals, the proposer shall:

- (a) Carefully examine the Standards and Specifications as well as all other attached documents;
- (b) Fully inform yourself of the existing conditions and limitations;
- (c) Include with the proposal sufficient information to cover all items required in the specifications.

#### PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected.



### WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal by written request at any time prior to the due date set for receiving proposals.

### QUOTE VALID

The proposer must honor their quote for a period of ninety (90) days after the RFP due date.

### CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

### INSURANCE REQUIREMENTS

**The proposer certifies that it/they can comply with the City of Billings insurance requirements of :**

1. **Workers' compensation and employer's liability coverage as required by Montana law.**
2. **Commercial general liability, including contractual and personal injury coverage's - \$750,000 per claim and \$1,500,000 per occurrence.**

**Each policy of insurance required by this Section shall provide for no less than 30 days' advance written notice to the CITY prior to cancellation.**

**The CITY shall be listed as an additional insured on all policies except Worker's Compensation Policies.**

**Proposer shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Proposer shall maintain workers' compensation insurance coverage for all members and employees of Proposer's business, except for those members who are exempted as independent contractors under the provisions of §39-71-401, MCA.**

The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment.

### DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and 7-1-4144, MCA and may be distributed by written request pursuant to Montana's Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by Council. However, one copy of each

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proposal submitted shall be retained for the official files of the Department and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the City, do not become a public record and shall only be retained for official files.

Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Proposer understands that, if selected, the City reserves the right to provide its opinion publicly and privately regarding the Proposer's performance.

### QUESTIONS

Questions regarding the Request for Proposals contents must be sent to the contact person listed in Section 1 no later than 2 business days prior to due date for proposals. The City of Billings will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be posted on the City's website and forwarded to all Suppliers who have submitted an "Intent to Respond" form (Attachment E).

Supplier must submit their questions via email using the "Master Q & A" form found in **Attachment D**, and provide, at a minimum, the following:

- Supplier's name, requester, and appropriate contact information.
- The question, clearly stated.
- Specific reference to the applicable Request for Proposals section(s).

### RFP Response Submission

Upon the submission of the RFP response, the supplier acknowledges that all information is accurate and complete.

**All proposals must be mailed or emailed to contact person listed in Section 1.**

**No hand-delivered proposals will be accepted in order to prohibit the transmission of COVID-19.**

**Pricing must be in a separate sealed envelope or emailed under separate cover and "CMMS RFP Confidential Pricing" as the subject line.**

- **If proposal is mailed, pricing may be included in a sealed envelope; however,**
- **If proposal is emailed, pricing must be mailed in a sealed envelope or emailed under separate cover and "CMMS RFP Confidential Pricing" as the subject line.**

**If proposal is mailed, please also include or email an electronic version, minus pricing, of your proposal.**

### RFP Process Timeline

### Dates

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RFP/legal ad done:	3/4/2021
Advertise:	3/5/2021 & 3/12/2021
Preliminary Council memo due:	3/25/2021
Proposals must be <u>received</u> by 5:00PM:	3/17/2021
Evaluate and choose:	3/24/2021
Finalized Council memo and contract due:	4/1/2021
Council meeting:	4/12/2021

## **Section 4: RFP Evaluation and Selection Processes**

### Initial Evaluation

Proposals received will undergo an initial review to determine:

- Compliance with instructions stated in the RFP
- Compliance with proposal submittal date

### Phase II Evaluation

The evaluation of supplier's proposals may include, but is not limited to, the following criteria:

- Experience of Supplier with goods/services required by the City of Billings
- Capacity to assume new business
- Perceived ability to meet the City of Billings requirements
- Total Cost Competitiveness
- Availability (timetable) for providing goods and/or services
- Breadth of services available
- Company's financial stability
- Ongoing support
- Reporting capability
- Quality Control Process
- Process Improvements
- Training
- Compliance with the City of Billings Terms and Conditions
- Price

The City reserves the right to conduct interviews with all or some of the Proposers at any point during the evaluation process. However, the City may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating firms using the above-stated criteria.

The City also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.



## **Section 5: Scope of Work**

Below is a general outline of the anticipated scope of work. However, the final scope of work will be negotiated with the successful proposer.

### **Summary**

The Facilities division at the City of Billings manages 500,000 sq. ft. across multiple sites and has a team consisting of 10 employees. The software needs to have the capability for expansion both in terms of building sq. ft. and user accounts.

The CMMS software should meet at a minimum of 90% of the below requirements. List out the capabilities of your software for each item below. Additionally, there are questions that need to be answered. See below.

1. UX and dashboard
  - a. Organized enterprise screen for multiple sites, i.e., summary snapshot
  - b. Facility rendering in 3D, i.e., ariel view or BIM
  - c. Floor plan breakdown by areas with associated equipment
  - d. Calendaring with drag and drop functionality
  - e. Enterprise summary, i.e., open work orders, priority level, due dates, resource assignment
2. Work Order Management and PM's
  - a. Asset and equipment details for work orders
  - b. Different dashboard views such as work orders layered on plans
  - c. Task prioritization
  - d. Profile and permissions such as administrator, requestor, and technician
  - e. Search capabilities and sorting functions, i.e., status, categories, location
  - f. Categories and tagging
  - g. Work order history
  - h. Equipment association
  - i. Reminders and auto trigger for PM's
  - j. Task checklist and sequencing procedures for maintenance
  - k. Work order asset linking
  - l. Scheduled work orders, i.e., reoccurrence calendar scheduling
  - m. Time and materials tracking
3. Mobile Application
  - a. Work order ticket editing, scheduling, tracking
  - b. Offline functioning
4. Asset Management
  - a. Equipment lists
  - b. Condition assessment information
  - c. Barcoding and QR code scanning capabilities
  - d. Parts inventory
5. Vendor Management
  - a. Streamlined communications and automation
  - b. Email notifications
  - c. Time and materials tracking
6. Reporting Tools and Resources
  - a. Custom reports and analytics
  - b. KPI information, i.e., MTBF, equipment upkeep time, equipment health
  - c. Key word query search functions
  - d. Batch application

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- e. New equipment addition, i.e., ID tags, documents, manuals
- f. Data importing via CSV
- g. Deprecation, disposal, and amortization information

Questions:

1. Is there a dedicated customer support rep or account manager?
2. Are the customer support team reps in-house employees or are they outsourced?
3. How long does implementation take and what is the scope?
  - a. Tell us about the key people that will be part of the implementation team for our project.
  - b. Will implementation require on-site visits or will it mostly be done remotely?
  - c. Tell us about the training you recommend for preparing our staff to be successful with this new product?
  - d. Will the training be done remotely or on-site?
4. How frequent are software updates pushed out?
5. Are there additional charges for updates or is that included in the yearly price?
6. What is the yearly average uptime?
7. What is time to resolve in the event of an incident?
8. How are software problems escalated?
9. What start-up services do you offer?
10. What is included in start-up support?
11. Without including actual pricing, tell us about your pricing structure.
  - a. Is your software sold with an upfront cost and annual maintenance fees or is your software licensed with annual licensing fees?
  - b. Are your costs based on the number of named users, concurrent users, or other?
  - c. Is your software pricing based on the number of facilities or the size of our organization?
12. Is your system locally hosted or cloud-hosted?
  - a. If locally hosted, then:
    - What are the server and storage requirements of the solution?
    - What are the software requirements for the server?
    - Does your solution require services from an outward facing server for mobile application support?
    - How often do support staff need to access the local system and what are your security protocols for doing so?
  - b. If cloud hosted, then:
    - Where are the cloud services hosted? By your company? AWS? AZURE? Other?
    - Please describe your backup and disaster/recovery strategy.
    - Are the cloud hosting fees included in the price of the solution or are they separate (actual pricing should only be included on Attachment C)?
    - Do you have a Vulnerability Management Procedure in place to scan your servers for known vulnerabilities, manage patching the systems, and provide reporting if requested.
    - What is the bandwidth recommendation for accessing the cloud services?
    - Is a copy of our data available to the City of Billings if we wished to store a copy locally and/or if our relationship/contract were to end.
13. Does the mobile application work strictly on City Wi-Fi which is available in all of our facilities OR can it also function from outside our facilities using a cellular or other Wi-Fi connection?
14. We require the use of Microsoft SQL database. Does your system store data in Microsoft SQL?



15. How does your CMMS solution differ from others in the market?
16. Why should the City of Billings select your solution to meet our CMMS needs?



## ATTACHMENT A

### VALIDATION QUESTIONS FOR SUPPLIER

#### GENERAL INFORMATION

- 1) Company Name  
Address:  
Contact Name:  
Contact Phone:  
Contact Email:  
Website/URL:
- 2) How many facilities/locations do you have in the U.S? Please list.
- 3) How many years has your company been doing business under this name?
- 4) Total Full-Time Employees.
- 5) Do you have Small Business Administration Status? If yes, can you provide documentation?
- 6) What are your standard payment terms?
- 7) References - Please attach a Word<sup>®</sup> document with all contact information for at least the following three references:
  - a) New Company (started doing business with them in the past 12 months)
  - b) Retained Company (have been doing business with them for 3 + years)
  - c) Former Company (contract terminated in the past 2 years)
- 8) Can you provide a statement and meet the City of Billings minimum insurance requirements of \$750,000 per claim and \$1,500,000 per occurrence, and the City being named as an additional insured?

#### FUNCTIONALITY

- 1) A certificate of insurance must be provided prior to signing the contract, commencing on the day contract begins. Are you willing to comply with these requirements?
- 2) You must instruct your insurance broker/carrier to notify the City of Billings should your coverage change. Are you willing to do this?
- 3) The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment. Are you willing to do this?

#### QUALITY AND SERVICE

- 1) Do you have a quality assurance program? If yes, please attach a copy.
- 2) Are your employees required to take a mandatory drug test?

#### LEGAL ISSUES

- 1) Are there any pending lawsuits against your company? If yes, please explain.



## ATTACHMENT B

### PRICE MATRIX

(to be sent with proposal in a separate, sealed envelope)

<u>Computerized Maintenance Management Software (CMMS)</u>	<u>Price</u>
License fees (specify annual or one-time cost)	
Implementation Cost	
Training Cost	
Yearly maintenance/support costs	
Cloud hosting fees (if applicable)	
Travel expenses for implementation and training	
Other additional information about pricing structure, services provided, or details	

I/We acknowledge \_\_\_\_\_ addendum.  
#

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Contact Name (please print)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature of Contact Position

By signing the above, I certify that I am authorized by the Company named above to respond to this request.



## ATTACHMENT C

### CONDITIONS AND NON-COLLUSION FORM

To receive consideration, this form must be signed in full by a responsible, authorized agent, officer, employee or representative of your firm.

#### CONDITIONS AND NON-COLLUSION AGREEMENT

We have read and agree to the conditions and stipulations contained herein and to the Standard Terms and Conditions contained on the attached.

We further agree to furnish the services specified at the prices stated herein, to be delivered to the location and on that date set forth herein.

In signing this proposal, you also certify that you have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the due date and time to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

Legal Name of Firm/Corporation	Authorized Signature
Address	Printed Name
City/State/Zip	Title
Date	Telephone Number



## ATTACHMENT D

### MASTER Q & A FORM

PROJECT: [REDACTED]

<b>Master Q&amp;A</b>	Any questions regarding this Request for Proposals should be submitted according to the process outlined below. The City will make every effort to answer within two (2) days of receiving the questions.
<b>Q&amp;A Process</b>	<ol style="list-style-type: none"><li>1. Prepare questions or concerns on the template provided.</li><li>2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable).</li><li>3. Submit the completed form via email to <span style="background-color: yellow;">[REDACTED]</span>. Attach associated documents as necessary.</li></ol> <p>Please contact <span style="background-color: yellow;">[REDACTED]</span> with any questions regarding this process.</p>

**Questions from:** [REDACTED] **Company:** [REDACTED]

**Email Address:** [REDACTED]

#	Date	Reference Section	Question or Comment	City Response
1				
2				
3				
4				



## ATTACHMENT E

## INTENT TO RESPOND FORM

## RFP: Computerized Maintenance Management System (CMMS)

**Dated** \_\_\_\_\_

Fax or email the following Intent to Respond form to within two (2) days of RFP date even if your company chooses NOT to participate in the RFP.

**To:** City of Billings  
**Attn:** John Caterino  
**Email:** [caterinoj@billingsmt.gov](mailto:caterinoj@billingsmt.gov)

From: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contact Name  
Company Name  
Company Address

Phone Number  
Fax Number  
Email Address

We intend to respond to this RFP by the specified due date:

Yes \_\_\_\_\_ No \_\_\_\_\_

---

Company Name \_\_\_\_\_ Date \_\_\_\_\_

---

Contact Name (please print)      Title

---

### Signature of Contact Person

By signing the above, I certify that I am authorized by the Company named above to respond to this request.

210 North 27<sup>th</sup> Street P.O. Box 1178, Billings, MT 59101



## ATTACHMENT F

### PROPOSER CONTACT INFORMATION

#### ***A. Company Contacts***

Primary Contact Person (Name):	
Title/Function:	
Address	
Business Hours Phone:	
Fax:	
Internet E-mail Address:	
Name of Person Responding to Request:	
Title/Function:	
Address:	
Phone:	
Fax:	
Internet E-mail Address:	

#### ***B. General Company and Financial Information***

Company Name:	
Headquarters Address:	
City, State, ZIP	
Headquarters Phone:	
Headquarters FAX:	
Company Owned By:	
Percent % Ownership:	
Years In Business	
Name of CIO	
Name of CEO/President:	